Learning transfer from the business communication classroom to the workplace

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Learning transfer from the business communication classroom to the workplace

by

Danica L. Schieber

A dissertation submitted to the graduate faculty
in partial fulfillment of the requirements for the degree of

DOCTOR OF PHILOSOPHY

Major: Rhetoric and Professional Communication

Program of Study Committee:
David R Russell, Major Professor
Charles Kostelnick
Geoff Sauer
Margaret LaWare
Danny Johnson

Iowa State University
Ames, Iowa
2016

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DEDICATION

I would like to dedicate this research to all of my students.

I would also like to dedicate this to Alex, Roland, and Juliet.
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ABSTRACT

This dissertation is a longitudinal study, following business majors from a business communication class to their new workplaces to see if they are able to transfer learning from one context to the next. While many studies have analyzed possible instances of transfer, few studies have followed students from the classroom to the workplace, and very few have specifically worked with the population of business majors. This study analyzed participants’ writing and reflective work using a case study qualitative methodology, informed by Grounded Theory, Legitimate Peripheral Participation, and Activity Theory.

A significant finding of this study is that one of the participants was able to directly transfer some rhetorical skills and genre knowledge from the business communication classroom to his new workplace, and use it effectively. He showed that high road transfer can be achieved if the participant is highly motivated to do so. In some cases, participants showed a developmental trajectory of learning, where they practiced and developed these rhetorical strategies during the semester, and were then able to use them effectively later in their jobs/internships. Specifically, participants were able to develop audience awareness, specific genre knowledge, and professional writing styles even further in their new contexts.

One of the key findings in this research study is the importance of three factors that may help promote an environment that is conducive to transfer of learning: knowledge of how a community of practice works, participants’ self-identity, and gradual fuller participation within the community. However, participants who did not have access
to that knowledge, did not identify with the new community, and were not encouraged to participate more fully within the community had a challenging time transferring learning to those new communities and actually becoming a part of them.

I argue that instructors and researchers may need to reassess the way we study about and define transfer, or we may disregard some learning developments that are occurring right in our writing classrooms. Implications and recommendations are discussed.
CHAPTER I
INTRODUCTION: THEORY AND LITERATURE REVIEW

Background

This study came out of a discussion that I had with the Dean of the College of Business here at Midwestern University. As we discussed the possibility of creating a linked course between the College of Business and the English Department (similar to a learning community), I realized that I wanted to be able to measure if this course would be successful in training business majors to communicate effectively in their future careers. But, I found myself unsure how to measure that kind of success. The typical kind of assessment (test scores, grade averages, etc.) didn’t seem appropriate, as writing is such a situated activity. Effective business communication can’t be adequately measured by testing vocabulary words or vague business communication concepts that are used outside of context. I wanted my students to understand that business communication is about understanding audience and writing for that audience. How would I know if students were actually able to use this learning effectively when they went to their new jobs?

This study came out of that discussion. I wanted to find some way to follow students from my classroom to their new jobs to see if they were able to transfer any learning from the activity system of the classroom to the next activity system that they would encounter. However, transfer can often be very difficult to study because researchers disagree on what actually counts as transfer. What would I actually be
looking for? I wanted to see if I could better help our field understand transfer theory, even in this limited way. I was interested to see how this might change the way that I and other instructors address and teach various concepts in the classroom, as well as how researchers might study transfer in the future.

We can see from the literature that the population of students who take business communication courses is of interest to many organizations, like the Association for Business Communication (ABC), and journals like Business and Professional Communication Quarterly (BPCQ). Many studies have focused on how students learn various skills in the business communication classroom (Grant, 2004; McPherson, 1998; Ortiz, 2013; Reinsch & Shelby, 1997; Rubin, 1996; Vogt, Atwong, & Fuller, 2005) and pedagogical approaches for the business communication classroom (Greenwood, 1993; Rogers & Rymer, 1998; Saunders, 1997; Sharp, 1995; Stevens, 1996). However, I know of no studies that have followed business majors only from the business communication classroom to their new workplaces to see how they are able to transfer learning from one activity system to the next. Similarly, while many studies address how to promote transfer in the classroom (Blakeslee, 2004; Bourelle, 2012; Conrad, Pfeiffer, and Szymoniak, 2012; Keifer and Leff, 2008; Remley, 2009), very few studies have analyzed the specific factors that may influence successful transfer for business majors. This study attempts to fill that gap, and to add to the existing conversation on transfer of learning.

**Transfer**

Successful transfer of learning from one context to the next is typically the goal for instructors, whether it is transfer from class to class, or from class to career, or simply transfer of critical thinking or civic life. Although there are many different definitions and
descriptions of transfer, here I use Haskell’s definition of transfer (also used by the Elon Statement of Writing Transfer): “Transfer refers to how previous learning influences current and future learning, and how past or current learning is applied or adapted to similar or novel situations. Transfer, then, isn’t so much an instructional and learning technique as a way of thinking, perceiving, and processing information” (p. 23).

As instructors, we want our students to be able to take what they have learned in our classes and use it when they get to their next writing (or similar) situation. Many scholars have studied the transfer of writing skills from one classroom to another in various contexts, from composition studies to professional and business communication studies (Artemeva, 2009; Dyke Ford, 2004; Downs and Wardle (2007), Yancey, Robertson, & Taczak etc.). Some researchers have analyzed class assignments that integrated discipline-specific writing genres into their writing courses (Dyke Ford, 2004; Artemeva, Logie, & St-Martin, 1999). However, few studies have followed students from the classroom to their new jobs to see how (or if) they are transferring skills, and how they handle new situations once they are in their new workplace. Similarly, while some studies have followed engineering students (Dyke Ford, 2004; Winsor, 2004), very few studies have followed the specific population of business major students. Moore (2012) calls for researchers to explore the uncharted areas of transfer research by asking, “How do complementary, parallel, and intersecting activity systems impact students’ shifts among concurrent activity systems, as well as from school to professional activity systems?”

This dissertation is a longitudinal study, and will follow students from the business communication classroom to their new workplaces to see what factors effect
how well participants do or do not transfer knowledge, and if students are able to transfer or develop learning or rhetorical strategies from one activity system to the next. I will be using a triadic theoretical framework: Legitimate Peripheral Participation (LPP), Activity Theory, and influenced by Rhetorical Genre Studies. LPP (Lave and Wenger, 1991) is a situated learning concept that helps researchers better understand the process where novice learners enter a new community of practice (CoP) like the workplace, and participate first on the periphery, but as time goes on, they become full members of their new CoP. Activity Theory gives us insights about how learners participate within an activity system (typically an organization or group, like school or a job site). Activity Theory gives researchers the ability to analyze the members of activity systems, and the rules, members, and tools that are involved within them. Rhetorical Genre Studies helps us understand how genres are socially motivated, and in flux. These theoretical approaches are discussed further in this chapter.

**Literature Review**

Many scholars have studied the transfer of writing skills from one classroom to another (Wardle, 2007; Dyke Ford, 2004; Nowacek, 2011, etc.). However, very few studies (Brent, 2012; Dias et al, 1999; Lentz, 2013) have followed students from the classroom to their new jobs to see if and how they are transferring rhetorical writing strategies and learning, and the factors that may be involved in that process. Brent (2012) found that his students (some were business majors) were able to effectively transfer rhetorical strategies that they learned in university coursework when they got to their co-op internships, but were not able to attribute it to one particular course.
Dias et al (1999) followed participants from various fields, law, business, and architecture, and found that the classroom, because of its situatedness could never really replicate the activity system of the workplace. They noted that for business students, courses like business communication often use things like case studies to encourage students to think about business situations that they may experience in their future careers, but because case studies are merely abstractions from the real business environment, they can only show simplified versions of situations. The authors argue that social relations in workplaces are more complicated than that of university classrooms.

Lentz’s (2013) study was unique, in that she worked with MBA students who reflected on their own writing practice in their new workplaces, and completed a SWOT analysis of their own work. She encourages instructors to help students get into the habit of careful writing (through practice) rather than specific skills that they could then transfer from school to work.

Theory

Traditionally, transfer theory for the individual has been dominated by the field of cognitive psychology. Early research includes work by Thorndyck (1924) who came up with the idea of participants being able to transfer effectively if the two contexts had “identical elements.” Later, in 1939, this was challenged by Judd who followed a theory of general principles, arguing that the students who had a knowledge of general principles were able to learn more quickly than those who did not. This idea was later used similarly by Bereiter (1995), who discussed a dispositional view of transfer, as a way of transferring habits of mind. More recently, researchers Perkins and Salomon (1988) used the terms high road and low road transfer to distinguish between the types of transfer that
they analyzed. Low road transfer (also referred to as near transfer) refers to transfer which occurs between similar situations, where the transfer of skills or learning is easily seen and achieved. High road transfer (or far transfer), however, is more abstract and happens between situations that are different from each other. High road transfer is more difficult to attain, simply because it requires more effort to achieve in those different situations. Perkins and Salomon (1988) argue that learners need to be aware of their surroundings and to be mindful or reflective of what they are learning to encourage this high road transfer to new situations, like the workplace. The two researchers came up with two techniques to help instructors “teach for transfer”: hugging and bridging. Hugging refers to introducing material with as much context as possible (within the situated constraints of the classroom), to better prepare students for low road transfer. Bridging helps promote high road transfer, by encouraging students to make generalizations about different contexts on their own. Perkins and Salomon (1988) and other cognitive psychologists focus completely on the individual’s learning, while other approaches discuss the communities of practice (Legitimate Peripheral Participation) or activity systems (Activity Theory) that the individuals participate within.

**Various approaches to studying transfer**

Some researchers analyze transfer with the situated/socio-cultural approach (like LPP). This approach does not focus on what is transferred from one task to another, but instead on the patterns of participants in new situations. The participants learn new skills, and depend upon tools or artifacts to help them accomplish these new tasks. So, for participants to achieve transfer, “instruction should influence the activity so that it includes attention to affordances that are invariant across changes in the situation and that
will support successful interactions in situations that have been transformed” (Tuomi-Grohn and Engestrom, 2003, p. 26). These patterns will help participants know what to do in new situations. This particular pedagogical approach is most often seen in the apprentice and master work situation, where the apprentice is actually practicing his/her craft for a real purpose (acquiring a job in that field). The two work closely together, and the learning environment is focused on participation of the apprentice, under the watchful eye of the master. The apprentice will participate by actually practicing the craft, and will slowly continue to improve, until he/she is able to complete the work on his/her own. The apprentice can easily transfer these skills, because he/she is already using those skills in the same situated environment. The learning environment is also the work environment. Here, as in many situated learning schemas, the focus is on the individual’s learning only, which is a drawback of this particular approach. It is very difficult to replicate this type of setting in a classroom.

In a more community-based approach (Activity Theory), King Beach (2003) discusses the concept of “consequential transitions” as a way to look at and describe transfer (p. 3). In this process, Beach (2003) focuses on the “changing relationship between individuals and sets of social activities” (p. 3). This can involve many different processes. The locus of learning then is not on the individual, but more so on the communities that surround the individual and that he/she participates within, whether legitimately or peripherally. The organizations or communities and those who participate within them are constantly changing and moving, so participants also change within them. This experience becomes a transformation for the participant, who becomes part of the community based upon his/her experiences. However, for these transitions or changes
to become actually consequential, the participant must be able to reflect upon them, or is somehow changed because of them. Somehow, the relationship is changed.

Freedman and Adam (1996), during their research in “Learning to Write Professionally: ‘Situated Learning’ and the Transition from University to Professional Discourse,” drew on two qualitative studies to focus on how individuals learn to write in the university and in the workplace. The authors noted that the interns they studied were fortunate in that they received extensive feedback from the institution they were working for, and noted that all comments interns received were collaborative and not evaluative. This gave them the opportunity for further learning as they revised their work based upon those comments (though not all took advantage of said comments).

**Past studies on transfer from one context to the next**

In past studies, researchers found that students did seem to transfer some rhetorical skills. Artemeva, Logie, and St-Martin (1999) explained how a form of transfer can be achieved when a course (in this case, engineering) is tied to disciplinary activities that students will use in their future engineering communities. Artemeva et al note, “By introducing these assignments, we are attempting to equip students with skills and strategies that can be applied to their other engineering courses and that will facilitate their transition to the workplace” (313).

Artemeva (2009), in her study with engineers, found that rhetorical practices can be taught in communication courses that are discipline specific. She found that her engineering students were able to transfer genre knowledge from the classroom. She argued that her 4 case studies show that RGS, AT and situated learning can be put into one theoretical framework, and shows that learning professional genres does not occur in
a smooth, uninterrupted way which starts in the communication classroom and continues throughout the engineering program. Artemeva (2009) lists the following as integral for formation of professional genre knowledge:

(a) agency, as reflected in the novice’s ability to both seize and create *kairotic* moments in the chronological flux of time, respond to the proportionally, and enact genres in the ways that are recognizable by the community of practice; (b) cultural capital; (c) domain content expertise; (d) formal education; (e) private intention; (f) understanding of the improvisational qualities of genre; and (g) workplace experiences (p. 172).

Similarly, Brent’s study (2012) followed 6 students through a co-op work term to look at the resources that students draw upon when asked to write in a new work environment. The students were from a range of majors and backgrounds (some were business majors), and were placed in an internship position in the local area. Brent (2012) found that the students drew on a wide range of internalized rhetorical strategies learned from across their academic experience. Most students demonstrated good rhetorical strategies when faced with an unfamiliar communication task. Brent (2012) also found that most participants at least referenced audience awareness. Brent (2012) concludes, “if we can help them become more conscious about what to observe and what questions to ask in new rhetorical environments, we will have gone a long way toward helping the transform, if not simply transfer, this knowledge” (p. 590).

Freedman and Adam (1996) found that participants learned very similarly in the classroom and in the workplace. In both contexts, the learners learned by participation
(often writing). However, the purposes of each context were dissimilar. In the classroom, the purpose is to learn. In the workplace, the purpose was to advance the company or organization.

In many of these studies, the coursework that participants took seemed to help students learn and practice specific skills. In many cases, this learning had to do with rhetorical strategies or rhetorical practices, but not many were able to attribute specific transfer of learning to one class. The fact that these researchers found that students were mainly able to transfer rhetorical strategies only, suggests the need to follow a small group of students to see if they are able to attribute learning to a classroom experience.

Research question 1

Through what school experiences did students report or appear to have learned and developed the rhetorical strategies they used?

Transfer from other contexts

However, there may be some skills or strategies that students learned apart from their classroom experiences. In some cases, participants noted that they learned some rhetorical skills in places other than the classroom, and were able to utilize the when needed. Smart and Brown (2002) observed a group of interns and noted that they “transformed” prior knowledge rather than transferred it. They did have to learn new skills in their new contexts, but were able to use a wide variety of strategies to do so. These strategies that they used came from a variety of places.

Roozen (2008, 2009, 2010), in his studies, was able to analyze the types of learning that students were transferring from other contexts to their school writing assignments. He notes that students’ writing tasks are influenced by many different
practices and activities, including many that are not school related. One participant used strategies from stand-up comedy, another from a prayer journal from a church youth group, and another participant used strategies from writing fan fiction. Roozen argues that “we need to situate the full range of basic writers’ literature engagements into our research and teaching” (2008, p. 5).

In many cases, participants note that they learn new knowledge and skills on the job. Winsor (2004), in her book *Writing Like an Engineer* focused on the social nature of communication: “The textual construction of knowledge is social in nature because each document must convince other people of its validity in order to be accepted as knowledge. Only documents that do convince others are used” (p. 60). While her four engineer participants did not feel that the writing they did was persuasive in nature at the beginning of her study, they later realized as they became more a part of the engineering community that they were in fact writing to both inform and persuade. Much of this process was learned during their new jobs/internships, as they communicated more and more within their new communities.

In her study, Beaufort (2007) noted that students were in fact able to use rhetorical skills, but did not seem to see a connection between classroom assignments and work they would later do in their jobs. It is not clear how much of what participants learned came from other experiences, outside of the classroom. As Roozen (2010) notes, it is important for researchers to analyze the kinds of learning that may have come from places outside of the classroom. The fact that very few researchers have found any evidence of transfer from nonacademic experience suggests the need for more research in this area.
Research question 2

Through what nonacademic work experiences did students report or appear to learn and develop the rhetorical strategies they used?

Factors involved with the study of transfer

While many studies have focused on transfer of learning, some researchers tend to have a more negative view of transfer, and some have a positive view. It also seems as though there are many factors that may influence how and how well a participant is able to transfer in a new context.

Negative view of transfer

There have been some studies that analyzed if students were even transferring knowledge from one situation to another, as some researchers wondered if that transfer was even occurring (Dias et al, 1999). Some researchers have found that students had trouble seeing similar writing tasks as similar when they were in dissimilar contexts (McCarthy, 1987; Doheny-Farina, 1989.) Dias et al (1999) in their book *Worlds Apart* argued that the two activity systems of school and work were so far apart that one really could not prepare students for the other. They note, “We can argue that both activities can function effectively in their respective systems without necessarily bridging their two worlds” (223).

Another study found that even when students were put in a situation that mimicked the context of the workplace (e.g. wearing professional clothing when giving a class presentation), it still did not emulate a work environment (Freedman, Adam, and Smart, 1994). Part of the problem, according to Conrad, Pfeiffer, and Szymoniak (2012) in their research with Civil Engineering students was “that practitioners and students exhibit a fundamentally different view of writing: practitioners see writing as integrated
with engineering content and practice, whereas students view writing as separate from engineering” (1st page of doc). These contextual differences may hamper the success of transfer.

Not only are the two contexts of school and work completely different, but Dias et al (1999) also note that students may face difficulties in their new communities (of work): “Student interns and newcomers are unlikely to gain easy or immediate access to what may pass for ‘common knowledge’ within workplace communities” (226). This understanding takes time and practice when joining a new Community of Practice, especially for recent graduates who are mostly used to the context of school.

In her study of four writers within a nonprofit organization, Beaufort (2007) noted the participants possessed some awareness of rhetorical situations, but “saw little connection between the school and workplace writing situations” (183). Beaufort (2007) noted that participants must also employ broad mental schemas which allow a participant to solve problems in new writing situations:

The literature on expertise suggests that experts not only have very rich, deep, context-specific knowledge, but they also have mental schema, or heuristics, with which to organize knowledge and aid problem-solving and gaining new knowledge in new situations. So the question becomes, what knowledge domains best represent the mental schema employed in expert writing performances? And what knowledge domains—or mental schema—do writers need to invoke for analyzing new writing tasks in new discourse communities? If we can articulate these knowledge domains and apply them to shaping curriculum, we can then contextualize writing instruction more fully and have a basis for teaching for
transfer, i.e. equipping students with a mental schema for learning writing skills in new genres in new discourse communities they will encounter throughout life (p. 17).

