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| **PHASE 1 INSPIRE**  Participants learn that JA Company Program is a life changing, hands-on experience that aims to inspires them to create an exciting entrepreneurial venture through collaboration.  **OBJECTIVES**  **Please feel free to use this week-by-week guide at your discretion to help you plan your meetings each week. The Advisor Tips/Suggestions column has some notes you may want to refer to while planning your weekly meetings and while you review the Detailed Instructions, Slides and other CP resources/materials.**   * Get to know each other, including strengths and motivations * Establish expectations and excite students about the program learning opportunity * Collaboratively develop group working norms * Consider a variety of possible products, services, and business models * Learn about the roles available within the Company and identify leadership styles | | | | |
| **INSPIRE | PHASE 1** | **AGENDA** | **RESOURCES** | **DUE** | **ADVISOR TIPS / SUGGESTIONS** |
| **Week 1:** Oct 28 – Nov 1 | |  | | --- | | * Attendance * Introductions * Icebreakers * Administration and Housekeeping * Overview of Company Program * Overview of achievements of other students (OPTIONAL) * Introduce Executive Roles * Getting to know yourself and Student Goal Sheet * Brainstorming and Pitch Activity * Product and Service Research Assignment * Questions and Wrap-Up |   Items in Green: Option to move to following week | * + Detailed Instructions   + Team Builders and Icebreakers   + Program Features and Benefits   + Getting to know yourself   + Student Goal Sheet   + Executive Roles   + Selection Process   + Brainstorming and Pitch Activities   + Product or Service Guidelines   + Product and Service Research Worksheet   **Videos:**   * Brainstorming * The “Itch” * Where Good Ideas Come From | **Parent Consent Form:**  Friday, November 1 | **Suggested Agenda Modifications:**   * Use this session to introduce the concept of brainstorming and have the students practice with the pitch activity * If you do not have time to cover the product and service research worksheet, move this to Week 2 * If students have ideas for their products/services, direct them to review the product/service guidelines and let them know to bring their ideas in Week 2 where you will go through the research worksheet   Use your best judgement at each session and during each section of the agenda – some activities may take shorter or longer than the suggested timing. Review with your advising team during and after each meeting to determine where you are in students’ learning and development. If students need more or less time, then adjust as needed. |
| **INSPIRE | PHASE 1** | **AGENDA** | **RESOURCES** | **DUE** | **ADVISOR TIPS / SUGGESTIONS** |
| **Week 2:** Nov 4 - 8 | |  | | --- | | * Attendance * Ice-Breaker * Defining Group Norms * What is Business Ethics? * Student Innovation * Corporate Social Responsibility * Leadership style and roles * Brainstorming * Importance of Prototyping * SMART Goals * Review Getting to know yourself and Student Goal Sheet * Questions and Wrap-up   **If the following were not covered in Week 1, then cover in Week 2:**   * Product and Service Research Assignment |   Items in Green: Option to move to following week  Items in Blue: Cover this week if missed last week | * + Detailed Instructions   + Team Builders and Ice-Breakers   + Team Norms Activity   + Building Your Team Norms   + What is Norming? Slides   + JA Company Code of Ethics Slides   + What would you do? Ethical Dilemmas and Company Program   + Executive Team Role Descriptions   + Department Responsibilities   + Selection Process   + Pitch Evaluation Criteria   **Slides:**   * + Whose Norms Are These?   + Company Product Examples   + Corporate Social Responsibility   **Videos:**   * + Innovation and Invention   + SMART Goals   + Leadership   + Business Models |  | **Suggested Agenda Modifications:**   * You may not have time to cover the agenda items in green. You may want to start some of the items and complete them in Week 4, after the elections if you do not finish   Ensure that students are aware of the executive roles and the process they need to follow to nominate and prepare themselves for the elections in Week 3. Consider limiting the number of roles students can nominate themselves for to a maximum of two.  Use your best judgement at each session and during each section of the agenda – some activities may take shorter or longer than the suggested timing. Review with your advising team during and after each meeting to determine where you are in students’ learning and development. If students need more or less time, then adjust as needed. |
| **PHASE 2 UNITE**  Participants unite ideas and people to form the leadership framework, innovative market solution, and business model to achieve the co-created mission.  **OBJECTIVES**   * Understand the criteria for selecting the nature of the business venture, potential mechanisms for funding business ideas and product pitching * Establish the details of the student company using the business model canvas and clearly define the proposed value proposition * Revisit the concept of leadership and define roles * Finalize the mission and establish the organizational structure * Establish the department functions and individual responsibilities to the team | | | | |
| **UNITE | PHASE 2** | **AGENDA** | **RESOURCES** | **DUE** | **ADVISOR TIPS / SUGGESTIONS** |
