

Al-Faraby Kazakh National University
Higher School of Economics and Business
Department of Management

**PROGRAMM AND
METHODICAL RECOMMENDATIONS FOR RUNNING OF
FINAL EXAM IN DISCIPLINE**

ID 105590 “Management analysis and forecasting”

**on the educational program «State and Local government», Management,
Project Management, Innovation Management**

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Lecturer: Adambekova A.A. d.e.s professor
Department of Management
(Ф.И.О., ученая степень, ученое звание, должность)

The program of methodical recommendations for the final exam in the discipline " Management analysis and forecasting " were considered and approved at a meeting of the department " Management "

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Introduction

The relevance and practical significance of the academic discipline "Managerial Analysis and Forecasting" are due to the fact that the study and solution of modern approaches in managerial analysis and forecasting is the most urgent task of business management both from the position of finding effective approaches to management with minimal costs and profit maximization in combination with development forecasting. In this regard, studying and passing the exam in the discipline "Managerial Analysis and Forecasting" seems especially relevant for students of the Educational Program 8D04103 Public and Local Government, 8D04105 Innovative Management, 8D04106 Management, 8D04107 Project Management, 1st year doctoral students, Russian department. The exam will be conducted orally, in an offline format.

Software topics for exam preparation

- 1 The role of management analysis in making management decisions: industry specifics.
2. Topic Methods and techniques of strategic management analysis.
3. Topic Methods and techniques of operational and current management analysis.
4. Topic Management analysis of responsibility centers: key assessment indicators.
5. Topic Fundamental performance indicators.
6. Topic Alternative performance indicators.
7. Topic Behavioral thinking in management analysis: risk appetite criteria.
8. Topic Management analysis of costs: cross-assessment.
9. Topic Non-budgetary management in making management decisions.
10. Topic Uncertainty and risk in decision making.
11. Topic Forecasting and modeling in making management decisions. Role, approaches and key methods
- 12 Topic Forecasting and modeling tools in making management decisions.
13. Topic Forecasting and modeling in management decision making: testing
14. Topic Forecasting and modeling in management decision making. Application: visualization, interpretation

As a result of studying the discipline, the student should be able to:

- learn and apply alternative methods of management analysis and forecasting of socio-economic processes based on classical and modern scientific concepts of management analysis
- apply methods of environmental diagnostics, analyze and systematize information for making management decisions, forming organizational structures, implementing changes in the organization, control, organizational culture, conflict management, criteria for assessing management activities for sustainable development
- possess the skills of processing business information, using the basic methods of analyzing financial and non-financial indicators necessary for economic forecasting.

- identify the conditions that determine cost design and approaches to management analysis and managing the life cycle of a business/project/product
- apply risk assessment and management techniques; assess the impact of macro- and microfactors on the conditions for implementing the principles of sustainable development and uncertainty

Program topics and questions for exam preparation

1. The role of management analysis in making management decisions: industry specifics .
2. The purpose, objectives and role of management analysis
3. Methods and techniques of strategic management analysis.
4. Strategic management analysis: features, methods and key tools
5. Methods and techniques of operational and current management analysis.
6. Operational and current management analysis: key methods and techniques
7. Management analysis of responsibility centers: key evaluation indicators.
8. Identification of responsibility centers: object-by-object management analysis
9. Fundamental performance indicators.
10. Identification of fundamental performance indicators: sources of information, approaches to analysis and evaluation
11. Alternative performance indicators.
12. Identification of alternative performance indicators by research profile
13. Behavioral thinking in management analysis: risk appetite criteria.
14. Managing behavioral thinking and risk appetite in management decisions
15. Management analysis of costs: cross-assessment.
16. Cost-based pricing strategy. Target cost management
17. The influence of TQM\ Just in Time\ ABC in cost management
18. Non-budget management in making management decisions.
19. Conditions for implementing the principles of non-budget management
20. Uncertainty and risk in decision-making.
21. Identification of uncertainty and risks of the research object
22. Forecasting and modeling in making management decisions. Role, approaches and key methods
23. The influence of forecasting and modeling on making management decisions of the research object.
24. Data collection, preparation for forecasting
25. Forecasting and modeling tools in making management decisions.
26. Application of forecasting and modeling on the research object
27. Forecasting and modeling in making management decisions: testing
28. Testing the results of forecasting
29. Forecasting and modeling in making management decisions. Application: visualization, interpretation
30. Visualization and interpretation of forecasting results

Format of the offline oral exam in the discipline "Management Analysis and Forecasting"(according to schedule)

The exam will be conducted based on the results of 15 weeks of study orally on the Univer IS platform in offline format.