In some situations, participants may actually utilize “negative transfer.” Nowacek (2011) discusses negative transfer, defining it as “the inappropriate application of prior learning” (p. 37, Nowacek). Beaufort (2007) similarly notes that negative transfer is used when “the norms of one discourse community were inappropriately transferred to a very different context for writing” (p. 183). These frustrating instances of negative transfer may be down heartening for researchers and students, but there are also many instances of positive transfer.

Positive view of transfer

Some researchers, like Nowacek (2011) take a more positive view of this complex process. Nowacek (2011), in her book “Agents of Integration,” suggests that transfer is not simply a cognitive act, but a rhetorical one that involves both seeing connections and presenting them to the instructors who support them. This shows the challenges that students face as they try to become agents of integration. Student can become “agents of integration” when they are “actively working to perceive as well as to convey effectively to others connections between previously distinct contexts” (p. 38). In this way, transfer is a rhetorical act in that students can recontextualize what they have learned in different contexts. Nowacek (2011) describes 5 principles of Transfer as Recontextualization:

**Principle 1**: Transfer understood as recontextualization recognizes multiple avenues of connection among contexts, including knowledge, ways of knowing, identities and goals.

**Principle 2**: Transfer understood as recontextualization recognizes that transfer is not only mere application, it is also an act of reconstruction.
**Principle 3**: Transfer understood as recontextualization recognizes that transfer can be a both positive and negative and that there is a powerful affective dimension of transfer.

**Principle 4**: Transfer understood as recontextualization recognizes that written and spoken genres associated with these contexts provide an exigence for transfer.

**Principle 5**: Transfer understood as recontextualization recognizes that meta-awareness is an important, but not necessary element of transfer (pp. 20, 25, 26, 28, 30).

Other researchers, like DePalma and Ringer (2011) coined the term Adaptive Transfer, which is the “conscious or intuitive process of applying or reshaping learned writing knowledge in order to help students negotiate new and potentially unfamiliar writing situations” (p. 135). They note that not only is this process possible, but can and should be encouraged by instructors of writing.

It seems that there are some contexts wherein students are able to transfer from school to work. In Smart and Brown’s (2002) “Learning Transfer or Transforming Learning? Student Interns Reinventing Expert Writing Practices in the Workplace,” they suggest that although students struggle transferring skills from the classroom to the workplace, they can learn the new rhetorical writing strategies of their new workplace relatively quickly. Smart and Brown used the term “transforming” knowledge, instead of “transfer” to explain that their students were using a wide range of rhetorical skills to change or adapt their writing knowledge to those new situations. Smart and Brown (2002) preferred the term “transforming,” as they noted the individual was changing or becoming a member of their new community, and not simply “transferring” a set of skills to a new situation.
Factors in composition studies

Many researchers turn to Composition studies to build on studies that have focused more on transfer from classroom to classroom. In Composition studies, many researchers like Downs and Wardle (2007) noted that a common misconception in First Year Comp (FYC) is that writing abilities just naturally transfer to other situations. Similarly, McCarthy (1987) and Bergmann and Zepernick (2007) found that their participants felt that that writing in first-year composition was very different than writing in their disciplines. Downs and Wardle (2007) argue that "far transfer" (Perkins and Salomon, 1988) is difficult and that First Year Composition (FYC) needs to teach it more explicitly. Downs and Wardle (2007) and Wardle (2007) encouraged the use of reflective assignments to help students with metacognition, to reflect upon what they were learning.

Classroom activities to foster transfer

Some studies suggest ways that teachers can implement or encourage this transfer from the classroom to the workplace. Blakeslee (2004) claims that professional writing projects and assignments can “act as useful transitional experiences for our students: students can get a taste of workplace writing practices while still having the guidance and support of their instructor and classmates” (p. 190).

In Kiefer and Leff’s study (2008), “Client-based Writing about Science: Immersing Science Students in Real Writing Contexts,” the authors argue for a client-based curriculum that focuses on writing for a real audience. Similarly, Terttu Tuomi-Grohn (2003) found that client-based projects in nursing internships provided a helpful collaboration between the two activity systems of the university classroom and the
workplace “to develop new theoretical concepts and to apply them to solve everyday practical problems” (p. 226). She noted that the key was the successful collaboration between the two activity systems, as well as the creation of shared boundary objects (e.g. health forms, and craft activities) which were collaborated on by members of both activity systems.

Blakeslee (2004) encouraged instructors to assign students client-based/workplace writing assignments to help students acclimate to writing for a real audience. She found that these types of writing assignments served as “a bridge between school and work” (169). She analyzed the four issues of exposure, authenticity, transition, and response when assigning client-based writing projects to measure their effectiveness, concluding that they can be very helpful experiences for students and can be an effective way to teach workplace genres.

Remley (2009), in his study, “Intersectional Computer-Supported Collaboration in Business Writing: Learning Through Challenged Performance,” encourages instructors to assign problem-based writing assignments. He argues that these kinds of assignments are similar to those that they will come across in their future careers, and that practicing collaborative writing assignments with computers will help prepare students for their careers.

Bourelle (2012) suggested that teachers could implement courses that “bridge the gap” between service learning and internships. The course specifically prepares students for internships with non-profits, and helps students understand writing for a specific audience, but also shows students how to be more socially aware.
Conrad, Pfeiffer, and Szymoniak (2012) found in their study that engineer practitioners see writing “as integrated with engineering content and practice, whereas students view writing as separate from engineering” (1). The authors encouraged teachers to 1) reinforce the importance of writing, even at the beginning of the engineering program, 2) show students how writing should meet the needs of their audiences, 3) give clear organization guidelines, 4) show examples of effective writing and discuss them, and 5) show students that correct spelling and grammar help build credibility. The authors noted these tips could help students transfer skills to their next class and to their future careers.

In their work, Kain and Wardle (2005) noted that just teaching genres apart from context may not help transfer, but teaching students to research genre use via activity theory as a way of encouraging transfer will. They encourage instructors to teach students the ability to assess contexts and identify related genres, evaluate the ways that genres mediate those contexts, and determine the role of generic conventions in that mediation. Students can then use activity theory to identify the variables in workplace settings. Carolyn Miller, in her work with Rhetorical Genre Studies (RGS) looked at genre, not as static forms, but as fluid and as social action (Miller 1984). Genre also helps us decide how we react to certain situations, and how they identify to those situations. Students, when they get to their new workplaces will need to learn “how to participate in the actions of [this new] community” (Miller, 1984, p. 165).

It is apparent that there may be many factors involved in how students are able to effectively transfer from context to context, and that the various approaches to studying transfer help to look at different aspects of it. Although we have many helpful articles
that discuss how teachers can promote this transfer, it is not clear which other factors may be involved in that process, or how a specific student population may be affected. It is possible that business majors may have a different experience than those who are mentioned in the previous studies.

Research question 3

Which factors within the various activity systems influence students’ abilities to effectively transfer learning/rhetorical strategies from the business communication classroom to the workplace?

Dissertation overview

This dissertation is organized into 8 chapters. This first chapter discussed the background of the study and the issue of transfer. Chapter 1 is also a comprehensive overview of the pertinent literature on the topic of transfer, which shows the gap that this study addresses. Chapter 2 details the methods that I use in this study. Chapters 3-6 are case study chapters that detail the various analyses of my four participants’ work all the way from the classroom to their new workplaces, with one chapter per participant. Chapter 3 details the work of Sally, Chapter 4 is on Beyoncé, Chapter 5 is on Annie, and Chapter 6 is on Sam. Chapter 7 is a detailed discussion that looks at the various factors that effect how well participants are able to transfer learning, and compares some of the experiences that my participants faced. Chapter 8 concludes the study and offers implications and recommendations for instructors and researchers, and gives opportunities for future research.
CHAPTER 2

METHODS

In this chapter, I first describe the methodology behind a two-part study. The first part, which is split into four case studies, is an analysis of the rhetorical strategies that my participants used, as well as an analysis of their possible “Transfer Talk” (Nowacek, 2013). I analyzed their documents from my business communication course, from the beginning of the semester to the final project, and then followed their written communication in their new internships or jobs. I then provide context for my research, including the theoretical frameworks informing my methodology, my positionality as a researcher, and the processes for collecting and analyzing my data.

For this study, I employ a qualitative approach, using Grounded Theory as well as Legitimate Peripheral Participation (LPP) and Activity Theory to analyze if students are able to transfer learning from the classroom to their new workplaces. I also use a Case Study qualitative method, as it involves a detailed description of the setting and the individual, followed by analysis of data for themes that emerge (Stake, 1995; Wolcott, 1994). As Stake (1995) notes, “The name ‘case study’ is emphasized by some of us because it draws attention to the question of what specifically can be learned about the single case” (p. 443). It seemed appropriate, as case studies are often characterized by the researcher spending quite a bit of time with the participants in the site (in my case, in the classroom), and encourages reflection and revision to understand what is happening with the participants (Stake, 1995, p. 450). Also, there are five requirements of case study
research: “issue choice, triangulation, experiential knowledge, contexts, and activities” (p. 444). The issue of transfer between the classroom and the workplace came out of the literature (please see Chapter 2), and I found that there were very few studies that followed business majors from the business communication classroom to their new jobs.

To get a better sense of how my participants were able to transfer across contexts, I triangulated by collecting a range of data, including multiple assignments, two screencasts recordings (reflections on assignments), and feedback from the instructor and supervisor. This was also a clear example of experiential knowledge, as I was able to get to know my students and their writing, and to be a part of the activity system of the classroom. This gave me a better understanding of my own participants, and how they write in new contexts (classroom and workplace), as well as the activities that they were a part of that may have influenced how well they transferred learning.

I also use Grounded Theory by Corbin and Strauss (1995), as I did not want my findings to be limited by the set coding categories. As the authors note, “Grounded theory is a general methodology for developing theory that is grounded in data systematically gathered and analyzed. Theory evolves during actual research, and it does this through continuous interplay between analysis and data collection” (Strauss and Corbin, p. 273). I chose this theory, because it also takes into account that our participants have many perspectives and there are many interpretations of their actions and words.

Originally, I decided to use Grounded Theory as a way to explore the themes that emerged from the data. Some may say that it is more effective to use Grounded Theory only (Glaser and Strauss, 1967); however, I argue here that it is necessary to use existing theory (LPP) as well, as it was used effectively by other researchers who have researched
similar studies (Dyke Ford, 2004; Nowacek, 2011), and my findings could further our knowledge of this theory, by possibly adding categories that better connect findings. It is difficult to add to our field’s knowledge of existing theory by starting over. Therefore, I use both Grounded Theory and Activity Theory and LPP used by Nowacek (2011) and Dyke Ford (2004) to explore how students may be able to transfer learning from one activity system to the next, and to measure their trajectory of their learning.

**Theoretical Frameworks**

The frameworks that influenced my work in both parts of this project were Lave and Wenger’s (1991) Legitimate Peripheral Participation (LPP), and Activity Theory, with some influence from Rhetorical Genre Studies. I describe each in further detail below.

**Legitimate peripheral participation**

In this study I will be using the concept of Legitimate Peripheral Participation (LPP) as a way to understand learning, or as Lave and Wenger (1991) describe it, “as a claim about the common processes in the production of changing persons and changing communities of practice” (p. 55). *LPP* is a concept created by Lave and Wenger (1991), which describes the process whereby novices are only able to participate on the edge (or periphery) of a new community of practice. As time goes on, and they communicate and participate more in that community, they eventually become full members. Lave and Wenger (1991) situate learning by mentioning, “Peripheral participation is about being located in the social world. Changing locations and perspectives are part of actors’ learning trajectories, developing identities, and forms of membership” (p. 36). This situated learning framework is helpful for us to analyze how novices learn to participate...
within their new Communities of Practice. It is important for employers to keep this in mind as they work with a new employee, so their expectations are not unreasonable. These transitions to new communities take time and patience.

**Activity theory**

The second approach uses Activity Theory, which focuses on how learners function within activity systems (Russell, 1995). Within an activity system, “Activity is oriented at a culturally significant object which also forms the motive of the activity” (Tuomi-Grohn and Engestrom, 2003, p. 28). Activity systems can include many organizations and groups, like a classroom at a school, a workplace, or job site. The participants of the activity system produce actions, which are aimed to reach a certain goal. Each activity system has rules, members, and instruments or tools, similar to the way a community works in a community of practice. Participants in the activity system learn by taking part in the activity, as well as in the community; “This means that learning is distributed in an object-oriented activity system, mediated by instruments, rules and division of labor” (Tuomi-Grohn and Engestrom, 2003, p. 30). Therefore, learning takes place through “interaction between collective activity systems” (Tuomi-Grohn, Engestrom, and Young, 2003, p. 4). Often, workplace activity takes the form of writing, and participants learn how to take part in the activity by taking part in workplace writing. While much writing is learned on the job/activity system, we still need to prepare our students to participate within that activity system while in the activity system of the classroom.
Rhetorical genre studies

The third approach to learning transfer is Rhetorical Genre Studies (RGS). In RGS, genre is looked at as social action, and allows researchers to study genres beyond just the text upon the page and to analyze the context surrounding the text and how the two change one another. RGS notes that genres are not static boxes, but are fluid and change with each situation. Russell (1997) suggests that writing regularly in a specific genre is an example of how a complex action, with repeated use overtime, becomes natural. Researchers like Artemeva (2008) note that RGS can serve as a “useful, theoretical framework for research into genre development, learning, and use” (p. 159).

To take it a step further, and in a way combine the three approaches, with the “high road” cognitive approach, composition scholars suggest we teach students transferable conceptions of the activity of writing, including conceptions of genre, rather than just "basic" writing skill and formulaic genres, as well as assigning them frequent reflective assignments, so they can think about the contexts (activity system and community) they hope to enter and achieve an expanded identity within. Scholars like Downs and Wardle (2007) note that instructors who assign reflection after a major assignment are encouraging metacognition in their students, who may be more aware of the rhetorical strategies that they used and better able to apply them to new writing situations.

Researcher Positionality

Here I take the opportunity to describe my researcher positionality within my own study. I was a participant within this study, as a teacher researcher. Many teacher-researchers remind us of the importance of self-reflexivity and self-representation in this
type of research (Fecho, 2003; Fleischer, 1995). This use of self-reflection and a focus on one’s positionality within their research helps to counteract one’s biases (Blakeslee and Fleischer, 2007). It is also important to be mindful of how our position is one of power over our participants in this type of research, and to be critical of our own words and actions when interacting with our participants. We do not want to put our participants in a position where they feel that they have to please us. A benefit of the teacher-researcher paradigm is it allows the teacher to learn along with her students, which is something I have endeavored to do here.

Kennedy-Lewis (2012) suggests that teacher-researchers should use self-narrative as a way to define one’s role as a participant-observer. Therefore, I would like to describe my own role here. As a teacher-researcher, I was a graduate teaching assistant in the English Department at the large Midwestern University. All data was collected during the 3rd and 4th year of my PhD program, after receiving IRB approval. I had previous teaching experience from teaching during my Masters program work, at Minnesota State University, Mankato.

Because I was the instructor for and creator of this linked course between the English department and the College of Business, I was able to easily access the assignments, prompts, and reflections for students who volunteered for this study. Cathy Fleisher notes that teacher research provides insights into classrooms and students that perhaps outsiders would have difficulty discerning. She argued, “Present day in and day out, teachers are able to observe classrooms in their fullness; they are able to observe their teaching and their students’ learning and to reflect productively in the relationships between teaching and learning” (88). My knowledge of my students has helped me
understand how they write and react to new situations. I am aware, however, that this
dual role could influence me when collecting data and analyzing student work for
evidence of transfer. I did have a better understanding of my students and their writing
processes and their past writing experiences, but, aware of my potential biases, I carefully
avoided all use of any prompts that may have seemed to be leading questions. For
example, I never asked my participants if they felt they had “transferred learning” from
any past experiences or asked them to describe their “rhetorical strategies.” Instead, I
endeavored to use more neutral language, like “How did you know how to do this? What
did you struggle with? How did you figure out how to solve the issue that you faced?”

I also endeavored to remediate biases that may have surfaced in this study by my
informant’s information and assistance, as well as the use of member-checks with my
participant. It is possible that participants may have tried to answer as they perceived I
wanted them to answer, which may have colored their responses. However, because I did
not collect data until after the course was finished, it is less likely that they were trying to
please me with their answers, as their grades had already been posted. However, as is
sometimes the case with teacher-researcher studies, it is possible that my participants
responded to my questions in a more positive way, in an effort to please me. I hope that
this was not the case here.

I also gave participants the opportunity to retract or re-record their screencasts at
any point during this study. I did not want my participants to feel as though their words
on their workplace screencasts could possibly affect them negatively in their jobs. While
this option was offered to each of my participants, none of them asked to. I also used
member checks at the end of the study to make sure that I didn’t include anything that my participants would rather not have included (from their course work or their workplace).

3 Analyses

For this first part of the study, I wanted to analyze my participants’ work to see which experiences helped them learn and develop the rhetorical strategies (possibly from the classroom to the workplace). To better understand how my students were (or were not) transferring learning, I performed an analysis of their use of rhetorical strategies, process strategy analysis, and an analysis of “Transfer Talk,” to better understand how my participants thought/talked about their own work.

My research questions that came out of the literature in this area are:

1. Through what school experiences did students report or appear they learned and developed the rhetorical strategies they used?
2. Through what nonacademic work experiences did students report or appear to learn and develop the rhetorical strategies they used?
3. Which factors within the various activity systems influence students’ abilities to effectively transfer learning/rhetorical strategies from the business communication classroom to the workplace?

Questions 1 and 2 will be answered in the following case study chapters on each participant, and question 3 will be answered in Chapter 7, Discussion.

Research Site

The site of this study was my business communication classroom (the linked course between the English department and the College of Business- please see Chapter 1). I chose this site because I had the opportunity to get to know these students and participate in class discussion with them. This allowed me to understand them better than I would have with a class that was not mine. I was also very interested in working with business majors. While many excellent studies have focused solely on students taking
business communication courses (Crews & Stitt-Gohdes, 2012; Fredrick; Grant, 2004; McPherson, 1998; Reinsch & Shelby, 1997; Rubin, 1996; Vogt, Atwong, & Fuller, 2005), few studies have focused on business majors only (Brent, 2012; Glaser-Segura, Mudge, Bratianu, and Dumitru, 2010). Pope-Ruark (2012) argues in her work on the Scholarship of Teaching and Learning (SoTL), “Therefore, identifying and understanding signature pedagogies in business communication may be an important aspect of maintaining the integrity of a discipline and shaping its future (p. 244). She goes on to say:

By systematically studying business communication students, workplace newcomers, and established workplace writers, we can effectively document which aspects of our curricula are most valuable and do the most to shape effective workplace writers. Studies such as these would allow us to connect theories of learning to workplace practice and vice versa, informing both the classroom and the discipline (p. 246).