| **Week 3:** Nov 11 – 15  **ELECTION WEEK!**  **Teams must complete their elections this week and send in their list of student executives by end of day Friday.** | * + Attendance   + Leadership Ice Breaker   + Selection Process   + Determine Executive Team and all Stakeholder Roles   + Employee Handbook   + Remind Executives of Student Management Training on November 30   + Wrap-up   Items in Green: Option to move to following week | **Documents:**   * + Detailed Instructions   + Leadership Ice Breakers   + Interview Process – Questions for Candidates   + All Functional Area Roles   + Organizational Structure Template   + Employee Handbook Template   + Code of Ethics | **Executive Names:**  Friday, November 15 | **Suggested Agenda Modifications:**   * Elections will take up most of this week’s session; You can items in green to Week 4 * Not everyone will get an executive role – remind students that their role in the company regardless of their title is important – what they contribute and get out of the program is up to them * Encourage teams to assign additional roles in the company (reference All Functional Roles for suggestions but teams can come up with their own as well)   Use your best judgement at each session and during each section of the agenda – some activities may take shorter or longer than the suggested timing. Review with your advising team during and after each meeting to determine where you are in students’ learning and development. If students need more or less time, then adjust as needed. |
| **UNITE | PHASE 2** | **AGENDA** | **RESOURCES** | **DUE** | **ADVISOR TIPS / SUGGESTIONS** |
| **Flexible**  **Week 4, 5 and/or 6** | * Attendance * Icebreaker (choose your own)   **If the following were not covered in Weeks 2/3, then cover in Weeks 4-6:**   * Defining Group Norms * What is Business Ethics? * Corporate Social Responsibility * Importance of Prototyping * Continue working on Employee Handbook * Continue brainstorming/ideation   **Once you have decided on the date for your product pitches (between weeks 4 to 6), then follow this agenda for that session:**   * + Attendance   + Snake Oil Ice-Breaker   + Idea Pitches   + Business Model Canvas   + Mission Statement   + Venture Funding   + Wrap-up   Items in Green: Option to move to following week  Items in Blue: Cover this week if missed last week | **Documents:**   * + Detailed Instructions   + Snake Oil Instructions   + Snake Oil Cards   + Pitch Evaluation Criteria   + Business Model Canvas template   + Mission Statement Template   + Capitalization Requirements   + Record Keeping Tool   **Slides:**   * Build-Measure-Learn   **Videos:**   * + Business Model Canvas | Product Approval Forms are due at the end of Week 8 (December 20). Product pitches and selection can happen anytime before then but make sure you allow enough time for teams to decide on their product/service and complete the Product Approval Form (including any prototypes). | **Suggested Agenda Modifications:**   * See where your team is regarding their brainstorming/ideation before deciding which date to do your idea pitches – remember that students should have enough time to come up with their ideas, complete the product and research assignment before moving on to pitches. * Consider designating an entire meeting to product pitches/selection/discussion – this can take place anytime between Weeks 4 to 6 * The items in green can be completed anytime between Weeks 4 to 7 and can be split between multiple meetings   Use your best judgement at each session and during each section of the agenda – some activities may take shorter or longer than the suggested timing. Review with your advising team during and after each meeting to determine where you are in students’ learning and development. If students need more or less time, then adjust as needed. |
| **PHASE 3 BUILD**  Building a new business requires a strong foundation based on planning, strategy and communication.  **OBJECTIVES**   * Create an accountability framework and department work plans * Develop and establish Key Performance Indicators (KPI) and department work plans * Quantify start-up capital needs, resources, and break-even point * Create the Lean Business Plan | | | | |
| **UNITE | PHASE 3** | **AGENDA** | **RESOURCES** | **DUE** | **ADVISOR TIPS / SUGGESTIONS** |
| **Proceed to Phase 3 once your team has decided on a Product/Service**  **Depending on where your team is, this can start anytime between Weeks 5 to 8** | * + Attendance   + Review Business Model Canvas and Mission Statement   + Key Performance Indicators and Business Planning   + Company Meetings   + Creation of Lean Business Plan (if applicable)   + Product Approval   + Record Keeping   + Wrap-up | **Documents:**   * + Detailed Instructions   + Business Model Canvas   + Mission Statement   + Key Performance Indicator Worksheet   + Work Plan Template   + Department Responsibilities   + Work Plan Template   + Resources Available by Department   + Sample Meeting Agenda   + Record Keeping Tool   + Lean Business Plan template   + Long Business Plan template   **Videos:**   * + KPI   + Record Keeping Instructions | **Product Approval Form:**  Friday, December 20  **\*As soon as the team has decided on a product, submit the product approval form to JA – the latest date to submit is December 20; do not proceed with your product/service until you have received approval from JA** | * + Some students may begin to lose interest/motivation because they either did not get elected as an executive or did not have their product idea chosen by the team. Remind students that they do not have to have accomplished either of these to make a significate contribution to their company and even be nominated for an award.   + If the team has not already established roles in the company beyond the Executive Roles, this is a good time to assign these roles   Use your best judgement at each session and during each section of the agenda – some activities may take shorter or longer than the suggested timing. Review with your advising team during and after each meeting to determine where you are in students’ learning and development. If students need more or less time, then adjust as needed. |