OFFLINE ORAL EXAM consists of answering questions on tickets generated in advance in the dean's office and placed in a sealed envelope, which is opened by the chairman of the examination committee, consisting of 3 people, at the beginning of the exam, when the exam time comes according to the exam schedule. The schedule must be known to students and members of the committee in advance.

Doctoral students being examined must appear for the exam in full force 10 minutes before the start of the exam, presenting an identity card or passport (it is PROHIBITED to take the exam by ID card and photocopy of documents) and sign the attendance sheet. Examinees take tickets, sit down and prepare for 10-15 minutes. Up to 15 minutes are allocated for the answer. The exam is monitored by the commission members, and video surveillance is conducted. At the end of the exam, the commission makes a decision on each examinee and formalizes its decision in a protocol, and then the chairman enters the points in the final report in the Univer IS.

Format of the online oral exam in the discipline "Management Analysis and Forecasting" (according to schedule)

The exam will be conducted based on the results of 15 weeks of study orally on the Univer IS platform in an online format.

THE ONLINE ORAL EXAM consists of answering questions on tickets generated in the Univer IS platform and displayed on the screen after the doctoral student has started the exam according to the scheduled time. A committee of 2-3 people is present at the exam online. The link to the exam is posted in the exam schedule in the Univer IS. The schedule must be known to students and committee members in advance.

Doctoral students being examined must ensure a good level of Internet connection to ensure the smooth conduct of the exam. After the examiner has checked the doctoral student's readiness, the examiner starts the recording of the exam. The doctoral student must present an identity card or passport (it is PROHIBITED to take the exam with an ID card and a photocopy of documents) on the computer camera. The examinee opens access to his computer screen, logs into the Univer IS using his login and password, then selects a discipline and starts the exam. The Univer IS will randomly generate questions for the exam ticket. The members of the commission must have access to the image on the screen. The doctoral student gets 10 minutes to prepare for the exam, solve problems, and cases. Up to 15 minutes are allocated for the answer. The course of the exam must be recorded, the recording is stored in a special folder on the Google Drive of the Department of Management. At the end of the exam, the commission makes a decision on each examinee and formalizes its

decision in a protocol, and then the chairman enters the points in the final report in the Univer IS.

During the exam, the student must provide complete answers to the questions asked and demonstrate the achievement of the following learning outcomes:

- demonstrate systemic understanding of the main categories of management analysis and forecasting;
- show an understanding of the connections between the theoretical foundations and modern practice of management analysis and forecasting, through a demonstration of examples of the influence of external and internal conditions (circumstances) on making management decisions
- analyze reporting forms;
- use knowledge of the most important methods and tools for conducting management analysis and forecasting.

The answer will be assessed according to the "CRITERIA ASSESSMENT RUBRIC OF THE FINAL CONTROL"

Final control of progress - exam (40% in the final grade)

Exam Form	Brief description of the exam format	Evaluation criteria
Written (combined)	The exam has three parts	Part 1 – 40 % Part 2 – 30% Part 3 – 30%
	<u>First part: an open question consisting of two parts, revealing the essence and explaining the functions.</u>	<i>Open question: Knowledge of the theory of the question - 10 points, reasonable argumentation 10, giving an example - 10, conclusion 10 Total 40points</i>
	<u>The second part includes an open question consisting of two parts, revealing the essence of which it is necessary to give an example.</u>	<i>Task: Correct application of the methodology, solution 10, comments 10 giving an example 10 Total 30 points</i>
	<u>The third part: to analyze the presented case according to the applied questions</u>	<i>Situational task: problem -5 (according to the presented case), what problem arises in cost management- 5, what options for their solution can take place 10 (proposed directions), Conclusions - 10. Total 30 points</i>

Literature:**

Main:

1. CIMA P1 Kaplan study text

<https://kaplanpublishing.co.uk/cima/professional-operational/management-accounting-p1/study-text>