She, and international organizations like the Association for Business Communication (ABC) and journals such as Business and Professional Communication Quarterly (BPCQ) encourage researchers and instructors to continue to study business communication students, and to explore how our findings may impact our classroom practices.

Informed by SoTL, I created this course after extensive interviews with the College of Business faculty members, to see what they felt their students needed from this class. This course was required, and enrolled only business majors (on a first-come,
first-serve basis), and was tailored to their communication needs. While the course was a basically typical business communication course, I did also bring in discipline specific examples to show my students, so they would better understand the types of writing that they would be expected to compose in their fields. The course followed the WOVE (Written, Oral, Visual, and Electronic) communication format that is unique to the large Midwestern University, and included multi-modal assignments and business-specific genres. Assignments included several oral presentations and screencast reflections after each major assignment. The final project for the course was a client-based writing project that included primary and secondary data collection, real deliverables, and a final report and presentation.

The following goals and skills/competencies were taken from my course syllabus:

“The goals of English 302 are to enable students to:

- Analyze common business communication dilemmas and their possible solutions.
- Adapt messages for context and audience.
- Organize and express information clearly and concisely.
- Produce professional written, oral, visual, and electronic communications (WOVE).

Skills/Competencies

After completing this course, students should be able to:

- Compose professional documents for a wide array of audiences and situations
- Revise, edit, and proofread business communication documents
• Apply basic document design principles
• Create visuals and data displays
• Gather and analyze data
• Utilize and document sources effectively
• Collaborate effectively within a group
• Deliver oral presentations clearly and effectively”

The goals and competencies are fairly common for most business communication courses. My main goal with this course was to teach my various business majors the basics of business communication, and to show them the kinds of writing that professionals in their fields actually do.

In my class, I like to have an open, collaborative learning environment, where students feel comfortable discussing and arguing ideas together. I encourage students to bring in various examples of business communication that they have found, and we often discuss and analyze them in class. We used a widely used textbook (Locker and Kienzler’s 2010 version of Business and Administrative Communication), which had many examples and exercises in it, and I would encourage students to discuss the various examples and argue over when and where various examples would be effective (or non-effective) in a work environment. We also discussed writing in their various fields, and analyzed examples from their specific business-related disciplines. While the class was a fairly common business communication class, I enjoyed working specifically with business majors, and being able to focus on the needs that they would have when they left the university and joined the workforce. In this way, I felt that I could focus on genres and topics that would be of most use to them.
Participant Selection

At the end of three different semesters, I passed around a sign-up sheet, asking if students would be interested in participating in the study. While I had over 20 students initially who were interested in participating in the study, they were eventually narrowed down to 4. Some of these former students were unable to participate because their internship/work supervisor was not willing to participate, or because they were working in a healthcare field, and HIPAA was an issue with the sharing of documents. Many possible participants had issues with private documentation, and were not allowed to share their documents with me. The four that were left were my participants listed below.

While my participants were a convenience sample, they were all volunteers, from across three different sections. It was helpful that they were all from my class, as it gave me a better opportunity to get to know them and how they write and communicate. I could have possibly recruited students from another instructor’s course, but students may not have been as willing to participate in a study with an instructor whom they did not know. Similarly, I would not have known them personally, and may not have been able to describe them in as detailed of a manner as their involvement deserved.

Also, it is interesting that of the 4 participants, 2 were Marketing majors, and 1 was a double major (Marketing and Finance). I would like to note that it is coincidental that 3 of my participants were Marketing majors, and that I had volunteers from across the 6 business majors offered in the college of business.

The following were my four participants (all names are pseudonyms):
**Annie**- Annie, a Marketing major, was an excellent student in my business communication class. Annie had taken some disciplinary coursework by the time she took my class, including several marketing courses and a supply chain management course, and was looking forward to finding an internship for the next summer.

When Annie wasn’t sure how to write something, she came to me to ask for clarification or looked for examples to emulate. She was slightly introverted, but actually ended up leading her group when they completed their final group client project. I was impressed that she came up with their client for that final project as well as became the group leader.

**Sam**- Sam was an agricultural communications major. He was very outgoing and always participated well in class. He was always prepared for class and had something helpful to add to the class discussion. He took this course his last semester before graduation. Sam had previously taken part in two internships with an agricultural company (in sales). Sam was very much an entrepreneur, and after graduation, he and two of his friends started their own Ag support/communications business. He and his two friends actually began planning this business while they were all undergraduates at the large Midwestern University. He joined the entrepreneur club on campus, and took courses that he knew would help him with the new business.

**Sally**- Sally, a Marketing major, was a very dedicated student, who always added to the class discussion. Sally was always prepared and was a very hard worker. She asked intelligent questions, and was very organized. Sally did very well when presenting
information in front of the class, and spoke confidently. She was a very careful student and used her resources well and was involved with various campus activities. She was (and is) a very kind person who worked patiently with everyone in her group. Sally also took this course as a junior.

**Beyoncé**- Beyoncé was a double major in Finance and Marketing. She was slightly introverted, but seemed to feel comfortable working with a small group. She was always prepared to work hard. Beyoncé was also a careful worker, and always double-checked her work before handing it in. She was very detail-oriented. Beyoncé also took this course as a junior, and went on to her internship the semester after she took my course.

**Data Collection Methods**

I chose to collect writing samples from my participants, because much of Business Communication is written communication, and as Dias et al (1999) note, “One medium through which separate minds come together in a system of minds is clearly written communication” (p. 32). To collect data from my participants, I used the Learning Management System (LMS) Moodle in our course. All of their assignments were handed in electronically through the LMS. The University’s LMS staff save and store the LMS data on the university server, so all of my participants’ data was safe and confidential, and allowed me to access their assignments for the purposes of this study after the semester was complete and final grades had been posted.

To keep my participants’ identities safe, I removed identifying characteristics from their assignments (locations, addresses, etc.), and changed their names to their pseudonyms. I did not keep a list of their real names along with their pseudonyms, but
instead simply memorized them. All data from my participants was kept safely on my password-protected, encrypted laptop.

When my participants were in their new internships/workplaces, I communicated with them via email. Each participant was able to email me their workplace screencast recording, which was a recording where they described to me the document they created. My participants were also able to email me feedback from their supervisor, all except for Sam, who did not have a supervisor. Each screencast was then carefully transcribed. I then removed any remaining identifying characteristics from the documents, and saved them on my password-protected, encrypted laptop. In the cases of Annie and Beyoncé, I was also able to either record or take notes on a conversation with their supervisors, so that conversation was transcribed as well.

**Data collected**

The study draws upon Scholarship of Teaching and Learning (SoTL) methods (Pope-Ruark, 2012), by using empirical research to analyze different pieces of data, including a collection of student work, and teacher notes/feedback. I chose to use several different assignments from the course, so I could see my participants’ possible uses of rhetorical strategies in different situations (from the beginning of the semester, and from the end), and a screencast reflection allowed me to get a different perspective on their work, as they were able to talk through their writing process, thereby allowing me an inside view of how they wrote. To see their movement across contexts and how they may have transferred learning/rhetorical strategies from one context to the next, I also collected data from their new jobs or internships. I was able to collect at least one writing sample (with feedback from their supervisors) from their new jobs/internships, as well as
a screencast recording where each participant described their new document with me. In the case of Annie, I was also able to collect a recording of Annie and her supervisor discussing the feedback she had received. I was also able to sit down and have a conversion with Beyoncé and her supervisor, which was also documented and analyzed for this project.

Each piece collected is described in more detail here:

**The Messages Packet** - The first major assignment from my Business Communication class was a messages packet with negative/positive messages for various audiences. Students were given a fictional situation, where they had to act as the manager and solve a mix-up in shipping. In the scenario, two products are mixed up and sent to the wrong customers. Students had to write documents not only to the customers, but also to the shipping manager, their supervisor, and draft a change in policy for the entire company, to prevent this mistake from occurring again. They had to give each audience member the information that they need, but they also had to decide the appropriate genre for disseminating that information, like email, memo, or business letter (assignment sheet located in Appendix B).

**The Screencast Reflection** - The screencast reflection on that assignment (I prompted them to answer a few questions including: How did this assignment go for you? Did you run into any issues? Where? How did you overcome them?). A screencast is simply a recording of a computer screen with a voice over. This technology allowed my students to scroll through their assignments while they were recording and to actually point out or highlight sections that they struggled with, explaining why or how they made the rhetorical choices that they did. Each screencast recording was approximately 3
36 minutes long, and created by using a free software (screencastomatic.com). These screencasts afforded my students the opportunity for reflective moments, which Lave and Wenger (1991) “argue further that this flow of reflective moments is organized around trajectories of participation” (p. 54).

**Instructor Feedback**- When I graded this first assignment, I recorded a Screencast giving students feedback on their Assignment #1 (the messages packet). Recording a Screencast with feedback allowed me to scroll through their first assignment, and give them verbal feedback, also highlighting areas that I wanted them to work on. I was able to use an informal tone when discussing student work, almost as though I were having a conversation with each of them. Going back over my feedback that I had recorded for my participants also allowed me the opportunity to be self-reflective in my feedback practices, and to see if I was responding in a way that focused on the course objectives in each assignment.

**Client Project**- This was the final project for the course. Groups were asked to find a real outside client who needed some kind of help with technical/business communication or documentation. Many groups ended up working with small, local businesses or non-profit agencies. Groups had to divide the work equitably, write a final report detailing their research and deliverables for the client, and present the information to their classmates at the end of the semester. For each participant I was able to either analyze the final report (Annie, Sally, and Beyoncé), or the proposal/progress report (Sam). (Assignment sheet in Appendix C).
From my students’ jobs or internships, I was able to collect the following documents:

**Draft of some kind of written communication**- These documents varied from participant to participant. Some participants shared articles or blog posts that they had written (Annie, Sally, Beyoncé), and some shared letters or memos (Sam). I was also able to see/read supervisor feedback on these drafts (for all except Sam).

**Screencast Reflection on that workplace document**- My participants used Screencast technology to share their documents with me and to also talk through them. Participants were able to describe how they wrote these documents and any issues that they had while composing them. This allowed me to get an inside view of how they composed new documents and how they were participating within their new jobs/internships. These documents were blog posts/articles (Annie, Sally, Beyoncé), or memo/letters (Sam).

**Discussion with supervisor**- For Annie, I was also able to collect a recording of Annie and her supervisor, as they discussed the feedback that Annie had received on her article draft. I was able to transcribe this data, and learn more about how Annie interacted with her supervisor.

**Discussion with Beyoncé and her supervisor**- During a visit with Beyoncé, I was able to visit her internship office, and sit down and have a discussion with her and her supervisor. While I was not able to record this discussion, I did take copious notes. This also allowed me to see how Beyoncé was involved with her new internship organization and how the office worked together.
Coding

For this study, I used case study qualitative research, searching for themes that come out of the data. I used this type of research hoping to discover new categories or instances of rhetorical strategies (in addition to those that have already been suggested by Dyke Ford, 2004 and Nowacek, 2013) that may help us better understand transfer.

I began by coding the instances of rhetorical strategies and process strategies in order to discover similarities and differences between the activity systems of school and work/internships. The categories that I used here are from Dyke Ford’s (2004) research, where she studied engineering students and how they transferred rhetorical skills to other classes. The rhetorical strategies that Dyke Ford (2004) used are features of writing that are commonly taught and graded by professional writing instructors, and were included in my assignment rubrics. I used Dyke Ford’s (2004) categories in this study because the two projects were very similar in nature; she was also analyzing how well her (engineering) students transferred their writing strategies from one context to the next. Dyke Ford’s (2004) work was also influenced by RGS (specifically looking at genres that engineering students use), but was also influenced by the cognitive approach of Perkins and Salomon (1988). According to Dyke Ford’s (2004) work, the categories of the rhetorical strategies are:

- Multiple audiences
- Varied audience needs
- Purpose
- Organization
- Style
- Professional appearance
Dyke Ford (2004) also used the category of “visual,” but that did not pertain to these particular document examples, so I omitted that. Here I have organized the categories, along with the descriptions that I used from my own rubrics:

Table 1: Rhetorical Strategies

<table>
<thead>
<tr>
<th>Rhetorical Strategy Categories</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Audience Awareness</td>
<td>The audience is well oriented from the outset. Document is clearly written with audience’s needs in mind.</td>
</tr>
<tr>
<td>Sense of Purpose</td>
<td>Clear and engaging articulation of context and purpose. Provides concise explanations for writing</td>
</tr>
<tr>
<td>Organization</td>
<td>Organization is appropriate to topic and emphasis; shows attention to audience needs: Reads smoothly and is easy to follow.</td>
</tr>
<tr>
<td>Professional Appearance</td>
<td>Document is formatted correctly and includes a date and appropriate opening and closing salutations; the visual appearance of the document is attractive and promotes audience accessibility.</td>
</tr>
<tr>
<td>Style</td>
<td>Style is particularly well suited for topic and audience: Writing is clear, fluid, and mature. Precise and appropriate word choice.</td>
</tr>
</tbody>
</table>

Secondly, I coded for process strategies, which could better show the processes that participants used to write new documents. Artemeva (2009) notes that it is imperative to understand the processes through which learning occurs as a participant moves from the classroom to the workplace (160).
The two process strategies that emerged (from open coding) were:

Table 2: Process Strategies

<table>
<thead>
<tr>
<th>Process Strategy</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Invention</td>
<td>Brainstorming, or coming up with ideas. E.g. “So, I did some brainstorming to figure out what to do.”</td>
</tr>
<tr>
<td>Weighing Options</td>
<td>Trying to choose between various options. E.g. “I wasn’t sure which option to go with…”</td>
</tr>
</tbody>
</table>

However, as I went through the process of analysis, very little came out of the data that had to do with my participants’ process strategies. I decided later to abandon that section of the analysis. Instead, I focused more on my participants’ uses of rhetorical strategies and evidence of “transfer talk.”

I then coded for “Transfer Talk,” which is a phrase coined by Nowacek (2013) and defined by her as, “Any talk through which individuals connect knowledge, strategies, attitudes and (importantly for my purposes today), identities previously associated with an earlier context to a new context” (Elon conference presentation). Nowacek’s (2013) categories came out of her research, which was influenced by Lave and Wenger’s (1991) work on LPP. She noted that identity develops gradually, over time, and it may be possible to see evidence of identity shifts in the way that students talked about their writing. Nowacek’s (2011, 2013) work was also influenced by Activity Theory, and she looked most closely at the Activity Systems of school and of the interactions between tutors and their tutees in the writing center. While my analysis for transfer of rhetorical strategies was something that would help me to answer some of my
research questions, I realized that without some kind of analysis of my students’ own talk about themselves would be incomplete. Therefore, I decided to use Nowacek’s (2013) categories to better understand what was happening with my participants, off of the page, and how they felt about their own writing.

Nowacek’s (2013) coding categories on “Transfer Talk” are:

Table 3: Transfer Talk Categories

<table>
<thead>
<tr>
<th>Categories</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stories about themselves/Self-diagnoses</td>
<td>“I go on tangents”/or self-identity statements- “I am just a bad writer.”</td>
</tr>
<tr>
<td>I remember/ I was taught</td>
<td>E.g. “I learned to do that in my composition class.”</td>
</tr>
<tr>
<td>Statements of absolutes</td>
<td>E.g. “Memos are always one page.”</td>
</tr>
<tr>
<td>Gut feelings</td>
<td>e.g. “It just didn’t feel right.”</td>
</tr>
</tbody>
</table>

Data analysis

I began data analysis by annotating my participants’ documents from the beginning of the course, to the final project in the course, and finally to their jobs/internships. I began by color-coding the data for the various rhetorical strategies that Dyke Ford (2004) used in her study, and the two process strategies, for each participant, across all of their documents. I then created a table to organize all of the data that seemed to fit in those categories. The following is an example of the organizational table that I used:
Table 4: Annie’s coding organization

<table>
<thead>
<tr>
<th>Student: Annie</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Rhetorical strategies</strong></td>
</tr>
<tr>
<td><strong>Multiple audience</strong></td>
</tr>
<tr>
<td><strong>Variable audience</strong></td>
</tr>
</tbody>
</table>

After several iterations of combing through the data for any information that could be an example of those rhetorical and process strategies, I discussed my findings with my advisor. Throughout this process, I also sketched out the various possible instances of learning and developing these rhetorical strategies on large sheets of paper, and then compared each participant’s experiences with the others. I then organized the information into themes for each participant.

As I worked through this iterative analysis process, I was also writing analytical research notes. These notes allowed me to read through the literature, and reflect upon my findings with each participant. Writing notes on each participant and their analysis helped me to focus and explain the patterns that I found.

After I analyzed each document from my participants, I then focused solely on their screencast reflections, both from the class and from their jobs/internships. I wanted to get a better understanding of how they talked about their own writing and their writing
processes in the different communities. This helped me to code the data for any evidence of “Transfer Talk.” After coding, I separated the data into the “Transfer Talk” categories. I then wrote out many analytical research notes, to explore the data even further. I then used my theoretical frameworks to draw out themes for each participant, based upon their “transfer talk.” The significance of the themes is discussed further in each case study chapter.

Data reduction

After several iterations of coding and analysis of my participants’ writing in these various instances, new themes emerged. As new themes began to emerge, I wrote research notes on each one, comparing themes and possible instances between participants. I organized each theme by participant, and then reflected back upon the research questions to see how the data answered (or did not answer) the research questions. These iterative methods were employed to better understand the patterns that came up from these multiple documents, across the contexts of school and work.

The themes that emerged from the data (to show the factors that influenced my participants’ ability to transfer effectively from the classroom to the workplace) included:

- **Understanding of how a community works** - This factor has to do with how well the new members of a community really understand what their community does as a whole, and what the big picture of the system is. It also helps if the participants know what others’ activities in the new community entail as well.

- **Identity** - Here I use Nowacek’s (2011) explanation of identity as “an individual’s understanding of his or her role, capacities, affiliations, and worth” (p. 24). This particular identity here has to do with inner self-identity, but also how my
participants perceive themselves within their new activity systems. This may result in a conflict, as participants must make the transition from identifying as students to identifying as business professionals/interns. Also, identities may change (or be in a state of flux) as participants take on new roles in their new jobs/internships, and try to become full members of their new communities.

- **Participation**- Participation can refer to many things within a new community. New participants can talk/interact informally with their co-workers, they can write documents for the community and receive feedback, and many other activities that include participating within that community. My data shows that participants who are encouraged to write more and more within the organization are actually participating more. Most of the data I have collected in this study on participation refers to their writing and other pieces of communication that were composed within that community.

These three themes are discussed further in chapter 7.