| **PHASE 4 LAUNCH**  Successful entrepreneurial ventures are results of efficient production, compelling sales and accurate metrics.  **OBJECTIVES**   * Implement the strategy defined by the Business Model Canvas and/or Lean Business * Plan and apply department work plans * Continue production or product or marketing of service * Conduct sales * Maintain accurate records | | | | |
| **LAUNCH | PHASE 4** | **AGENDA** | **RESOURCES** | **DUE** | **ADVISOR TIPS / SUGGESTIONS** |
| **Winter Holiday Break (No meetings):**  Dec 23 – Jan 3  **Optional Working Sessions (Student Exam Break):**  Jan 20 – 24  Jan 27 – 31  Consider hosting an optional working session during one of the exam weeks (decided on by the team) – this session would be optional and would allow the team to work on their business plan or production, etc. | * + Company Meeting   + Conduct Business Operations   + Monitor Company Success   + Plan for and conduct Interim Status Meeting   + Wrap-Up   *Flexible Lessons:*   * Personal Finance (Mandatory) * Delegation (Optional) * Change Management (Optional) | |  | | --- | | **Documents:**   * Detailed Instructions   + Sample Meeting Agenda – Interim Status Meeting   + Change Management Activities | | **Business Plan & Fixed Costs #1:** Friday, January 31  **Student Names for Tradeshow:** Friday, March 6  \*In early March, discuss with your Advising team who you wish to nominate for the Company Program awards and let the nominees know so that they can start preparing their applications due the first week of April. An Overview of the awards is found on the resource portal and more details will be shared on the application process. | * Continue to do teambuilding and icebreaker activities throughout the year to keep motivations and teambuilding up (especially after the holiday breaks) – have your VP of HR (+department members) and other executives lead and get everyone involved * Check in with individual students on their goals (review their personal goals from early in the program) to make sure they are on track and provide support/guidance * Re-iterate the commitment/attendance policies to students; if there are any changes or conflicts, follow up immediately and work with students to find solutions/alternatives * Choose one or two weeks to cover Personal Finance (and optional Delegation and Change Management) with students (February may be a good time). |
| **PHASE 5 ACHIEVE**  Personal potential is realized when individuals take risks, engage in new experiences and collaborate with others, and celebrate the success achieved together.  **OBJECTIVES**   * Understand the steps to close a business * Share learning outcomes and successes in a variety of formats * Conduct a final status meeting * Reflect, appraise, and submit feedback to improve program experience | | | | |
| **ACHIEVE | PHASE 5** | **AGENDA** | **RESOURCES** | **DUE** | **ADVISOR TIPS / SUGGESTIONS** |
| **Weeks 16 to 18**  **March Break (No meetings)**  Mar 16 – 20  **(Trade Show will be held this week)**  **Optional Week:**  Apr 6 – 10  This is an optional week in case any sessions were missed due to inclement weather or if your team needs additional time to finish off their business | * + Company Meeting   + Review requirements described in the Final Report and Presentation Outline   + Review Liquidating and Concluding Guidelines * Review Sample Meeting Agenda – Final Status Meeting * Finalize records, data, and reports * Final Status meeting * Debrief & Celebration | **Documents:**   * + Detailed Instructions   + Liquidation and Concluding Guidelines   + Final Report and Presentation Outline   + Sample Meeting Agenda - Final Status Meeting | **LoyaltyOne Commercial Contest (Battle of the Ads):** Friday, March 27  **Award Nominations:**  Friday, April 3  **JA Taxes (if applicable), Fixed Costs #2 and Final Shareholder’s Report:**  Friday, April 17 | * There are two weeks after the March Break/Trade Show + an optional 3rd week to complete the liquidating and concluding requirements * Week 16 may be needed to prepare for Trade Show, however, you may want to review the final report requirements and the liquidating guidelines with them so that they are aware of what’s to come * March Break (including Trade Show) should be the last selling opportunity for students * Encourage students to return after Trade Show to finish off the year, finalize their share money/profit and celebrate as a team – give students an opportunity to discuss leading up to the last few weeks how they want to end the year so that they have something to look forward to! Consider having everyone bring in snacks, pitch in for pizza/food and plan their end of year celebration together |