2. CIMA P1 BPP study text
<https://learningmedia.bpp.com/product?catalog=ITP12021>
3. Operational Management exam-kit
<https://kaplan-learning.com/bookshop/cima/professional-operational/management-accounting-p1/exam-kit>
4. Management Accounting, 4th Edition
<https://www.wiley.com/en-us/Management+Accounting%2C+4th+Edition-p-9780730369424>
5. Break-even cost analysis
<https://templates.office.com/en-us/breakeven-cost-analysis-tm01116512>
6. CIMA Case studies
<https://www.cimaglobal.com/Research--Insight/Case-studies/>
- 7 "Analysis of Financial Time Series" (3rd Edition) by Ruey S. Tsay.
https://file-lianxh.oss-cn-shenzhen.aliyuncs.com/Refs/Books/Tsay_2022.pdf

Additional Reading:

8. Dean Frost. Strategic Management: Analysis and Skills in a High Tech Business Environment, Cognella Academic Publishing, 2024. 222p.
9. Alain Ndedi. **STRATEGIC FINANCIAL ANALYSIS AND PLANNING** (International Journal of Business Management and Research (IJBMR) Book 3)
. RIBA Publishing, 2021. p.72
10. [Wyn Jenkins](#), [Dave Williamson](#) Strategic Management and Business Analysis
. English. 2022. p.280.

Research infrastructure

1 MS Excel

Professional scientific databases

- 1 <https://www.scopus.com/>
- 2 <https://www.elsevier.com/>
- 3 <https://access.clarivate.com/>

Internet resources

1. <http://elibrary.kaznu.kz/ru>
- 2 <https://ru.coursera.org/>
- 3 <https://be.kaznu.kz/>
- 4 <https://vestnik.turan-edu.kz/>

CRITERIA EVALUATION OF LEARNING OUTCOMES

Discipline: “Management analysis and forecasting”

Criteria/score	Descriptors				
	Excellent	Good	Satisfactory	Unsatisfactory	
	90–100	70–89	50–69	25–49	0–24
Knowledge and understanding of course theory and concepts	An “excellent” grade is given for an answer that contains a comprehensive disclosure of all three questions (within the limits of acquired knowledge), a detailed argumentation	A “good” rating is given for an answer that contains a complete but not exhaustive coverage of all issues, an abbreviated argumentation of the main points, and allows for a violation of the logic and	A “satisfactory” rating is given for an answer that contains incomplete coverage of the questions proposed in the ticket, superficially argues the main points, allows compositional imbalances in the presentation,	Incorrect coverage of the questions posed, erroneous argumentation, factual and verbal errors, assumption of an incorrect conclusion. Ignorance of basic concepts, theories...;	Violation of the Rules for final control.

	for each conclusion and statement, is constructed logically and consistently, and is supported by examples from the developed classroom topics.	sequence of presentation of the material. The answer contains stylistic errors and inaccurate use of terms.	violations of the logic and sequence of presentation of the material, and does not illustrate theoretical points with examples from the developed class notes.		
Application of the selected methodology and technology to specific practical tasks	Complete completion of the educational assignment, a detailed, reasoned answer to the question posed, followed by solving practical problems of the course;	Partial completion of the educational assignment, incomplete, sometimes reasoned answer to the question posed with an incomplete solution to the practical problems of the course; illiterate use of scientific language norms in the course;	The material is presented in fragments, in violation of logical sequence, factual and semantic inaccuracies are made, and theoretical knowledge of the course is used superficially.	An irrational method of solving a task or an insufficiently thought-out answer plan; inability to solve problems, perform tasks in general; making mistakes and omissions that exceeds the norm.	Inability to apply knowledge and algorithms to solve tasks; inability to draw conclusions and generalizations. Violation of the Rules for final control.
Evaluating and analyzing the applicability of the chosen methodology to the proposed practical task, justifying the result obtained	Consistent, logical and correct justification of scientific principles and the applied methodology and technology, literacy, compliance with the norms of scientific language, 1-2 inaccuracies in the presentation of the material are allowed that do not affect the generally correct	3-4 inaccuracies in the use of conceptual material, minor errors in generalizations and conclusions are allowed, which do not affect the good overall level of task completion.	Conclusions on the applicability of substantiated scientific provisions are vague and unconvincing; there are stylistic and grammatical errors, as well as inaccuracies in processing the results of a practical solution	The task was completed with gross errors, the answers to the questions were incomplete, the conceptual material and argumentation were poorly used.	The task has not been completed, there are no answers to the questions posed, materials and analysis tools have not been used. Violation of the Rules for Conducting Final Control

	conclusions (+ visualization of the results of the justification through graphical data).				
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