**Reliability and Validity**

To ensure reliable data, I double-checked screencast transcripts for transcription mistakes, and the themes that surfaced were checked several times during the coding process. As Le Compte and Goetz (1982) note, “Reliability refers to the extent to which studies can be replicated. It requires that a researcher using the same methods can obtain the same results as those of a prior study” (p. 35). My methods were very similar to those of Dyke Ford’s (2004), and used her rhetorical strategy analysis, as well as the transfer talk categories of Nowacek (2013). Nowacek (2011) achieved reliability by analyzing a large collection of student work gathered from 3 linked courses in one semester, and
working closely with the other professors of those courses. Dyke Ford (2004) achieved inter-coder reliability by employing 3 graduate students for coding with her. Neither of these were viable options in this study. Instead, I tried to gather as much data as possible (for triangulation), and gathered 90 pages of written data (including transcripts of their class and workplace screencasts) from four different participants who volunteered from 3 different sections. Each of these pages was analyzed with the set coding categories, as well as open coding. I also describe my coding categories in this chapter in as much detail as possible, so future researchers may replicate this type of study if they choose.

Validity strategies included member checking with the participants, by following up with each one. I emailed each participant with the data and analysis, to make sure I had not misrepresented them in any way. Each participant emailed me back, and confirmed that there were no misrepresentations or incorrect assumptions. I triangulated by utilizing various sources, including four different documents for analysis, from the various perspectives of class writing projects, screencast reflections (my participant’s perception of the assignment and new writing project in the workplace), and instructor feedback. These data sources allowed me to have a richer view of each case.

Le Compte and Goetz (1982) also note that there are ways to address external reliability of data: “Ethnographers enhance the external reliability of their data by recognizing and handling five major problems: researcher status position, informant choices, social situations and conditions, analytic constructs and premises, and methods of data collection and analysis” (37). It is important to note my own biases as a researcher, and in this particular case, as a researcher/instructor (which is my researcher status position). I may have inadvertently been drawn towards a more positive view of
my students’ abilities to transfer their learning across contexts. I had a positive relationship with all of my participants, and had enjoyed having all of them in my class. At times, it was difficult to separate my thoughts as their former instructor from more analytical research statements/judgments. This came up as I worked on each participant’s case study analyses. Often, as I was working on analysis I tended to be making more normative judgments and not being as descriptive and analytical as I needed to be. To counteract this, I revised based upon feedback from my adviser, and endeavored to adopt a researcher view of the data rather than the instructor view that I naturally had as my participants’ former instructor. Regular note-taking during the coding and analysis process also gave me the opportunity to be reflective during this process, and helped me to better understand my own positionality as both teacher and researcher.

To prevent any of my own bias from coloring the data, I employed member-checks with my participants. I emailed each participant with their own case study chapter, as well as the discussion chapter, and asked them to read through them. I also asked each participant to make sure that I had represented them accurately, and to let me know if they felt I had not or if they felt I had made any mistakes or assumptions. Each participant responded very positively and none of the participants had any changes to suggest. In his email, Sam said, “Looks good to me! Very very interesting as a whole what I was able to read!” Annie responded, “This was super interesting to read! I don’t have any changes.” And Beyoncé noted, “Thank you for allowing me to review. Everything looks good to me.” Finally, Sally responded, “Thank you for letting me be a part of your work!”
I also chose to represent my participants with their own words as much as possible, so as not to misinterpret anything that they wrote/said. This study received IRB approval on January 23, 2014, ID # 13-325 (please see Appendix A).

My informants (or, in this case, participants) were chosen simply by narrowing down those who volunteered from my course. I carefully described each participant, and chose to represent him or her by his or her own words. The social situations and conditions were very similar, as each participant was familiar with the activity system of our classroom, and then each went on to the activity system of a new internship or job. While each job/internship was different, they were asked to write similar types of documents there. For the analytic constructs and premises, “Replication requires explicit identification of the assumptions and meta theories that underlie choice of terminology and methods of analysis” (Le Compte and Goetz, 1982, p. 39). The coding categories and description of each activity system are described carefully in detail (and can be found in each case study chapter). I also include tables describing my coding categories earlier in this chapter, for easier replicability.

Internal reliability was difficult to achieve in this case, as I was the only researcher on this study. However, I worked closely with my adviser at the beginning of the project, and we worked together to code the first set of data of Annie’s written work. After that initial coding process, I finished the coding and analysis on my own.

The following four chapters are case studies of each of my four participants. Chapter 7 is a discussion and comparison of the possible instances of transfer for my participants.
CHAPTER 3
SALLY: A STORY OF IDENTITY AND ADAPTATION

This chapter analyzes the work of my second participant, Sally, from her work at the beginning of the semester, to her final project at the end of the semester, to her work in her internship, which later turned into a full-time position. I’ve analyzed all of her writing and screencast samples from these various situations to see her writing trajectory over time, and to see if she was able to transfer learning to new writing situations.

I coded Sally’s work first for the use of and discussion of rhetorical strategies, and secondly, for any evidence of “transfer talk” (Nowacek, 2013). The rhetorical strategies that I analyzed were multiple audience awareness, variable audience needs, sense of purpose, organization, professional appearance, and style (Dyke Ford, 2004). The second part of the analysis was “Transfer “Talk” (Nowacek, 2013); I analyzed Sally’s words for evidence of Nowacek’s (2013) “Transfer Talk,” which she defines as, “Any talk through which individuals connect knowledge, strategies, attitudes and identities previously associated with an earlier context to a new context.” I analyzed Sally’s screencasts for evidence of these four “transfer talk” categories:

- Stories about themselves/Self-diagnoses (I go on tangents/identity statements)
- I remember/ I was taught
- Questions framed as absolutes
- Gut feelings (it didn’t feel right)

While I used the coding categories set by Nowacek (2013) and Dyke Ford (2004) to begin the analysis, I also used Grounded Theory to see if any new categories or themes would emerge to better help us understand these possible instances of transfer.
Description of Participant

Sally, a Marketing major, was a very dedicated student, who always added to the class discussion. Sally was always prepared and was a very hard worker. She asked intelligent questions, and would often ask me about things that I had forgotten to mention or to post on the class learning management system (LMS). She was a very careful student and used her resources well and participated in many different campus activities. She was (and is) a very kind person who worked patiently with everyone in her group.

Theoretical Lens

The theoretical lens I use here is Legitimate Peripheral Participation (LPP) (Lave and Wenger, 1991) and Activity Theory. Lave and Wenger (1991) describe their idea of LPP as “an analytical viewpoint on learning, a way of understanding learning” (40). LPP is really a kind of narrative that helps researchers understand how people develop their participation in some kind of activity. Lave and Wenger (1991) argue that all participants first participate on the edge or periphery of a community before they can become full members of a new community of practice. These lenses helps me to better understand three different instances where Sally participated in a community of practice, specifically, to shed “a new light on learning processes, and by drawing attention to key aspects of learning experience that may be overlooked” (41). After combing through the data and coding, several themes emerged. The instances of Sally’s participation have been split up into the following themes that were found in the data.

Documents Collected

The course

From my work first as teacher (and participant), I was able to gather the following documents from Sally:
1. The first major assignment from my Business Communication class -- a messages packet with negative/positive messages for various audiences. Students are given a fictional situation, where they have to act as the manager and solve a mix-up in shipping. In the scenario, two products are mixed up and sent to the wrong customers. Students have to write documents not only to the customers, but also to the shipping manager, their supervisor, and draft a change in policy for the entire company, so this mistake does not occur again. They have to give each audience member the information that they need, but they also have to decide the genre for letting them know that information, like email, memo, or business letter. (Appendix D)

2. The screencast reflection on that assignment (I prompted them to answer a few questions including: How did this assignment go for you? Did you run into any issues? Where? How did you overcome them?) (Appendix E)

3. My Screencast giving her feedback on her Assignment #1. I scrolled through my Sally’s first assignment, and gave her verbal feedback, also highlighting areas that I wanted her to work on. (Appendix F)

4. The final group project. Each group worked with a real client for this final project. Sally’s group endeavored to work with a local deli that was interested in joining the university dining cash system, but was unable to finish that project due to feedback from the university’s dining services. So, instead, Sally and her group decided to pitch an opportunity to the heads of dining services. (Appendix G)

5. Sally’s final screencast reflection on the final project and the semester, overall. (Appendix H)

For the Final Project for the course, I assigned a client-based writing project.

Students were split into groups of 3 or 4 and were asked to find a client who needed their help with some communication problem. Each project was different, but each project had to address a real-life problem or opportunity, and had to provide deliverables.

(Assignment sheet can be found in Appendix).

After I approved the project topics, the groups then were asked to write a formal proposal, complete a progress report (written and oral) in the middle of the project, write their final reports, and present their findings to the class. Students were also asked to give their final report to their clients. Their grade was not dependent upon their clients’
utilization of their ideas/projects. While client-based projects certainly have their own challenges, Bourelle (2012) notes, “the teacher has to be the bridge to ensure the students’ success” (189). While I did not contact students’ clients (unless they asked me to), I checked in with the group each class period to make sure the projects and communication between clients and groups was going well.

Sally’s group project actually did not go as planned. Originally, the group wanted to propose that a local deli that was located right outside of campus should be able to utilize the campus meals money system, just as those that were located on campus. However, this ambitious project hit several dead ends, with some important contacts not getting back to them. So, the group eventually came up with a new idea, and proposed that they should instead have a new meal payment system altogether. This final project was well organized and well researched.

Sally was a full participant in this community as she was a member of the class, and participated in class discussions and class projects. There was no doubt that she belonged in that space. Within the business communication classroom her identity was that of business major student, specifically a marketing major. This was true all the way from beginning of the semester, to the end of the semester when Sally was working on the final project with her group. The activity system of our classroom can be represented
like this:

Figure 1: Classroom activity system

The tools and objectives that this activity system had were typical of most classrooms. However, the activity system of a classroom is very different from most workplaces, where the objective is not to get a good or passing grade and learn about communication, but to grow as a company and/or increase customer base.

**Internship documents**

After graduation, Sally got an internship working with a communications company in her home state. Her job required that she summarize information from articles and re-write it into blog posts that would be shared with her company’s clients. She needed to be able to synthesize the most important information for her audience.

For Sally, I analyzed the following pieces from her internship experience:

- An informational blog to post on her internship organization’s website (summarized from an article). (not included to protect anonymity)
A screencast reflection on that blog post (Appendix I)
A draft of the blog post, with her editor’s comments on it.

The following is a diagram of the activity system of Sally’s internship (which later turned into a full time job):

Figure 2: Sally’s internship activity system

**Theme 1: Multiple Audience Awareness and Variable Audience Needs**

From the beginning of the semester all the way to her internship, Sally was very sensitive to audience needs. In her first assignment for the course (the messages packet), Sally showed an awareness of audience needs that was well above average for most students who took my course. She first reassured her fictional customers in the beginning of their letters of the most important piece of information that they needed to know:

“Your rightful product is on its way!”
Later for that same assignment, she also noted in her Screencast reflection what she felt her audience really needed to know (regarding an email to a peer),

“To Fred, I assumed he would get multiple requests like this, so I kept it as brief as possible, just saying that an error has occurred, and that an expedited product would need to go to this specific address, and that the product was headed there, asking him to notify me when the product was sent out, so I could send the letters out.”

She knew he would be receiving many emails, and only included the shipping information that he needed. This showed an excellent awareness of context.

Sally also carefully organized the sections of her documents with indents to separate important information, and with descriptive headings. For example, in the Policy Change Memo to her fictional company, she separated the information for the various audiences who would be reading it: “Actions for Ordering Department,” and “Actions for Managers.” This careful delineation of information was very thoughtful and showed how carefully Sally thought of the various sections she would need to cover the needs of her audience members. This organization also made it possible for her audience to carefully skim to the section that they needed to read.

I was also impressed with the way that Sally described her assignment to me in her Screencast reflection. She scrolled through the entire assignment, carefully explaining the documents to me in great detail. For example, in the New Policy Memo that was supposed to be written to the rest of the employees in the company, she said, “Then for the new policy order, I made it a list serv for the ordering and shipping departments as well as ordering managers, notice for shipping department, the effective policy date, as well as where to contact us for any questions.” This showed great attention to detail. Not only was Sally thinking about the various audiences and how she should set up the
document for them, but she even thought about the dissemination of the document and how it would be sent out to those audiences.

**Reflecting**

Interestingly enough, Sally also noted in her Screencast reflection that there was something she wish she had done differently in her first assignment: “Anything I would like to go back and correct in these letters is explaining to them (customers) that we’re making a policy to reduce the number of errors that occur.” I was impressed that Sally was looking back on her assignment and thinking of ways to make it even better. Also, she was thinking of how positive and forward-looking this would seem to the company’s customers. It shows that she really took her audience seriously.

**Final project audience awareness**

The audience for Sally’s final project was actually the Vice President of Business and Finance for the University, and the secondary audience was me (the instructor). Sally did point out that other audiences would be affected by this report: “The remainder of this report will dissect the pros and cons of implementing Campustown Cash for the three parties involved: University Dining, the University student body, and local businesses.” Sally realized that each audience had a specific need, as she wrote in her final reflection, “All of our audiences seek value out of what they do with their money.”

The purpose of the final report was to present the group’s new idea for options for buying meals on campus, to provide all of the information so the audience could make a decision, and give recommendations. In the opening letter, Sally writes, In this report you will find a thoroughly detailed outline of a new form of payment to be included into campus dining called, Campustown Cash. We have provided key information and have made recommendations to completely explain the details of this plan and the process to implement it.
The information in the report was clearly presented and immediately focused on the purpose and the importance of the project for the audience.

The final report itself was organized for audience readership. The group even included helpful tables to organize some of the information carefully for the audience (see Table 5):

(Table 5: Sally’s group’s table from final project)

<table>
<thead>
<tr>
<th>Table 1</th>
<th>Percentage of the 10,000 Students</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Value</strong></td>
<td>5%</td>
</tr>
<tr>
<td>$50.00</td>
<td>$1,250</td>
</tr>
<tr>
<td>$100.00</td>
<td>$2,500</td>
</tr>
<tr>
<td>$150.00</td>
<td>$3,750</td>
</tr>
<tr>
<td>$200.00</td>
<td>$5,000</td>
</tr>
</tbody>
</table>

Headings were also used appropriately, and information was organized into sections, with a clear Table of Contents. As Sally explains in her final reflection for the course,

This information needed to be presented coherently and logical in a format that he could easily understand. We chose to do an introduction, and then split the information up into three categories: University Dining, the University Student Body, and Local Businesses. Although the introduction summed up the information, the three categories explained in detail the role each would play in enabling Campustown Cash.

Sally carefully focused the organization of that final report to truly explain their project to their audience.
Internship: Multiple audience awareness and variable audience needs

When Sally reached her internship, she had many different audiences whom she needed to reach. Again, here Sally did very well addressing those various audiences’ needs. Her blog was meant to be informative and helpful for many people in her state. As Sally noted, it was for “Anyone in the state who wants to know more about satellite options… Many people across the state.” She needed to provide information to people in the state who may not be able to receive this information any other way.

Sally’s other audience members included her boss and her editor, both of whom wanted to make sure that they shared this important information with their clients across the state. These audience members had different needs. Sally noted that the information was important because of these questions: “How it affects them? When will they be in the area?” Sally also realized that her blog summarized important information, so she usually included links to the original article so the readers could click on the original source of information. Sally noted, “And I always end it with, ‘View the full article’ because this is not my article. I have my name on it simply because I took the time to write this up and, but I want to give 100% credit where it is due.” The importance of giving credit where it is due was certainly something that I emphasized in my course, but it is also something that Sally probably learned in her earlier writing classes, like composition. She knew that showing the original article would give her greater credibility with her readers as well as with her supervisor and editor.

Sally seemed to have a firm grasp on what her company wanted her to write when I contacted her mid-way through her internship. In fact, the only comment that her editor noted on her article draft was, “It’s unclear what part of this is taken directly from the article: Would say: ‘According to the Via Satellite article, ‘the…’” As this was the only
note that her editor added or suggested that she change, it seemed as though Sally (by this point in her internship—several months post graduation) had a very good idea of how she was expected to write. She seemed to have a greater understanding of how her community was expected to write and sound like. As Lave and Wenger (1991) suggest, Sally had learned “that the purpose is not learn from talk as a substitute for legitimate peripheral participation; it is to learn to talk as a key to legitimate peripheral participation” (p. 109).

It seems as though Sally had previously had practice with audience analysis before she took my course (possibly from previous courses or other writing experiences), as she had excellent work with audience analysis in the business communication classroom. It is possible that the practice she had writing for specific audiences in my classroom may have led her to a better understanding of her audience in her internship. Her work at the beginning of the semester was very strong, and continued to be at a very high level by the end of the semester in her final project. She had practiced audience analysis in various contexts and communities (my class and her job), which may have led to her integrated participation in her internship: “Legitimate peripheral participation refers both to the development of knowledgeably skilled identities in practice and to the reproduction and transformation of communities of practice” (Lave and Wenger, 1991, p. 55). We can see that Sally was able to consistently understand audience needs in various contexts, and that this was something that she developed during the course of my class and into her internship. It seems as though Sally, while not directly transferring learning from my classroom to her internship instead had a developmental trajectory of learning,
where she worked on rhetorical skills in the business communication classroom and they became even stronger with her practice.

**Theme 2: Focus on Summary/Adaptation**

For her internship, Sally needed to become proficient at summaries. Her job position required her to read articles, summarize the most important information, and write a short blog post about what her audience needed to know. Her experience was similar to that of Doug Brent’s (2012) participant, Celia. He wrote, “In contrast to many of my participants, Celia was not faced with an avalanche of different tasks requiring rapid familiarization with a variety of genres. Rather, she needed to master variants of only one genre, the objective summary” (572). While this is something that I did cover in my business communication class, Sally did not specifically note that she practiced this skill in my class. In the class, we discussed summaries during two class sessions, practiced in class, and then put it into practice for the final report, in the form of an Executive Summary. This is often a difficult genre to write, as it can be hard to distill an entire project into a one-page summary. However, Sally’s was clearly written:
CampusTown Cash
Expansive Innovation for Midwestern U Dining

Executive Summary

To maintain stability and growth for MIDWESTERN U Dining, they should provide a service that will allow students to eat at off-campus dining locations. MIDWESTERN U Dining is currently not affiliated with the University and is required to financially sustain themselves. Although they have struggled every year, they have succeeded in making a profit. Our proposal will bring a guaranteed marginal profit to MIDWESTERN U Dining that will aid in the future stability of their business and provide students with a new desired option.

We are proposing a new form of payment that will be an option for students to purchase as a bundle with meal plans, or as a separate commodity. Called “CampusTown Cash”, however, it will not be given at a premium to students like “Dining Dollars”. Rather, students will purchase CampusTown Cash at a flat rate that can be used at both on and off-campus dining options. It essentially will be seen as a debit card ran through MIDWESTERN U Dining. Businesses that are accepting of this payment will pay a $0.05 tax on every dollar gained to MIDWESTERN U Dining. This will provide off campus businesses with a new market and customer base they otherwise would not have reached.

Our research indicates that the vast majority of MIDWESTERN U students strongly covet the option to eat off campus using a payment form of MIDWESTERN U Dining. After meeting with Director of Campus Dining Services, we have concluded that using any existing form of payment off campus is not financially feasible to provide to the students. The main reason this is not a realistic option is due to the requirement that MIDWESTERN U Dining places on any payment used exterior to MIDWESTERN U Dining, which is a tax of $0.17 on every dollar. Local businesses that surround MIDWESTERN U will not be able to afford that high of a tax which is the focal reason why an off campus payment option has not been successful in the past. The reason for MIDWESTERN U Dining charging that high of a tax is due to the premium that is given to students when purchasing on-campus dining payments. Our new form of payment will lower that tax number down to an estimated $0.05 on every dollar, while still maintaining a profit. This is a reasonable tax that we believe will entice the surrounding restaurants near campus.

CampusTown Cash provides a win-win situation for all parties involved. The student body receives a long desired off campus payment option, MIDWESTERN U Dining has a guaranteed increase in profit, and local businesses customer bases will grow.

(Figure 3: Sally’s Executive Summary)

The Executive Summary highlights the main points from the final project, and argues for the new proposed form of dining money. While it is possible that Sally’s practice writing summaries in my class may have helped her to write summaries effectively in her internship, it is also possible that she learned to write clear summaries in high school or in a previous college course.
Clear understanding of the summary genre
Sally was able to explain to me in her screencast for her internship blog how she organized the information she was summarizing: “Information separated into 4 paragraphs. And then I quote the articles, and take who the information in the article is from, and then present our statewide audience with the Company information, that I find from this article.” Sally seemed to focus on how she organized the information for her blog posts, because most of the information that she wrote about came from other articles. She mentioned that it was important to share this information with her audience, because it may contain important information that they would need to know. So, some of her audience may note that, “officials discussed the possibility of using satellite technology to cover hard to reach areas” (taken from the blog post). For Sally, this information had to be shared and had to be made clear to those who were reading it, who might not have access to that information otherwise.

Similarly, Brent’s (2012) participant, Amy, became more aware of how she was structuring her information in her internship writing experiences. Brent (2012) notes,

“Another takeaway from the course was an increased sensitivity to information structure. When reading quickly for information—for instance, when reading books to summarize—she found that one of the books was especially easy to summarize because “it wasn’t written in huge long chunks of paragraphs and whatnot, but it would always be broken up by points, and the headings were consistent.” She connected this observation to the fact that “I’ve been picking up stuff from my technical writing course.” Because of that course, she appeared to have more conscious appreciation of the rhetorical moves that the author used to make the book more easily accessible” (p. 570).

Sally similarly seemed to be more aware of the rhetorical moves of that particular genre. Because of that, her writing for her blog posts seemed very clean and easy to read, with a
professional title that gave her audience a good idea of what the blog post was about. Her style was informative, as she notes in her workplace screencast, “to share SatelliteInfo stuff with our people.”

Sally understood that many of her audience members only had access to this important information through her company’s website and her blog, so it was very important that she share that information in a way that all of her audience would understand. She also always shared the link of the original article, so her readers could always go back to it and read more about that particular issue.

It seems as though Sally honed this skill when she practiced summarizing and organizing important information for her new job blog posts. However, Sally did not specifically state where she learned this skill. As Brent (2012) noted in his research, “We can perhaps attribute this self-monitoring skill to a general internalization of academic discourse. However, in this case it is extremely difficult to identify any specific instances of transfer” (p. 573).

Because her editor usually only marked one or two issues in her blog posts, it seemed that she had done very well with that particular genre and was able to write as the organization expected her to do. She seemed to have successfully become a part of the organization due to her participation within it, and moved from the periphery to the middle of the community of practice (Lave and Wenger, 1991).

**Theme 3: Sally’s Burgeoning Identity**

While some recent graduates may have a difficult time transitioning from a student to a business professional, Sally’s identity seemed to shift smoothly as she made
that transition. Sally was a Marketing major when she was an undergraduate, and constantly looked for opportunities to practice and work on her skills in that area. She found other internships, and even found a position with a robotics club on campus, working as the marketing coordinator. After graduation, Sally worked as an intern in a communications company, writing a blog that was then posted on her company’s website. It seems as though Sally’s identity grew into that of a marketing professional during her time in this internship.

To explore this possible identity connection, I analyzed Sally’s screencast reflections, using the categories of “Transfer Talk.”

**Identity**

Sally seemed to have a strong identification connection with her new company. This was evidenced by the words that she used when she discussed her new job and what her new company actually did. She notes the importance of how they share information: “And I find articles, and then I quote the articles, and take who the information in the article is from, and then present our State Communications audience with the Satellite Company information, that I find from this article” (emphasis mine). I wanted to emphasize her use of the word “our” as it shows her connection and professional identity with her new company. It is important to note how casually she uses it in her screencast, because she considered herself to be a part of that company.

She also mentioned that the importance of sharing information from the Satellite Company is that it helps function as an emergency network to help keep people connected during natural disasters. Sally went on to mention, “But, the people who need it, like the EMTs and EMS cannot necessarily get through, just out to their headquarters
to be able to help people.” Sally wanted to ensure that her customers received this important (and potentially life-saving) information from her blog posts.

During this same workplace screencast recording, Sally actually walked me through the company’s CMS, and explained how the information was organized and how she was then able to create a new blog post and post it on their website:

“Then we go down to the website so, I have it cued to the homepage. This is the homepage, for State Communications, which is the company I work for. And here is that blog. And, as you can see I go in and it’s literally the exact same thing, with however the change was that I incorporated it. Now, I’m just going to show you the back end of the website. And this is called the content management system.”

After Sally had explained how she posted her blogs onto the organization’s website, she ended with, “that’s pretty basic for all of the blogs that we have to do” (emphasis mine). This internship was something that Sally enjoyed doing, and her words show that she felt like a part of it. Not only was Sally involved in helping her customers, she was also integrated into her new community in a legitimate way. Lave and Wenger (1991) note “To be able to participate in a legitimately peripheral way entails that newcomers have broad access to arenas of mature practice… A newcomers’ tasks tend to be positioned at the ends of branches of work processes, rather than in the middle of linked work segments” (p. 110). While Sally’s blog posts were not at the heart of this organization, they were a very important way for the company to share information with their customers. As Sally became more involved with the company, she learned more about how the company worked and had access to other components of their website. Eventually, due to her hard work, she was promoted to a full-time position at that
company. Sally self-identified professionally with the company and was thrilled when
she was promoted within it. For more discussion on identity, please see chapter 8.

**Gut feelings**

Another category of “Transfer Talk” that Sally portrayed was that she mentioned
her gut feelings. She used gut feelings to figure out what seemed right or important to add
into her summary of the articles. She noted, “So, what I do is I pull bits and pieces from
the article, the important quotes, stuff that I don’t feel I can do justice to re-write or it’s
just basically so basic that if I re-wrote it, it would end up being the same thing.”
However, these gut feelings seemed to be connected to her burgeoning knowledge of the
company and what they needed to tell their customers. She seemed to be able to tell what
was important and what wasn’t.

Sally seemed to identify with this company and appreciated the importance of the
work that they do. This internship was also longer than Annie’s (please see Annie’s
chapter), which was only 3 months long. Sally seemed to really get a chance to assimilate
to the environment of her new position, and was then promoted to a full-time writing
position within the organization. She was thrilled when she found out about her
promotion, and seemed to have become a full participant of that community. Lave and
Wenger (1991) remind us that

learning involves the whole person; it implies not only a relation to specific
activities, but a relation to social communities – it implies becoming a full
participant, a member, a kind of person. In this view, learning only partly – and
often incidentally – implies becoming able to be involved in new activities, to
perform new tasks and functions, to master new understandings (p. 53).
Sally’s identity formed/shifted as she worked more and more with her company in her internship. Throughout her time in her internship she came to understand how the community functioned and found her place within it. Not only did she find her place, but she was also shown that she was a very valuable member of the community when they promoted her to the full-time position.

**Discussion**

To review, I’d like to come back to the first two research questions:

1. Through what school experiences did students report or appear they learned and developed the rhetorical strategies they used?
2. Through what nonacademic work experiences did students report or appear to learn and develop the rhetorical strategies they used?

Lave and Wenger (1991) found that participants need to be fully integrated into their new communities of practice to become full participants of them. Through Sally’s experiences in the business communication classroom to her experiences in her job we can see evidence of these three themes: audience analysis, summary/adaptation, and identity.

For the first question, it was apparent that Sally had excellent audience awareness skills, even from the beginning of the semester. However, those skills seem to have developed further as she worked through the final client project, and on to her internship. I am also aware that she had another internship in the time between taking my class and going to her current job. This other internship may also have helped strengthen these audience awareness skills, as the position was Marketing Coordinator for a university robotics club. Because the business communication class is heavily focused on writing to an audience, Sally certainly had an opportunity to develop her audience awareness skills.
Similarly, Sally’s ability to master the short summary was something that she practiced in my course, but is also something that she could have practiced in many other situations. Sally was able to practice and develop this skill over several different assignments, including the final report, where she had to write an Executive Summary. Because she did not directly state where she had learned this skill, I can only conjecture. However, I can also see how Sally transitioned to her job and used this skill effectively in her internship writing. We can see that Sally did write effectively in her internship, as her supervisor merely gave her one comment on her draft, which was apparently very typical for her work. Sally was able to take an article and synthesize the most important information for her audience.

For question two (which also happens to relate to Theme 3- identity), Sally noted that she wished she had more experience with LMSs so it would have been easier for her to learn the one at her job. Sally did actually learn about LMSs while she was at the university, even in my class, as we used one for our class website (Moodle). While it did not resemble the look of the LMS that we used in my class, the overall structure of the LMS in my class and the one used in Sally’s job were very similar. It is possible that she figured out how to use that LMS in her job quickly because she had practiced navigating our classroom one, as well as some of the other LMSs that other courses across the university used. It seems as though this was an example of unconscious transfer (Nowacek, 2011), but one that served her well. So, while Sally reported that she learned this skill outside of any classroom, it is very likely that her experience using it with several classes was a large part of that skill development.
Sally’s identity smoothly transitioned from that of marketing student to blog writer intern to communications professional throughout the span of this project. Sally’s motivation to succeed in her field helped her to keep focused on constantly working towards that goal.

**Conclusion**

While each participant in this study has had a vastly different experience with their job/internship, Sally’s opportunities to participate in various communities of practice seemed to build upon each other. Sally already seemed to have excellent audience awareness, but that also seemed to improve as she transitioned from the business communication classroom to the workplace, and became a full member of her new community. Roozen (2008) reminds us that writing teachers need to keep this in mind:

> helping students extend themselves into the privileged conventions of the university is not so much about teaching them new practices as it is about providing them with productive opportunities to negotiate a range of literate engagements, to explore the wealth of literate practices in their ever-expanding repertoires and to consider how these practices might related to one another (p. 29, “Journalism”).

As Roozen (2008, 2009, 2010) found in his studies, students often draw on many different experiences (public, private, and school) to help them when they are faced with new writing situations. It seems that Sally was also influenced by the many activities that she was a part of (although I do not have evidence of those other specific influences), and
was able to bring that with her to her classroom writing as well as her professional writing in her new job.

Lave and Wenger (1991) want us to remember that they “conceive of identities as long-term, living relations between persons and their place and participation in communities of practice. Thus identity, knowing, and social membership entail one another” (p. 53). This participation and understanding of how her new communities of practice worked together helped Sally to better participate within them, and become a new, full member.

Sally seemed to experience a “consequential transition,” which, as Beach (2003) defines it: “A transition is consequential when it is consciously reflected on, struggled with, and shifts the individual’s sense of self or social position” (p. 42). Sally had the opportunity to reflect upon her work (both in the business communication classroom and in her internship), and she showed how important she felt her work was in her internship. Her identity seemed to shift while she worked there (as we can see from the way she spoke about it in her workplace screencast), and she eventually became a full member of that community when she was promoted. While Beach (2003) gives the example of a student moving from school to work as a common consequential transition, this does not happen smoothly for every student as it did for Sally here. This experience shows her developmental trajectory of learning throughout the period of this study. This is different than the findings from many of the other studies previously mentioned, because here I was able to document a trajectory of development in Sally’s work, both in the rhetorical strategy of audience awareness and in the specific genre of summary writing. We can see from the minimal revisions that Sally’s supervisor gave her give evidence to her
exceptional work in her internship. This is relevant for instructors and researchers alike to be aware of when teaching or conducting this type of research, as students may need encouragement and assistance when working on their own trajectories of development.
CHAPTER 4

BEYONCÉ: A STORY OF STYLE AND IDENTITY

This chapter analyzes the work of Beyoncé, from the beginning of the semester in my course, to the end of the semester project, to her internship in the career services office on campus. I’ve coded Beyoncé’s work for use of and discussion of rhetorical strategies and evidence of “transfer talk.” The rhetorical strategies that I analyzed were multiple audience awareness, variable audience needs, sense of purpose, organization, professional appearance, and style (Dyke Ford, 2004).

The second part of the analysis was “Transfer “Talk” (Nowacek, 2013). To find more information about how Beyoncé described and perceived her own writing, I turned to Beyoncé’s screencasts to see/hear how she talked about her own work. I wondered if this part of analysis would shed some light on the kinds of meta-awareness that my participants had of their own work. I analyzed Beyoncé’s words for evidence of what Nowacek (2013) calls “Transfer Talk,” which she defines as, “Any talk through which individuals connect knowledge, strategies, attitudes and identities previously associated with an earlier context to a new context.” I analyzed Beyoncé’s screencasts for evidence of these four “transfer talk” categories:

- Stories about themselves/Self-diagnoses (I go on tangents/identity statements)
- I remember/ I was taught
- Questions framed as absolutes
- Gut feelings (it didn’t feel right)
I also used Grounded Theory to find any other themes that may have emerged out of the data that were not covered under existing theory. I did not want to be limited by the current theory’s categories.

**Documents Collected**

**The course**
From my work first as teacher (and participant), I was able to gather the following documents from Beyoncé:

- The first major assignment from my Business Communication class -- a messages packet with negative/positive messages for various audiences. Students are given a fictional situation, where they have to act as the manager and solve a mix-up in shipping. In the scenario, two products are mixed up and sent to the wrong customers. Students have to write documents not only to the customers, but also to the shipping manager, their supervisor, and draft a change in policy for the entire company, so this mistake does not occur again. They have to give each audience member the information that they need, but they also have to decide the genre for letting them know that information, like email, memo, or business letter. (Appendix J)

- The screencast reflection on that assignment (I prompted them to answer a few questions including: How did this assignment go for you? Did you run into any issues? Where? How did you overcome them?) (Appendix K)

- My Screencast giving her feedback on their Assignment #1. I scrolled through Beyoncé’s first assignment, and gave her verbal feedback, also highlighting areas that I wanted her to work on. (Appendix L)

- The final project, which was a client-based project, was a Marketing Plan to bring awareness and more spectators to the University’s wrestling events (Appendix M).

- A blog post that Beyoncé wrote for the Career Services website, giving students advice on their job searches with feedback from supervisor. A conversation with Beyoncé and her supervisor. (Appendix N)
**Description of Participant**

Beyoncé’s major was in Marketing, with a double minor in Finance and Supply Chain Management. A slight introvert, she often listened quietly to the class discussion, and then would answer a question when she felt ready. Beyoncé worked well with her group, and seemed to really enjoy the final group project. She seemed to feel more comfortable working within a group. She was also very creative and insightful. She seemed to be adept at using her available resources, like the textbook, to write in new situations.

**Our Class**

The activity system of our classroom can be represented like this:

(Figure 4: Classroom activity system)

The tools and objectives that this activity system had were typical of most classrooms. However, the activity system of a classroom is very different from most workplaces,
where the objective is not to get a good or passing grade and learn about communication, but to grow as a company and/or increase customer base.

**Internship**

The semester after Beyoncé took my Business Communication course, she got an internship with the University’s Career Services office. Her main job duties included writing a weekly blog post that was published on the Career Services website. To give an idea of how her internship worked, I created a visual of the Activity Network at Beyoncé’s internship in the Career Services office:

(Figure 5: Beyoncé’s internship activity system)

When I met with Beyoncé and her supervisor in the Career Services office, it seemed apparent to me immediately that Beyoncé felt comfortable being there. She knew
everyone in the office and would smile or wave at someone when she walked by. She seemed to belong there.

**Overall Themes**

As I analyzed Beyoncé’s work, I began to notice two specific themes emerge. First, she liked to use her creative side when she was working, to create a specific style on her documents. Beyoncé’s ability to write in a particular style was something that she did well in her class assignments, but also something that she developed even further when she worked in her internship. The second theme that emerged was her sense of identity, when she worked with the career services office in her internship. It is also possible that this sense of identity that Beyoncé had with her new community of practice may have helped her to participate more within it and learn how that community worked.

**Theme 1: Style and creativity**

Beyoncé actually was very creative in the first assignment for the semester and designed a professional-looking letterhead and logo for the fictional company to use on her documents (this was not part of the assignment). I commented upon it in my screencast to her, saying: “I absolutely love the header and the logo that you used. It looks fantastic. I can tell you worked on it for a while and it looks really great.” (Please see figure 6 below).
Beyoncé also mentioned this logo and letterhead in her Screencast reflection, noting, “I decided to get a little bit creative, too, and I did end up creating a letterhead for Tech Co.” The extra work that Beyoncé put into this assignment really made it look like it came from a real tech company. It seems as though having this letterhead actually helped Beyoncé work on this assignment. Beyoncé noted in her screencast reflection after this assignment was handed in: “And most of the book examples had that in their formatting, so it was easier for me to follow the correct format by just making my own letterhead.” Just as Sally had mentioned previously, having a professional letterhead helped make this assignment feel more real for Beyoncé.

I was impressed that many of my students, like Beyoncé, carefully followed the genre conventions of the genres that they used, and followed formatting guidelines. Dyke Ford (2004) noticed a similar finding in her work with engineering students. She found that her students placed emphasis on using templates and specific formats. Not only did my students depend upon careful formatting of their documents, Beyoncé in particular even felt that it was easier for her to write the specific piece if it looked like it had a real letterhead.

Beyoncé also wrote in a professional style, and crafted her messages carefully. I noticed this most in her email to her supervisor (also a part of the first assignment), where she was trying to reassure her supervisor regarding the fictional mix-up situation: “The
situation appears to be under control. I will keep you posted on any updates as I receive them. Feel free to contact me with any further questions.” It can be very difficult for students to sound confident and professional in their writing, especially when the situation is fictional and they are trying to sound like they are actual professionals in their fields. However, Beyoncé was able to keep this professional, but honest tone throughout this first assignment. This shows an excellent awareness of context and audience awareness.

This is an interesting finding, as it is dissimilar to what Dyke Ford (2004) noted in her study with engineering students:

Consideration of style was evident, but the ways in which they compartmentalized their knowledge of rhetorical strategies during their interviews suggests students did not use concepts like audience and purpose to help them choose or refine their writing styles. Rather than discuss the ways in which a document’s purpose helps to establish the organization, the students spoke of them separately (p. 310).

Beyoncé’s understanding and excellent use of style was unusual, and continued through to the end of the semester, and then to her internship.

At the end of the semester, Beyoncé wanted the final project to look professional, and even included a letter of transmittal at the beginning of the report. The letter sounded professional (barring a few awkward phrases), but also had a passionate tone:

Through conducting surveys, interviews, and various research, we have accumulated an astounding mass of information showing the need for an adjusted marketing campaign for the university’s wrestling program. Our group feels passionately about the matter at hand and is dedicated to resolving the issues
present. Thank you for looking into the possibilities we are about to present and for the time taken to consider our entire proposal. We are happy to provide any further research or assistance needed throughout the implementation process. We look forward to your thoughts on the research presented (from letter of transmittal).

This understanding of the importance of tone and professional voice show that Beyoncé had a clear understanding of discourse community conventions. She knew that they were writing as students to a professional organization within the university, but she knew that they had to sound passionate and professional to be taken seriously, especially when they gave their recommendations to their client.

Workplace Writing Style

In her internship work, Beyoncé wrote blog posts that were published on the career services website. Beyoncé’s blogs were not long, but looked like a typical blog post. Her style of writing was friendly/casual. She wrote: “This break, make it your goal to prioritize your job search related goals. Make a to-do list, compete it, and reward yourself accordingly with Netflix time, etc. Trust me, you’ll thank yourself later!” It was important to Beyoncé’s supervisor that she keep her own voice or style of writing. They wanted her blog posts to come from a fellow undergraduate student, hoping that particular style would appeal to undergraduates.

While she was writing a blog post for a career services website, she was writing to her peers, so she needed to sound knowledgeable, but also friendly. As Beyoncé’s supervisor noted when we sat down all together, “We try very hard to keep it in their
interns’ voice, and make it sound like it is them speaking to their peers. The blog is a
different, very friendly peer space.” This friendly tone was something that came across in
Beyoncé’s weekly blog posts. Beyoncé wrote, “Finals have come and gone and it’s time
to relax, right? Wrong.” The tone that Beyoncé achieved here sounded very much like a
friend giving another friend some advice.

Because of this focus on personal voice and style, those in her office did not often
make big changes to her blog posts. For example, her supervisor crossed out the word
“So,” when she started a sentence with it, as it seemed unnecessary. There were also a
few word changes, like the phrase “cleaning up your LinkedIn” was changed to read,
“improving your LinkedIn account.” These changes seemed to focus on clarity and flow.

Beyoncé’s effective writing style in her new workplace is significant, as it shows
she had a deep, albeit new understanding of how her community worked and how it
communicated. There were similarities between Beyoncé’s work in her internship in the
career services office, and that of the Yucatan midwives in Lave and Wegner’s book
(1991). Beyoncé was in that internship for a year, and was immediately brought into the
office as a member of the community. For the Yucatan midwives,

Apprenticeship happens as a way of, and in the course of, daily life. It may not be
recognized as a teaching effort at all…Girls in such families, without being
identified as apprentice midwives, absorb the essence of midwifery practice as
well as specific knowledge about many procedures, simply in the process of
growing up (p. 68).

While there are many differences between the two situations, what is key here is that
Beyoncé was simply a part of that office community from the start. She was brought in
and she was shown how the office works and how they all communicate together, especially in their written communications. Because the written communications are routed across the entire office, Beyoncé was privy to the work that the rest of the office was completing and was able to learn in the process of being there. She also learned how the office handled certain situations and what they did to address them. Because of this experience, Beyoncé was able to understand the typical communication practices of that community, and learned that particular writing style.

**Theme 2: Identity**

Beyoncé’s internship experience seemed to impact her identity. After analyzing her work for Transfer Talk, I found that Beyoncé noted that she felt that she was a part of her new community (the career services office) after she had been there for a part of the spring semester. Her identity seemed to come from her involvement within the new community. As Lave and Wenger (1991) note,

> Activities, tasks, functions, and understandings do not exist in isolation; they are part of broader systems of relations in which they have meaning. These systems of relations arise out of and are reproduced and developed within social communities, which are in part systems of relations among persons (p. 53).

This community functioned and communicated in a very specific way, and Beyoncé was able to find her place within it. The following experiences describe how the internship community helped her become a member of the community.

**Multiple audiences and needs**

One of Beyoncé’s job duties at the Career Services office was to write a monthly blog post that was posted to their website. She was asked to write to her fellow
undergraduate students, giving them advice and information regarding the job search. Her audience needed to know what to expect about job interviews and applications.

So, when Beyoncé was working on her blog post for the December blog, she entitled it: “Working on the job search: ‘Rejuvenating your job search this break…’” She wanted to encourage her fellow students to continue working on their job searches, even though it was going to be posted during their winter break.

One thing that her Supervisor commented upon was that she wanted Beyoncé to focus on a certain group in the undergraduate student audience. So, when Beyoncé had written to “Undergraduates,” she (the supervisor) changed it to “Anywhere from Sophomores to Seniors.” This change helped focus the message more towards those students who were closer to graduation and the job search. This focus on writing to fellow students also helped give Beyoncé a sense of belonging, because she was writing to her peers, to a group of people that she understood well.

**Becoming a member**

Another way that Beyoncé’s new community of practice encouraged her to become a member of the community was by giving her a sense of agency. When I met with Beyoncé and her supervisor, they both noted that much of the brainstorming or idea generating process for the monthly blog topic came from Beyoncé. While monthly themes were sometimes decided by many people in the career services office, Beyoncé had to look over the ideas and then decide which one she wanted to write about. For her post the week after finals, she decided to remind her fellow students to work on their job searches. Some of the ideas that she came up with were, “Reconnecting with old contacts, updating your resume, drafting cover letters, cleaning up your LinkedIn, even designating
go-to interview ensembles…” Beyoncé was given the opportunity to practice talking or writing like her community.

Because Beyoncé was involved in the office community, she learned quickly the style, or the kind of talk that full members of the office used. The other members of the office were able to give her specific written feedback on her blog drafts, as her blog made the rounds of the office. One co-worker suggested that she, “provide examples of what the reader may be doing to relax.” She then went on to suggest other examples that Beyoncé’s readers could do with their job to-do lists.

This identity was important to Beyoncé in her time at her internship. She clearly enjoyed working there and felt comfortable with her co-workers in the office. (See chapter 8 for a more detailed discussion on identity).

**Discussion**

To review, I’d like to come back to the research questions that I posed originally:

1. Through what school experiences did students report or appear they learned and developed the rhetorical strategies they used?
2. Through what nonacademic work experiences did students report or appear to learn and develop the rhetorical strategies they used? (Dyke Ford, 2004)

For question 1, Beyoncé did not specifically mention skills that she had learned in my classroom, but we did work extensively on clear and concise writing, and her blog posts at her internship had to be short and contain clear advice for job seeking students. We also discussed specific rhetorical strategies, like audience analysis, which is something that Beyoncé used well by addressing audience needs very clearly throughout her work. These are both strategies that Beyoncé improved upon consistently throughout her class assignments, by thoughtfully writing to various audiences at the beginning of the semester, and then very purposefully writing in a persuasive manner at the end of the
semester to her final project audience. This was also used effectively in her internship writing. Beyoncé seemed to take advantage of the practice that she had in my classroom, as she notes in her final reflection:

First off, I enjoyed how this particular course was tailored to business students. I took away a great amount of knowledge regarding professional writing skills and generally improved my presentation nerves. I definitely feel more prepared to demonstrate professionalism through my writing as I begin internships, jobs, etc.

It seems as though the practice during the class assignments helped Beyoncé develop those skills even further, and when she was in her internship, she was able to successfully use them to write to a new audience.

It is also possible that Beyoncé’s creativity in her logo was something that she learned in one of her marketing classes, as branding is an important part of marketing coursework. It could be something that Beyoncé brought with her from one of her marketing courses, and used effectively in my class.

For question 2, Beyoncé did not specifically mention where she learned her rhetorical strategies that she used in her internship. It is possible that some of the strategies she used came from many other places and experiences that did not have to do with her coursework, like past jobs.

Beyoncé was able to use some of the rhetorical strategies that she had possibly learned and practiced in the business communication course and used them effectively in her internship in the career services office. This is significant, in that it shows that students may be able to transfer rhetorical strategies from the business communication classroom to the workplace. It also seems as though Beyoncé showed a developmental
trajectory of learning that improved during her time in the business communication classroom, and helped her in her internship. As we have seen with her creative work in the beginning of the semester, to her specific audience analysis in her final project, to her audience-based writing in her internship, Beyoncé portrayed a trajectory of development that showed she was able to develop those skills throughout her time in this project. Her work in her internship was much stronger than that of what she wrote at the beginning of the semester in my business communication course, and she had a greater understanding of her audience in her internship writing (as we can see from the mostly minimal comments from her co-workers). However, there are many factors that may have impacted how she transferred and developed so effectively. These factors are discussed further in the discussion chapter (chapter 7).
CHAPTER 5
ANNIE: A STORY OF AUDIENCE AND PERIPHERALITY

This chapter will first analyze Annie’s work within my classroom, including her first and final assignments and her screencast reflections. To answer the research questions and discover in which contexts Annie was able to transfer knowledge from the business communication classroom to the workplace, I analyzed Annie’s documents and screencasts. I coded her work for use of and discussion of rhetorical strategies, and any evidence of “transfer talk” (Nowacek, 2013). The rhetorical strategies that I analyzed were multiple audience awareness, variable audience needs, sense of purpose, organization, professional appearance, and style (Dyke Ford, 2004).

At the beginning of this project, I decided to also analyze my participants’ uses of process strategies. The process strategies that emerged from the data were invention and weighing options. Although these first emerged from Annie’s data, and seemed promising, I eventually decided to not use those coding categories, as I was not able to learn much from the data on those categories. It was interesting that Annie was using the term “brainstorming” (possibly from composition pedagogy), but as I went through the data in my iterative process, I realized there was not enough there to show me how my participants were transferring learning.

I also conducted an analysis of her work in her internship, following her participation in my class. I used the same methods (the aforementioned rhetorical strategies) of analysis for the documents provided from her internship.
The second part of the analysis was “Transfer “Talk” (Nowacek, 2013). To find more information about how Annie described and perceived her own writing, I turned to Annie’s screencasts to see/hear how she talked about her own work. I wondered if this third part of analysis would shed some light on the kinds of meta-awareness that my participants had of their own work. I analyzed Annie’s words for evidence of what Nowacek (2013) calls “Transfer Talk,” which she defines as, “Any talk through which individuals connect knowledge, strategies, attitudes and identities previously associated with an earlier context to a new context.” I analyzed Annie’s screencasts for evidence of these four “transfer talk” categories:

- Stories about themselves/Identity (self-descriptions/identity statements)
- I remember/ I was taught
- Questions framed as absolutes
- Gut feelings (it didn’t feel right)

**Theoretical Lens**

The theoretical lens I use here is Legitimate Peripheral Participation (LPP) (Lave and Wenger, 1991). Lave and Wenger (1991) describe their idea of LPP as “an analytical viewpoint on learning, a way of understanding learning” (p. 40). This lens helps me to better understand three different instances where Annie participated in a community of practice, specifically, to shed “a new light on learning processes, and by drawing attention to key aspects of learning experience that may be overlooked” (p. 41).

I also used Activity Theory, as it helps us better understand how participants learn in various activity systems (here the systems of school and work). In these activity systems, the main form of participation was through writing. Lastly, I decided to use Grounded Theory to address any other issues or themes that came out of the data that
might not be covered by existing theory. The instances of Annie’s participation have been split up into themes that were found in the data.

**Description of Participant**
My first participant in this study was Annie. Annie took my Business Communication course when she was a junior in Marketing. She was a very engaged student, who participated well in class and worked hard to improve her communication skills based upon my feedback. During classroom discussions, she listened carefully before raising an interesting point or asking a thoughtful question. Annie also collaborated effectively during the final group project, which I will describe in greater detail later in this chapter.

The summer after she took my course, she found a 3-month internship at a science-based organization. Her position involved writing news articles and PR materials for the organization’s website.

**Documents Collected**

**The course**
From my work first as teacher (and participant), I was able to gather the following documents from Annie:

- The first major assignment from my Business Communication class -- a messages packet with negative/positive messages for various audiences. Students are given a fictional situation, where they have to act as the manager and solve a mix-up in shipping. In the scenario, two products are mixed up and sent to the wrong customers. Students have to write documents not only to the customers, but also to the shipping manager, their supervisor, and draft a change in policy for the entire company, so this mistake does not occur again. They have to give each audience member the information that they need, but they also have to decide the genre for disseminating that information, like email, memo, or business letter (Appendix O).
- The screencast reflection on that assignment (I prompted them to answer a few questions including: How did this assignment go for you? Did you run into any issues? Where? How did you overcome them?) (Appendix P).
- My Screencast giving her feedback on her Assignment #1 (Appendix Q).
- The final project for the course. Annie and her group worked with a local artist from her hometown. He and his family owned a small pottery store where they sold the items that he created. Annie had worked for him the previous summer and was familiar with the store, the customer base, and the needs of the artist and his store (Appendix R).
- The final reflection on the last assignment for the class, which was a client-based assignment. In Annie’s case, it was working with a local artist’s store, helping him to market his products better (Appendix S).

In my class, Annie was, without a question, a full member of the community. When I refer to her as a full member, I refer to Lave and Wenger’s (1991) explanation: “we mean to draw attention to the point that learners inevitably participate in communities of practitioners and that the mastery of knowledge and skill requires newcomers to move toward full participation in the sociocultural practices of a community” (p. 29). This movement is a process, but the university classroom is particularly a low stakes activity system (community). This community was made up entirely of business majors (Annie’s peers), and myself (the instructor). Annie was a full participant in this community as she was a member of the class, and participated in class discussions and class projects. There was no doubt that Annie belonged in that space. Within the business communication classroom her identity was that of business major student, specifically a marketing major. This was true all the way from beginning of the semester, to the end of the semester when Annie was working on the final project with her group. The activity system of our
classroom can be represented like this:

![Classroom activity system diagram](image)

(Figure 7: Classroom activity system)

The tools and objectives that this activity system had were typical of most classrooms. However, the activity system of a classroom is very different from most workplaces, where the objective is not to get a good or passing grade and learn about communication, but to grow as a company and/or increase customer base.

At the end of the semester, I noted that not only was Annie a full participant in her own group, she ended up leading her group. Lave and Wenger (1991) note that, “Full participation is intended to do justice to the diversity of relations involved in varying forms of community membership” (p. 37). She was the contact person for communicating with the client, and had a deep understanding of the client and how his store worked from her summer job with him. Annie pitched her client idea to her fellow group members and they all agreed that they would like to work with the potter as a client. During that final group project, Annie not only belonged to that community (her group), but she was
leading the community in their final project efforts. She had access to all of the important roles and pieces of communication within that group.

The internship
Annie’s internship experience was that of an intern within a science-based organization. She was tasked with writing up news or PR articles that would later be published on the science organization’s website. If we were to map the Rhetorical Triangle of Annie’s internship in Activity Theory terms (Russell, 1995), it would look something like this:

(Figure 8: Annie’s internship activity system)

Annie was able to share with me some documents and a screencast from her internship experience, including:

- An article that Annie wrote for her internship, which was an outreach position in a science-based organization. She shared with me an article that she had written towards the end of her internship. This article
described a new science-based game that her organization was promoting, with supervisor comments (Appendix T).

- A screencast reflection on that article (I gave participants the following prompts: Describe how you wrote this document. Did you face any issues? How did you work through them?) (Appendix U).
- A recording (transcription) of Annie and her supervisor, as they discuss the comments (Appendix V).

When Annie was working in her internship, she was literally on the periphery of the organization. She was not a scientist, nor from a scientific background. Instead, what she did was write up the scientific findings of others in the organization. Her position was only for three months in the summer, and she did not have very much interaction (participation) with the rest of the community, other than her direct supervisor. Lave and Wenger (1991) note that this position on the periphery can be difficult: “As a place in which one is kept from participating more fully – often legitimately, from the broader perspective of society at large – it is a disempowering position” (p. 36).

**Overview of Annie’s Work**

Overall, Annie showed from her work in the business communication classroom that she was capable of and aware of how to use her rhetorical strategies (even if she did not think of them as rhetorical strategies) in writing situations with which she was not familiar. From a teacher’s perspective, Annie was doing all of the right things: she was using what we had discussed in class, using her textbook and other sources for reference, and was reflective about her rhetorical choices in her screencast reflection. From a researcher’s perspective, Annie was a fascinating participant, because she was flexible in her use of rhetorical strategies, and was able to discuss her reasoning behind some of her choices in her screencasts.
Themes

When I first began analyzing Annie’s work, I noticed some interesting trends in Annie’s use of rhetorical strategies. The first theme that I found was that Annie was able to effectively use some rhetorical strategies from the beginning of her coursework all the way to the end of the course, specifically her ability to focus on audience awareness and audience needs effectively, but was not able to use it as effectively in her internship. The second theme I found was the difficulty that Annie had with her placement or physical location within her internship and how that actually kept her working on the periphery (or outside) of the organization. The third and final theme I found was that of identity. It did not seem that Annie identified with the organization she was working for. I discuss each theme further in the following sections.

Theme 1: Successful audience analysis

Multiple Audience Awareness and Variable Audience Needs

First, I looked for specific instances where Annie was able to write to multiple audiences, and then how she was able to reach those audiences’ needs. Document 1 was the first assignment of the semester, where students were asked to write to various audience members, including peers, a supervisor, and customers to fix one miscommunication error. Although this assignment specifically required that students write for various audiences, Annie was still able to address each audience effectively, and gave them each specific information that they needed. What many students have struggled with in this particular assignment is figuring out what exactly each audience needs to know, so they avoid simply copying and pasting information from document to document. In this first assignment, Annie was able to write different documents and tailor
them to her various audiences’ needs, for a fictional situation. She chose which genre to use for each audience and she also decided which information each audience needed to know. For example in the messages packet assignment, Annie did not give the entire background of what had happened to the shipping manager; she just told him what he needed to do: “Your actions are to send Ms. Williams the GPS system (Harcourt, Iowa; #199412); you also will need to send Mr. Smith the SD Card reader and a $50 gift card (Lincoln, Nebraska; #199413). You should be receiving the GPS system in a week.” She only conveyed the information that the shipping manager needed.

She was also able to express her choices from this first assignment to me very clearly in her reflective Screencast (#2), explaining that the customers only needed certain pieces of information, but not the entire backstory of the problem. She noted that giving some information may actually hurt the reputation of the company:

I also decided that Miss Williams didn’t need to know that we shipped her GPS to the wrong person, because that might have given her the wrong idea that Tech Co was careless, and I decided that probably wasn’t the best reputation that we could give our company, since she might need future orders from us (taken from her first screencast).

Annie noted that she also gave the customers clear directions, so they would know exactly what to do. Annie very carefully described her decisions in her first Screencast.

In order to find out how Annie was using other rhetorical strategies, I then looked for Annie’s use of Purpose and Organization. In Annie’s first assignment for the course (#1), she very clearly stated the purpose of each document at the beginning of each piece. For example, when explaining the mix-up between the two customers’ products, she
started the letter with a pleasant buffer, and then informed the customer, “Unfortunately, your latest purchase from TechCo was shipped in error, and we regret to inform you that you will need to return this shipment (GPS system). However, we will pay for your return shipping and give you a $50 gift card for future purchases.” Annie then continued to explain the situation and what the customer could expect. After reading her documents, each audience (although fictional) would be able to know what to expect from the company and what he/she needed to do. In fact, in each document that Annie wrote for this first assignment, the purpose was apparent for each audience. The customers knew what to expect and how the company was going to remedy the situation, the shipping manager knew what he needed to send, the supervisor was assured that the problem was being taken care of, and the employees in the company were alerted about what they needed to do to prevent this problem from occurring again.

Final project

At the end of the semester, Annie worked with a small group of fellow students on a client-based project, a marketing campaign for a local artist and his family-owned store from her hometown. Annie noted in her Screencast reflection that she wanted to make their work reflect his store and his values, so the marketing campaign that they put together for him was “creative and artsy,” but also focused on his need to know more about “different technologies… prices and analysis.” Annie also noted that her group decided not to focus on more information regarding pottery, as that was his area of expertise. Her group created a detailed marketing plan to increase revenue. Annie successfully analyzed what her audience, the local artist, needed. However, not only did
they carefully analyze the artist’s needs, they also analyzed his audience’s needs (his customers), and how he could better reach out to them.

Annie also noted that her group’s analysis of the client’s needs “led us to organize our proposal in two different sections, one focusing on technologies and the other centering on promotions and advertising.” Annie’s group focused on their organization of information very intentionally. Annie wanted the group’s research and recommendations to be as useful as possible for her client.

**Internship**

When Annie participated in her internship community, she also had a firm grasp on audience analysis. She shared with me an article that she had written towards the end of her internship. This article described a new science-based game-application that her organization was promoting. Annie wrote this particular piece for a wide variety of audiences, including kids who like games, their parents, people who are interested in STEM, as well as the science organization itself. To address each of these audience members’ needs and interests, she included information like quotes from scientists, the date that the game would be available, and noted that a teachers’ guide would be included with the game. However, even though she understood who those audiences were, she seemed to have a somewhat difficult time reaching all of them, and her supervisor gave her extensive feedback on her draft.

It seems that Annie was able to successfully analyze her various audiences’ needs, beginning with a fictional audience in the beginning of the semester all the way to a real client at the end of the semester (the artist). It also seems as though her position as a full participant in the community may have assisted Annie to help her better understand what was expected of her. Even though each situation and each specific participation instance
was different, Annie was able to participate effectively. As Lave and Wenger (1991) remind us, “Participation is always based on situated negotiation of meaning in the world. This implies that understanding and experience are in constant interaction – indeed, are mutually constitutive” (p. 51-52). Annie’s skill of effective audience analysis was one that she practiced while she was interacting within her various communities, and seemed to improve upon in the business communication classroom, as we can see from her adequate work in the beginning of the semester (in the messages packet), to her very helpful final project for the potter. Not only was Annie able to understand the potter and his business thoroughly, she clearly understood how her group’s research could potentially help him and his business. The final project became a very useful guide for him.

**Theme 2: Working on the periphery**

In Annie’s summer internship, she was working closely with her direct supervisor, and writing news-related articles. Typically, interns, as legitimate peripheral participants learn by practice. “Learning appears to have a characteristic pattern. There are strong goals for learning because learners, as peripheral participants, can develop a view of what they whole enterprise is about, and what there is to be learned” (Lave and Wenger, 1991, p. 93). However, Annie typically wrote articles on content matter that she was not familiar with. Because Annie was not a scientist herself, or in a scientific field, she was often located at the periphery of the science organization. In her Screencast reflection that accompanied the article that she wrote for her internship, Annie reflected that this was a somewhat difficult piece (the article) to write, simply because she was dependent upon the subject matter experts in that field. Often, Annie had to follow up with those experts when she didn’t understand the topic or how to explain it, and had to
wait for a response from those experts. In her Screencast, she noted that it was difficult when “I don’t always entirely understand what they’re working with, but I have to try and figure out the best way to describe that.” So even though Annie had excellent audience analysis skills and the ability to understand what those audience members needed to know, it was still difficult to write to them. Annie could only participate on the edge of the community, and was unable to do what Lave and Wenger (1991) describe as “participation as a way of learning – of both absorbing and being absorbed in – the ‘culture of practice’” (p. 95).

I was able to read the feedback that Annie’s internship supervisor wrote for her, and I was surprised (and impressed) by the incredibly detailed feedback that her supervisor gave. However, Annie’s supervisor noted that she actually was not including enough information for her audiences. Her supervisor wrote comments like, “Explain what it means,” “Why is this team unique?” and “audience needs more info.” Annie did seem to struggle with the very difficult task of informing a variety of audiences with the new information regarding the science-based learning application. Even though Annie seemed to understand what those varied audiences needed and wanted, it was more difficult to be able to reach all of them in that one article from the boundary of the periphery.

**Purpose and organization**

When Annie was writing her article for the internship, she did not clearly state her purpose for writing at the beginning, something that her supervisor also pointed out in the comments: “Good title, but the first section of this story is not about the students who created the app. Maybe move this title later in the article when you discuss the
uniqueness of the team who made the app.” Annie seemed to struggle a little bit with the purpose of the article, perhaps because it was a topic that she was not very familiar with. Annie was not the SME (subject matter expert) in this situation, although she had been when she and her group worked with the local artist from her hometown.

Another issue that surfaced with the article for the internship was the organization of it. She talked about the release date, the audience for the app/game, the team who created it, and then a conference that was held. It did not flow well and some of the sections were confusing. Annie’s supervisor also noted this lack of organization, and encouraged her to add a sub heading in one section, and to move a sentence around, noting: “This should be the beginning of the first sentence.” Annie was able to use this feedback to ensure the revised version of the article was vastly improved.

Professional appearance and style

I then analyzed her style/tone in Annie’s writing. Annie described her style in the internship article as “news article,” but her supervisor noted that Annie was using passive voice quite heavily throughout the article and suggested, “Nix passive voice all the way through this paragraph.” When Annie and her supervisor discussed style, the issue of passive voice came up during their discussion session. Annie asked, “What is passive voice?” Her supervisor responded- “Ok, so passive voice is when you use a ‘to be’ verb, so ‘is.’ So you want to take out that ‘is’.” Based upon that feedback, Annie was able to revise the sentences where she had used passive voice. She worked well revising with clear feedback, both in my class and in her internship.

It may be that some of the information that Annie received was written in passive voice, in which case, she merely emulated what was given to her. It is very common in
scientific fields to use passive voice in research. It may also be because passive voice distances the author from the activity, and she may have felt distanced from the work. Whatever the reason, Annie seemed to feel more comfortable using it in her article, but had used more active voice with her client from the final project, perhaps because she actually knew the client and was involved in the research for that client.

It is possible that Annie had a harder time organizing and presenting the necessary information in the article simply because she did not know all of the information, and she had to rely on SMEs (subject matter experts) for the details. Also, Dias et al (1999) note that students may face difficulties when writing in their new communities: “Student interns and newcomers are unlikely to gain easy or immediate access to what may pass for ‘common knowledge’ within workplace communities” (p. 226). It seemed that Annie was still working on becoming acclimated to her new community and how she was expected to write within it. It also seems as though Annie was operating on the very periphery (in terms of LPP) of that community and was not completely able to gain full membership to it during that period of time. To become a full member of this new community, Annie needed to be integrated into it and more fully involved within it. Lave and Wenger (1991) note

-learning only partly—and often incidentally—implies becoming able to be involved in new activities, to perform new tasks and functions, to master new understandings. Activities, tasks, functions, and understandings do not exist in isolation; they are part of broader systems of relations in which they have meaning. These systems of relations arise out of and are reproduced and
developed within social communities, which are in part systems of relations among persons (p. 53).

This participation in the new community is key for participants to be able to become a real part of the community, but because Annie was kept at the edge of that community, she was unable to really become a full member during her internship.

In the chapter about apprentices, Lave and Wenger (1991) mentioned, “The physical layout of a work setting is an important dimension of learning, since apprentices get a great deal from observing others and being observed. Some meat departments were laid out so that apprentices working at the wrapping machine could not watch journeymen cut and saw meat” (p. 78). This issue of physical location and not being able to interact with the community was difficult for the apprentice butchers because they couldn’t see what others in the organization were doing and how they were doing it. They were somewhat kept to themselves. Annie was also kept on the periphery of the organization. Her desk was at the edge of the organization and she didn’t seem to be as integrated into the organization as she could have been.

**Theme 3: Identity**

Identity/talking about self

As I was analyzing the “transfer talk” of Annie’s screencasts, one glaring omission from her screencasts was any indication of identity statements wherein she showed identity with her new community of practice—the science organization. When Annie did mention her internship, she seemed to be very removed from the organization itself. She talked about the members of the organization as “they” and “them,” but never included herself as part of that group. Annie noted that she didn’t “entirely understand what they’re working with” (they being other people in the science organization). Many
of the projects that were researched and completed at this organization were very
technical or scientific in nature, and often funded by large science grants.

Annie also seemed to become frustrated by her lack of content knowledge and the
fact that she had to rely on others for information. She noted that it was difficult when her
contacts did not get back to her right away, but stated that she would “have to make sure
to resend those [emails] if I don’t get a response in a certain amount of time” (taken from
her internship Screencast). If Annie had any questions about the projects or descriptions
that needed clarification, she would have to wait for the SMEs to get back to her. This
can be very frustrating for anyone working with SMEs.

I used screencasts as a way to have my participants talk about their own writing,
in a way that could possibly reveal strategies that they were using, but also as a way of
sharing their stories. After all, “Language is a part of practice, and it is in practice that
people learn” (Lave and Wenger, 1991, p. 85). Not only does language help us learn, but
talking about our own learning stories helps construct identities. The screencasts help
participants to understand how they are becoming part of their new community: “For
newcomers then the purpose is not to learn from talk as a substitute for legitimate
peripheral participation; it is to learn to talk as a key to legitimate peripheral
participation” (p. 109).

From Annie’s internship screencast, it seemed as though Annie’s identity had not
shifted yet and that she did not identify with that new community of practice because she
did not come from a scientific background, but a marketing one. This may be due to
Annie’s position in the internship for only 3 months, which may not have given her
enough time to fully acclimate to this new community of practice. Lave and Wenger
(1991) note that “The need for such analysis motivates our focus on communities of practice and our insistence that learners must be legitimate peripheral participants in ongoing practice (emphasis mine) in order for learning communities to be engaged and develop into full participation” (p. 64). This ongoing practice is integral to full participation and integration. Three months may not have been enough time for Annie to become part of that community.

**Discussion**

While Anson and Forsberg (1990) and Brent (2012) found that acclimation to a new community of practice was dependent upon a sufficient amount of time and/or physical location within the community, and Lave and Wenger (1991) noted that identity was directly tied to one’s participation within a community or practice, I found both to be true in Annie’s case. Not only did Annie need more time and more involvement within the science organization, she also did not feel like a part of that community and therefore struggled more with becoming a part of it. If Annie had received a full-time job within that organization after the internship, she would have had better opportunity to become a part of the community. It is important to remember that new employees need time and practice for their identities to fully shift into their new roles.

To review, I’d like to come back to the research questions that I posed originally:

- Through what school experiences did students report or appear they learned and developed the rhetorical strategies they used?
- Through what nonacademic work experiences did students report or appear to learn and develop the rhetorical strategies they used? (Dyke Ford, 2004)

To answer question 1, I was not able to find specific strategies that Annie transferred, but it seemed as though Annie was able to transfer some of her rhetorical flexibility
knowledge from the business communication classroom to her new internship. Annie seemed to have flexibility in her rhetorical writing strategies, and used them effectively at the beginning of the semester, at the end of the semester, and in her internship. This may have been a skill that she honed while she was in my class, as those rhetorical strategies were things that we discussed (and I graded) in class. She seemed to specifically excel in audience analysis (theme 1), especially in those situations where she was a full participant in the community of practice. This was something that Annie consistently developed throughout her class work in my course. Annie also was very good at finding examples when she was faced with a new writing situation. Annie effectively wrote to her audience for her final project, and crafted a very helpful research project for her client. It is important to note that she seemed to have transferred some of those skills from the beginning of the semester, as her final project seemed to have a higher level of rhetorical awareness than when she started off the semester with the first project (the messages packet). She also seems to have brought some marketing knowledge with her when she completed the final project. Although she did naturally struggle with the ambiguity of writing to a large and varied audience in her internship, she did seem to bring some rhetorical strategies with her from my classroom, like her focus on audience needs and her flexible ability to use her resources well to find other writing examples within the organization.

Annie did not specifically reference knowledge that she learned in the business communication classroom, but in her final reflection, she noted:

My favorite part of the course was the final project. Although it was a lot of work to create and implement different ideas, it was exciting for me to see these ideas
come to fruition. I know that I will be applying many of these skills in the future, especially the different writing skills I took away from it (Final Reflection).

Annie was very aware of the importance of the skills that I had taught in my classroom. She also seemed to be appreciative of the various writing skills and strategies that she had learned, even though Annie did not specifically attribute skills that she used in her internship to those she practiced in my class.

So, even though it is possible that Annie transferred some skills from the business communication classroom to her internship, she did not specifically discuss it. Similarly, Annie did not note that she had learned these strategies from other, nonacademic contexts (research question two). She did, however, have a firm grasp on certain rhetorical strategies that also seemed to improve as time went on. Annie had the rhetorical flexibility to know that she needed to use the resources that were available to her in that new context, and she did. This was a strength of Annie’s, both in the business communication classroom and in her internship. This is an example of Annie’s developmental trajectory of learning, that she practiced and developed during her time in my business communication classroom, but which she had a harder time developing in her internship work.

Annie’s work across the span of approximately a year may be indicative of what DePalma and Ringer (2011) call Adaptive Transfer, which is the “conscious or intuitive process of applying or reshaping learned writing knowledge in order to help students negotiate new and potentially unfamiliar writing situations” (p. 135). She seemed to be unconsciously applying and reshaping some of this learned writing knowledge from my course (and quite possibly from other courses as well) to her new situation, her
internship. She was rhetorically flexible and knew where to look for find other examples and answers to her questions. She was also curious, and willing to learn, and often asked her supervisor questions when she wasn’t sure how to structure a document. It does not seem as though Annie experienced a “consequential transition” (Beach, 2003), as opposed to the experiences of the other participants.

Although Annie was aware of her multiple audiences, and wrote carefully for those audience needs (even keeping them in mind during her writing process), it should be noted she still needed normal detailed feedback in her internship. Her supervisor noted that she actually was not meeting all of her audience’s needs, by not providing enough information. Her supervisor also commented on her lack of organization and the passive style she was writing in. It is also important to note that Annie was kind enough to share with me a draft of this article (with comments) and not the finished product.

While it seems that Annie did not transfer specific rhetorical strategies to her internship from the business communication classroom, one of the limitations of this study was that I was only collected one workplace document, which may or may not be indicative of that participants’ typical work. It is very possible that Annie was able to transfer rhetorical strategies to her next writing assignment, and many thereafter, but I do not have data for that.

Also, I do feel it is important to note that Annie faced many obstacles in her internship, which may in fact have hampered her ability to transfer learning effectively from the business communication classroom to that particular workplace. I discuss these factors further in the Discussion Chapter (7).
CHAPTER 6
SAM: THE MOTIVATED LEARNER

This chapter analyzes the work of Sam, from his written and reflective work in my classroom to his new job at the company that he and his two friends started. I will analyze writing samples from Sam’s work at the beginning of the semester, to the end of the semester, and then to his new job so I can map out a general idea of how Sam writes, how that communication changed over time, and how he may have transferred learning to new writing situations.

I’ve coded Sam’s work in two parts: for use of and discussion of rhetorical strategies and evidence of transfer talk. The rhetorical strategies that I analyzed are multiple audience awareness, variable audience needs, sense of purpose, organization, professional appearance, and style (Dyke Ford, 2004).

The second part of the analysis was “Transfer “Talk” (Nowacek, 2013). To learn more about how Sam described and perceived his own writing, I turned to Sam’s screencasts to see/hear how he talked about his own work. I wondered if this second part of analysis would shed some light on the kinds of meta-awareness that my participants had of their own work “Transfer Talk,” is defined as, “Any talk through which individuals connect knowledge, strategies, attitudes and identities previously associated with an earlier context to a new context.” I analyzed Sam’s screencasts for evidence of these four “transfer talk” categories:

- Stories about themselves/Self-diagnoses (I go on tangents/identity statements)
- I remember/ I was taught
- Questions framed as absolutes
- Gut feelings (it didn’t feel right)
I also decided to use Grounded Theory to find any other themes that may have emerged, that were not covered under existing theory. I did not want to limit my findings to those which may come out of already pre-set coding categories.

**Theoretical Lens**

The theoretical lens I use here is Legitimate Peripheral Participation (LPP) (Lave and Wenger, 1991) and Activity Theory. Lave and Wenger (1991) describe LPP as “an analytical viewpoint on learning, a way of understanding learning” (p. 40). This lens helps me to better understand three different instances where Sam participated in a community of practice, specifically, to shed “a new light on learning processes, and by drawing attention to key aspects of learning experience that may be overlooked” (p. 41).

Activity Theory helps us better understand how participants learn in various activity systems (here the systems of school and work). In these activity systems, the main form of participation was through writing. The instances of Sam’s participation have been split up into themes that were found in the data.

**Description of Participant**

Sam, an Agriculture Communications major, was a very outgoing student in my class and often enthusiastically led the class discussion. He was always prepared and always excitedly voiced his ideas to the rest of the class. Sam was very much an entrepreneur, and had many creative ideas that he shared with the class. He took this course right before his graduation.

**Documents Collected**

**The course**

From my work first as teacher (and participant), I was able to gather the following documents from Sam:
The first major assignment from my Business Communication class -- a messages packet with negative/positive messages for various audiences. Students are given a fictional situation, where they have to act as the manager and solve a mix-up in shipping. In the scenario, two products are mixed up and sent to the wrong customers. Students have to write documents not only to the customers, but also to the shipping manager, their supervisor, and draft a change in policy for the entire company, so this mistake does not occur again. They have to give each audience member the information that they need, but they also have to decide the genre for letting them know that information, like email, memo, or business letter. (Appendix W)

Proposal- This document detailed his idea for the final project. Instead of working with an outside client, Sam instead chose to research and write about a business opportunity. (Appendix X)

Progress report- This document detailed Sam’s progress in the final project, specifically, what he had already finished and what still needed to be worked on. (Appendix Y)
The activity system of our classroom can be represented like this:

(Figure 9: Classroom activity system)

The tools and objectives that this activity system had were typical of most classrooms. However, the activity system of a classroom is very different from most workplaces, where the objective is not to get a good or passing grade and learn about communication, but to grow as a company and/or increase customer base.

**The new company**

Sam and his two friends actually started their own agriculture-service company while they were still getting their undergraduate degrees. They managed to work out many of the details for their company before they even graduated. Sam carefully enrolled in classes that he knew would help him to start the company. He also joined the Entrepreneur Club on campus. When he first graduated, Sam worked at his own company
part time only, but when I checked in with him in mid-2015, he and his friends were all working full-time at their company and had quit their other part-time positions.

For Sam’s job communication, I analyzed the following pieces:

- An email that Sam wrote for his company, trying to recruit teachers to speak or present at a course they were offering, and a memo that Sam wrote for his customers, informing them of some updates in their technology. (Appendix Z)
- A screencast reflection on those two pieces, where he describes both of them for me. (Appendix AA)

To get a better idea of Sam’s new activity system (the new company), I mapped it out here:

(Figure 10: Activity system of Sam’s workplace)
Themes

When I first began analyzing Sam’s work, I noticed that the themes I found were very different from those of my other participants. The first theme that I found was a straightforward style. The second theme was innovation and entrepreneurship. The third theme was motivation.

Theme 1: Straightforward style

Sam wrote in a very straightforward and clear manner. In his writing, he gave most of his audience members very straightforward information, even at the beginning of the semester in my class. For example, in his first assignment for the course, he wrote in his memo (a part of the Messages Packet assignment): “Employees in the shipping division must receive signature (sic) from a division manager on the bottom of the bill of lading for items equal to or greater than $1,000.00. A copy of the invoice is required also to cross reference with the bill of lading.” He wrote this in a very direct fashion and stated his ideas for addressing the issues right away. Sam rarely used a buffer, but would clearly state his point almost immediately.

Another example of Sam directly addressing his audiences’ needs is from this excerpt from a letter to his fictional customer (also from the Messages Packet):

Within three business days you will be receiving a package containing the Modem Mediocre L driver for your Delappc computer. This Modem Super L is not the correct order that you placed on January 25, 2013 with TechCo, LLC.
He was able to clearly and directly address what his customers needed to know regarding their orders. He did not employ the use of any buffers to soften the news; he simply gave the customer clear information about what had happened.

Sam had an excellent use of you-attitude, and had an overall professional tone, as we can see in this other letter excerpt from the Messages Packet:

In the event you decide not to keep the Modem Super L driver, TechCo offers you an online store credit of $1500.00. Please see enclosed postage label and shipping instructions for returning the Modem Super L driver if this is the route you choose.

Sam also used a clear and concise style of writing, keeping most of the pieces of communication brief and to the point. He did not waste time or space adding any extra details.

Later, in his new job, Sam also made his purpose in writing very apparent at the beginning of each message. He wrote to his audience members, “You are receiving this email because you or someone recommended by you taught a portion of the class (name omitted) last March” (from job letter).

Sam later reflected that his whole purpose was to find teachers who could possibly teach this course that they were offering. He said, “I was looking, again, for them to be a part of this school and so my main goal was to give them the dates, which you can see it in here, and then just the reason itself why they’re being emailed, right here at the top.” Sam knew it was important to give his audience the reason for writing at the beginning of the message, so he focused on that.
In his workplace screencast, Sam also noted that his company would “periodically send out memos to our customers, just to update them on a few things.” He continued, “This is for some updates and development things.” He wanted to make sure that the company kept in good contact with their customers to maintain that positive working relationship with them.

Sam also knew that his emails should be concise, and noted, “what I did was just threw in this quick sentence at the end, trying to move forward the communication.” He didn’t want to waste his audience’s time, and so he made his main point quickly, and then ended with what he wanted the reader to do (also known as a call-to-action). Brent (2012) also found that one of his participants (Emma) felt that her writing skills had benefitted from her internship work. Brent (2012) noted, “The torrent of emails to clients had, she felt, sharpened her ability to be concise” (p. 577). This practice seemed to help Sam.

Sam seemed to develop this skill more and more during the duration of the class, but certainly developed it even further as he was working on his new documents for his clients and potential clients.

Professional appearance and style
Sam had to create many of these documents on his own for his new company, but knew that creating a professional look was imperative. His email was looked like a typical email, and was short and to the point.

One thing that Sam did to make his documents look very professional was to create a logo and add it to each piece of documentation. In his screencast, he reflected, “so there’s contact information here, a logo, a logo here, and then, at the very end, it would list the three account managers, and our respective contact information.”
preserve his company’s privacy, the logo and contact information were deleted from his documents that he shared with me.

The way that communities communicate shapes the way they function. Winsor (2004) reminds us, “The vocabulary of the discipline and the workplace served as a tool into which knowledge had been distributed” (p. 20). However, because Sam and his friends were creating their own new community of practice in their company, there was no standard communication practice to start from. There were certain genre conventions, so Sam knew he could draw from those to create a new “standard” for their company. As he noted in his workplace screencast:

For the most part, these headings, those were just decided on by myself, uh, got a little bit of feedback from my co-workers, but in this case, this is for a company that I started as a student, so there really wasn’t someone above me to say, ‘hey, here’s our usual memo format, why don’t you just click and drop in the, copy and paste in the information, and then go?’ So, this truly was kind of a start from scratch, as far as our company goes.

The nice thing was I did have that template, if you will, or that idea from my English class. And then right here at the end, knowing how to, if I do have to do paragraphs, very quick and concise, this one isn’t that long, umm, but for the most part it just gives a general overview of what we are looking for as a company (workplace screencast).

So, even though they were starting completely from scratch, Sam knew that if he used a professional-looking template for his business documents that would be sent out to clients
and potential clients, they would be taken seriously as a professional company. That professional identity was obviously very important to them. It seems as though that professional, clear style was something that Sam was able to work on during the class, and then put to good use in his new company’s documents.

**Theme 2: Innovation/entrepreneurship**

Out of my four participants, Sam was the student who most embodied what we might call the entrepreneurial spirit. As Drucker (1985) says, “the entrepreneur always searches for change, responds to it, and exploits it as an opportunity” (p. 28).

Entrepreneurs have to be aware of new opportunities and how they will work in the current market. Entrepreneurs must also understand how all stakeholders will be involved in it. Sam’s final project was actually an opportunity project that he did on his own, without any other group members. Instead of finding an actual client to work with, Sam came up with a unique business idea that he or anyone who was interested could undertake. He had a creative and innovative idea of promoting and researching a new food stand business that would be located in the local campus area. The food stand would sell what he called “pizza cones,” which was a pizza, but in a cone shape for easier street food eating.

Sam showed a very creative entrepreneurial spirit in this final project. Not only did he propose to create a new project (instead of addressing an already existing communication need), he also researched everything that would be needed to go into it. His proposal for this project was incredibly detailed, as shown in the following schedule chart:
(Table 6: Sam’s research timeline for final project)

**Timeline of Research:**

<table>
<thead>
<tr>
<th>Date Completed</th>
<th>Estimated Time</th>
<th>Event</th>
<th>Contact</th>
</tr>
</thead>
<tbody>
<tr>
<td>4/11/13</td>
<td>12 working hours</td>
<td>Production feasibility trial; pricing of equipment; trial of products.</td>
<td>Hobart Manufacturing for production equipment; Self</td>
</tr>
<tr>
<td>4/14/13</td>
<td>12 working hours</td>
<td>Market research for pricing; estimation of traffic in proposed selling area</td>
<td>Personal interviews with ISU students and Welch Avenue attendees</td>
</tr>
<tr>
<td>4/15/13</td>
<td>8 working hours</td>
<td>Documentation of costs for production of cones; financial planning for costs and profits to determine breakeven; setting of menu that reflects costs and breakeven;</td>
<td>Self</td>
</tr>
<tr>
<td>4/16/13</td>
<td>1-2 days</td>
<td>Food inspection permits and licenses associated with street food vendors; start application for permits if needed; find requirements for having vendor cart</td>
<td>Iowa Department of Health; State of Iowa Department of Inspections and Appeals; Smiles and Gyros, Inc.</td>
</tr>
<tr>
<td>4/16/13</td>
<td>1 hour</td>
<td>Determine additional personnel needs</td>
<td>Self</td>
</tr>
</tbody>
</table>

He ended his proposal with this call to action: “With your approval I will proceed with moving forward and accomplishing the aforementioned tasks, as well as including any additional ideas and thoughts you may have.” Sam was very confident that with his careful research and hard work, he could actually start this business, or even convince a street vendor to try selling this new food idea. The extensive amount of research that Sam had put into this project stunned me. Not only did Sam look into the equipment costs and actually complete a trial run of cooking the product, he also compiled the information for the street vendor licenses, permits, and state requirements for health inspections. His
creative and entrepreneurial ideas in this project stuck out in what typically was a local, client-based writing assignment.

**Theme 3: Motivation**

One factor that helped Sam immensely with his ability to transfer learning was his high level of motivation. After the class was finished, Sam did things a little bit differently than his fellow participants, because he actually started his own small business with two friends right after he graduated with his undergraduate degree. He shared with me two documents that he wrote for his new company. The first was an email that went out to some of his contacts, as he and his co-owners were trying to find speakers to give presentations at a short course they were offering their customers. The email was to see if the possible speakers were available on a certain date and if they were interested in presenting. Sam noted that the audience was “a bunch of speakers from the University nearby.”

The second document was to his current customers, letting them know about some technology changes that had been made within the company. To address those needs, Sam wrote, “If you have not been in attendance at a training session, please let us know and we can set something up,” and “We want you to feel comfortable running our software.”

Because Sam did not have a set format to use or templates that someone higher up in the company had used previously, he had to go back to things he had learned in my class, and he had to invent a new version of templates for his company. In his screencast he noted, “and the format right here especially was one thing that I was really struggling with. Being able to cross-reference those documents made it really easy… So, this truly was kind of a start from scratch, as far as our company goes.” Sam knew he needed to
make his documents look credible to be taken seriously as a new company, so he used templates and formats that he had learned in class to achieve that. He did mention that “There have been (sic) a lot of trial and error,” when it came to writing these new documents for his new company.

When it came to formatting his email, he noted in his workplace screencast that, “I copied and pasted and put together, but I, it was a really simple email.” This was a genre that Sam had used quite a bit during his time in my class, as well as others during his time at the university and he did not really struggle with it.

This is similar to what Brent (2012) found in his study with interns. He discusses one of his participants (named Amy) and how resourceful she was:

Like many of the students I interviewed, Amy was resourceful when she had to learn how to handle a new genre. A friend asked her for a reference letter, which was not something she had written before: I looked up sample reference letters on Google. . . . And so I took the information she gave me and sort of what you should put into a reference letter, from Google, and then I took one of the formats of my cover letters and just sort of sectioned it in. This response to an unfamiliar genre—find models and tip sheets (almost always supported by Google) and then adapt them as necessary for new purposes—turned out to be a common theme in these interviews and a major survival skill in both school and work (p. 571).

Sam was similarly very resourceful when writing to his clients for his new company. In his screencast Sam noted that, “I copied and pasted and put together, but it was a really simple email.” Because it was a genre that he was very familiar with and it was something that he had worked on, he knew how it should be basically set up, but did re-
use material that he had previously written, by copying and pasting it into the new email. However, Sam did have to organize the information and make sure it was clear for his audience, and had it separated into two basic paragraphs, an opening, and a closing.

In their research on motivation and transfer, Pugh and Bergin (2006) write:

Motivational factors can “influence initial learning in ways that either support or hinder transfer. Second, they can influence the initiation of transfer attempts. Third, they can influence persistence on transfer tasks” (p. 156). We can see evidence from Sam’s work that shows he was highly motivated to transfer what he had learned in my class directly to his new company’s documentation needs.

Sam had to start out writing documents “from scratch” as he said, and didn’t have prior documentation to lean on, except from the business communication course. He was very motivated to do well with his company, and this seemed to have influenced how he learned in my classroom. He knew that he would need this kind of writing knowledge so he would look professional.

The other thing that Sam noted in his screencast was, “There have been (sic) a lot of trial and error.” Sam did not simply try to write a document once and then send it off. He knew that he would go through revisions, and he wanted to work on them until they were ready to send out. This is similar to the third motivational factor that Pugh and Bergin (2006) note, which is they can “influence persistence on transfer tasks.” If Sam hadn’t been so motivated to help his company succeed, he would not have been so persistent with his writing, to try to make his documents better/more professional for his clients.
Sam also certainly had the opportunity to transfer his knowledge (the second motivational factor) from the business communication classroom to his new job, because it was obvious that he would need to communicate with his new clients. Sam was able to see the big picture of how his work in the business communication classroom could later help him in his new company. This opportunity to see how the work would need to be transferred from one context to the next was a key part of Sam’s motivation.

It seems that motivation was indeed a very big factor for Sam, and that all three of the motivational factors seemed to come into play in his situation.

**Discussion**

To review, I’d like to come back to the first two research questions:

- Through what school experiences did students report or appear they learned and developed the rhetorical strategies they used?
- Through what nonacademic work experiences did students report or appear to learn and develop the rhetorical strategies they used? (Dyke Ford, 2004)

For the first question, Sam clearly reported to have used many of the strategies that we used in my classroom. He brought up the issues of formatting specific documents, and noted that he went straight to his files from the business communication course to help him write the new documents that he needed for his company. Sam also had a strong motivation for doing so. Out of all of my participants, Sam is the only one who explicitly stated where he learned specific strategies and was able to reference them very clearly. He also noted why he used them and how that knowledge helped him. First, he discussed formatting, and then noted how he learned specific writing strategies:
Just the format in general, uh, knowing how to do things, honestly, I went straight to the uh, files that I had saved from my English 302 class (business communication) that I took while at Iowa State. And I brought in the format. Those classes, those files were taken pretty recently for me as well, and the format right here especially was one thing that I was really struggling with. Being able to cross-reference those documents made it really easy… The one thing that I do remember in keeping things together with the memos is pretty short and sweet and then breaking it up, rather than having this all be paragraphs…The nice thing was I did have that template, if you will, or that idea from my English class (taken from workplace screencast).

This is unique, because Sam was the only one of my participants who very clearly stated that he had learned these specific strategies in the business communication classroom, and intentionally used those same strategies to write in his new job. This is a very clear example of Sam successfully utilizing high road transfer, from one context to the next.

High road transfer depends on mindful abstraction from the context of learning or application and an intentional search for connections in a new context (Perkins and Salomon, 1988). Transversely, low road transfer refers to transfer that happens when there are obvious similarities from the two contexts. The transfer has been practiced so much it becomes almost automatic. High road transfer always involves reflective thought to make the connection between the two contexts. Sam was an unusual participant, because he took my class fully knowing that he would need to use the skills that I was teaching him. Therefore his learning was very intentional and purposeful. There have
been very few studies that have found a participant who exhibited such a purposeful and clear set of examples of high road transfer as Sam did.

Sam also exhibited what Beach (2003) calls “consequential transitions”-- “A transition is consequential when it is consciously reflected on, struggled with, and shifts the individual’s sense of self or social position” (p. 42). He consciously reflected upon his decisions with his new company, worked with his friends to create and keep their company going, and showed a clear sense of identity with his company. This transition was consequential for Sam, as it helped him become a business owner.

Also, Sam took a wide variety of courses while at the University, and there is some evidence that he may have learned some strategies from his other courses. He actually used some very specific marketing and supply chain management terminology in his final project for the course, and did so in a very effective manner. By using that kind of terminology, he was able to write those assignments in a very professional manner.

For the second question, while he did not report learning specific strategies from other sources, it is also very possible that Sam transferred some learning from other experiences. For example, Sam briefly mentioned to me that he had taken two internships the year before he graduated. It is possible that he was able to use some of that knowledge when he started his own company later with his friends. However, I do not have evidence to confirm or deny this.

Sam’s experience is similar to one of Dyke Ford’s (2004) participants, who discussed specific transfer of specific genres:

In their interviews students talked about transferring knowledge of genres and formats from their technical communication course more than anything else.
When asked what he learned in his technical communication course and whether or not he relied on this knowledge for writing assignments in the engineering course, one student claimed the following: “I learned how to write a memo, instructions, and reports.” After I asked this student to specify what he had learned about these various genres, he replied “I learned how to format them, you know, what you should include.” This student did not mention defining purpose or considering audience as part of these genres (p. 309).

So, although Sam mostly focused on the format and organization of the particular genres that he intentionally transferred, he is unique in that he considered audience to be incredibly important as well, as he notes the purpose for each document was to inform the audience of some kind of change or to make some kind of request. Sam very clearly had prepared to write documents for his business’s audience, and knew and understood that audience very well. This makes his instance of high road transfer even more impressive, as he was able to not only transfer specific genres and formats, he also transferred rhetorical strategies like careful organization and audience analysis. Sam was what Nowacek (2011) would call an “agent of integration.” She notes that students can become “agents of integration” when they are “actively working to perceive as well as to convey effectively to others connections between previously distinct contexts” (p. 38). Sam was able to intentionally transfer learning effectively from my business communication class to his new business, and he was able to clearly explain that connection in his workplace screencast. Sam had a positive outcome from this integrative experience, as he used this knowledge when starting his own business. It is important to note that Sam successfully
was an agent who was intentionally integrating learning for his own purposes. Nowacek (2011) notes that she uses the word “agency” because it emphasizes a student’s ability to act and make change in the world; it also directs our attention to the social contexts in which agents operate and the standards by which they are judged…In this way the language of agents helpfully reminds us of a student’s ability to make a change, as well as the constraints that agents of integration are operating within or against (p. 39).

Sam was an agent of his own integration experience, as he was able to make clear connections from one activity system to the next, and to make a change in his business by doing so.

I urge researchers and instructors to note: the importance of motivation as a factor to promote transfer of learning should not be underestimated. Sam was an excellent example of the significance of extremely high motivation. Sam wanted this new business to be a success, and he knew he had many resources available to him on campus. So, he took advantage of those resources, and intentionally transferred as much learning as he possibly could to his new community. Many researchers (Bergmann and Zepernick, 2007; Dias et al, 1999; Freedman, