

# January 20, 2004 Issue 305-2004

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## Feature Paper

### "Accounting, Marketing And Performance Management"

This paper was presented by Val Clulow & Louise Kloot School of Business, Swinburne University of Technology, Australia at the 34th Annual DSI conference on November 22 - 25, 2003 in Washington D.C.

Many service functions in companies, such as human resources, logistics and finance now compete against private providers who welcome the shift to outsourcing. To maintain relevance and viability, these internal functions need to be able to demonstrate their quality and level of contribution and indicators of a return on budget allocated. A conceptual model ( Frost and Kumar, 2000) identifies three pertinent 'gaps' and their utility is explored. Gap 1 was operationalised using a survey of accountants and marketers and pointed to significant gaps existing in the understanding and use of some analytical measures designed by accountants for marketers.

To read the entire paper on "Small Business Research Program An Alternative Financing Source", visit the SBANC Web Site at <http://www.sbaer.uca.edu/research/2003/dsi//procs/101-3716.pdf>

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## Tip Of the Week

### "Checklist For Evaluating A Company"

The following is a detailed list of questions used by investors to conduct an investigation in order to provide a reasonable basis for investments in the company.

- incorporation documents and other organizational papers
- list of places in which the company is qualified to transact business

- list of directors and officers, including brief description of current duties and current compensation
- minute books, including all shareholders, director, and committee minutes and written consents
- list of stock options, warrants, and purchase plans, including copies of any agreements.

### **Real property**

- list of all property owned in fee and their locations (and mortgages or trust deeds related thereto)
- list of all leases and sub-leases of real property
- list of all liens or encumbrances against real property
- copies of any appraisals of real property owned or leased
- copies of any assignment of leases made for security purposes or otherwise
- copies of any engineering reports prepared regarding real property owned or leased
- copies of any guarantees or warranties relating to improvements on real property
- copies of any outstanding notices of violation
- list of condemnation or eminent domain proceedings pending or threatened against real property

### **Plant and Equipment**

- list of machinery and equipment, motor vehicles, office furniture, fixtures, and inventory and locations where these are kept, including a complete list of motor vehicles used or operated by the company
- copies of all contracts or options to purchase, sell, or lease material or personal property
- copies of all installment contracts for the purchase of personal property or equipment

### **Contracts**

- copies of all agreements for the purchase or lease of capital equipment in excess of \$5,000 for any one agreement
- copies of all agreements for their performance of services
- copies of all agreements relating to the borrowing of money or extension of credit, promissory notes, indentures, lines of credit, letters of credit, security agreements, and guarantees.
- copies of all sales agency or representative, manufacturer representatives, distributorship, and franchise agreements
- copies of all product development contracts
- copies of all joint venture agreements
- copies of all stockholder agreements, voting trust agreements, and other voting agreements
- copies of any acquisition or merger agreements

### **Litigation**

- list of all pending or threatened lawsuits, claims and assessments, indicating those for which insurer has accepted liability
- copies of all judgments, decrees, final orders, rulings, injunctions, and temporary orders
- list of all patent infringement claims or other claims with respect to intellectual property asserted by or against the company

### **Insurance**

- list of and copies of all current insurance policies and commitments, including personal injury,

property, product liability casualty, key-man, and directors/officers

**Intangible property**

- copies and list of all pending applications for patents, trademarks, trade names, copyrights, and other intellectual property rights
- copies and list of all providing inventions and invention disclosures

**Tax**

- copies of any notices from state or local authorities regarding returns, deficiency claims with regard to income, sales, property, or other taxes
- list and brief description of any ongoing tax disputes, together with copies of revenue agents' reports, correspondence, and so on

**Financial**

- list of bank accounts and average balances
- copies of credit reports from banks
- statement of inventories
- list of offices where records relating to receivables are kept
- list of aged accounts receivable and description of credit and collection policies and copies of feasibility studies, strategic planning documents, and financial forecasts

"Patterns Of Entrepreneurship" Jack M. Kaplan, John Wiley & Sons, Inc., 2003, page 180-181.

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**Call For Papers**

**"2004 International Business & Management Research Conference"**

The 2004 International Business & Management Research Conference will be held on June 9-12, 2004 in Honolulu, Hawaii at the Hilton Hawaiian village Beach Resort & Spa, Waikiki Beach.

Submission Deadline: February 15, 2004

For more information on this conference, visit <http://www.jaabc.com/hawaii.html>

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**Call For Papers**

**"3rd International Conference on Information and Management Sciences "**

The Third International Conference on Information and Management Sciences is held to push the development and applications of information and management sciences in business, engineering,

economics, medicine, and other related disciplines. The conference will be held on June 5-10, 2004 in Dunhuang China.

