



ACCT 5134: Advanced Integration 1

SUMMER 2025

Instructor	Lori Flanagan MA, MBA, CPA, CMA, OCT
Email Address	loriflanagan@cunet.carleton.ca
Class Times	Section A: Tuesday & Wednesday 2:35pm – 5:25pm Section P: Tuesday & Wednesday 6:05pm – 8:55pm
Modality	Asynchronous, In Person & Online
Office Hours	By Appointment

Pre-Requisites & Preclusions:

Prerequisites: ACCT 5128 and Completion of a minimum of 2.0 credits in the Master of Accounting program with a minimum average grade of B-.

Course Description/Instructor's Statement

Carleton Calendar Description (Find at <https://calendar.carleton.ca/undergrad/courses/BUSI/>)
Discussion, analysis, and integration with an emphasis on the application of strategic management to various accounting and finance issues

Instructor's Description:

This is a course designed around doing the work of solving a case. We begin by learning about the CPA Way and quickly learn to apply these steps to a comprehensive case. By the end of the session, students will be capable of resolving cases under exacting CPA conditions.

To address the specific core competencies students will be expected to work in groups. Students may find it useful to spend some time prior to class discussing the issues that are involved in the cases. All students will be expected to analyze and participate in the discussion of the case.

This course involves a combination of interactive class sessions, lectures and coaching. Students will receive instruction on the problem-solving process and discover what is required to resolve a strategic/accounting case. Students will then have opportunities between in-class sessions to work on a comprehensive case and will receive group-based coaching and feedback on their performance.

Course Learning Objectives:

1. Strategic thinking skills: Strategic thinking skills allow us to draw unique insights that enable organizations to overcome key challenges they face and seize opportunities to create value.
2. Structured problem-solving skills: Structuring your analyses to develop a logical argument enables business professionals to balance rigor and efficiency in solving complex business scenarios.

3. **Structured financial evaluation skills:** This course emphasizes the fundamental techniques of financial statement analysis. Building upon core accounting and investment concepts, the course covers the analysis (including ratio analysis) and interpretation of financial accounting information including the balance sheet, income statement, and statement of cash flows. The course also examines the use of accounting information in investment decisions as applied to resolving a case problem.
4. **Teamwork and/or Leadership:** Students will be able to work effectively within and/or leading teams.
5. **Communication:** Students will be able to communicate effectively (both written, orally and visually) through speaking, writing and visually presenting their work with clarity and persuasion.

Required/Optional Materials & Prices

Required Technology: Functioning webcam and microphone.
 Course Materials: Capstone case materials, class presentations (videos and ppt), supporting documentation and references will be provided in Brightspace.

Key Deliverables

<p>Team Agreement Workplan & Schedule Workplan Audit Trail Weekly submissions on specific aspects of the case analysis Draft report and presentation Final Written Report* Final Oral Presentation*</p>	<p>Final Written Report* Based on the board report case 8,300 words, 25 pages appendices (Word and Excel combined, specifications provided on Brightspace) Assessed by the professor using the rubric on Brightspace.</p> <p>Final Oral Presentation* 3 minutes, 15 minutes Q&A Assessed by a professional CPA panel and professor (based on availability) using rubrics on Brightspace.</p>
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Grading Scheme

Weekly assignments related to the case analysis will be grading on an initial scale of Competence with Distinction (CD), Competent (C), Reaching Competence (RC), Nominal Competence (NC) and Component Missing (CM).

Teams must achieve a grade of at least C (after revisions) to pass each part of the report.

Final report submission and final presentation to the panel will be graded on a Satisfactory/Unsatisfactory model (or pass/fail).

Please note that you pass together or fail together as a group.

Important Dates to Note

Team Agreement, Workplan & Schedule	May 9th, 2025
Assess the Situation & Workplan Audit Trail	May 11th, 2025
Analyze the Major Issues & Workplan Audit Trail:	May 17th and May 24th, 2025
Final Edited Draft Report & Workplan Audit Trail:	May 31st, 2025
Draft Presentation & Workplan Audit Trail	June 7th, 2025
Final Report & Workplan Audit Trail:	June 14th, 2025
Final Oral Presentation	June 15th
Presentation of Report to Panel:	June 16th, 17th or 18th, 2025

University Academic Calendar: <https://calendar.carleton.ca/academicyear/>

Policies & Accommodations

<https://students.carleton.ca/course-outline/>

<https://carleton.ca/pmc/current-students/academic-accommodations/>



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