Submission Deadline: April 5, 2004

For more information on this conference, visit <http://orsc.edu.cn/IMS2004/>

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## Call For Papers

### "2004 Applied Business Research Conference"

The next ABR Conference will be held at the beautiful Caribe Hilton in San Juan, Puerto Rico during the week of March 15-19, 2004. The Caribe Hilton has ocean front swimming pools and whirlpools next to its pristine and secluded beach along the blue water of the Atlantic Ocean. If you choose to get away from the hotel, you can visit the casinos that are located in many hotels around the Island. Old San Juan is famous for its Spanish History, the El Yunque rain forest, and the Arecibo Observatory which has the largest single-dish radio telescope in the world. The hotel also offers the 12,000 sq. foot Olas Spa & Health Club, tennis courts, fine restaurants, health bar and café, Tapas bar, nightly entertainment bar, and more. Since Puerto Rico is a US territory, passports or visas are not necessary for US citizens, and the US dollar is the local currency.

Submission Deadline: All submissions are to be sent by email attachment to [cluter@wapress.com](mailto:cluter@wapress.com) by February 15, 2004

For more information on this conference, visit [www.wapress.com/abrcmain.htm](http://www.wapress.com/abrcmain.htm)

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## Conference

### "ASBE 29th Meeting"

The Association for Small Business and Entrepreneurs (ASBE) invites you to submit a competitive paper for the 29th Annual Meeting that will be held on March 24-26, 2004 in Albuquerque, New Mexico at the La Posada de Albuquerque hotel. This years focus is "Small Business & Entrepreneurship: Meeting the Challenges in a Changing World."

For more information on this conference, visit <http://www.sbaer.uca.edu/asbe/call2004.cfm>

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## Conference

**"The Administrative Sciences Association of Canada"**

The Administrative Sciences Association of Canada Entrepreneur and Family Business Division invites you to submit a paper or symposium proposal for the 2004 Annual Conference. The conference will take place from June 5-8, 2004 in Quebec City, Quebec, Canada. The theme for this years conference is the "Research agenda for the next decade".

For more information on this conference, visit <http://www.asac.ca/asac.htm>

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**Conference**

**"3rd International Conference on Healthcare Systems "**

The Third International Conference on Healthcare Systems will be held in Charleston, West Virginia, USA from October 14-17, 2004. This is the first time that this international conference will be held in the United States. The first international conference was held in Queretaro, Mexico in May 2000, and the second international conference was held in Ankara, Turkey in July 2002. Both conferences were extremely successful in fostering relationships between healthcare academics and practitioners of many countries. These individuals were either academicians, professionals, or students from fields such as, health care administration, management, marketing, medicine, nursing, occupational/physical therapy, pharmacy, public health, dentistry, and education.

For more information on this conference, visit [www.marshall.edu/healthcare-conference](http://www.marshall.edu/healthcare-conference)

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**Announcement**

**"Academy Of Family Business" An Academy of the Allied Academies "**

The journal for the Academy Of Family Business is seeking reviewers. Please contact Editor Dr. Don B.

Bradley III at [DonB@uca.edu](mailto:DonB@uca.edu) if you are interested, thank you.

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## Announcement

### "May 2004 Study Abroad Trip"

The University of Central Arkansas is offering undergraduate students a study abroad trip to the University of Limerick (Ireland) and to the University of Luton (England). Students will be able to gain six upper division college hours in the areas of marketing & management. The May 2004 study abroad trip will also consist of side trips to London (England) and Paris (France) to let students gain insight on the European Union. If you are interested or if you know someone who is please contact Dr. Don. B Bradley III at [Donb@uca.edu](mailto:Donb@uca.edu), thank you.

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If you have any comments about the SBANC Newsletter, or if you know of an upcoming Small Business event to promote, please contact Lester W. Clements II at [newsletter@sbaer.uca.edu](mailto:newsletter@sbaer.uca.edu)

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The SBANC Newsletter is provided as a service to the members of our affiliates: **Academy of Collegiate Marketing Educators (ACME), Association for Small Business & Entrepreneurship (ASBE), Decision Sciences Institute (DSI), Federation of Business Disciplines (FBD), International Council for Small Business Congress (ICSB), Institute for Supply Management, The International Small Business Congress (ISBC), Marketing Management Association (MMA), Small Business Administration (SBA), Service Corps of Retired Executives, Small Business Institute (SBI), Society for Marketing Advances (SMA), United States Association for Small Business & Entrepreneurship (USASBE), U.S. Department of Veterans Affairs and Western Decision Sciences Institute (WDSI).** If you are interested in membership or would like further information on one of our affiliates, please see our web site at <http://www.sbaer.uca.edu>

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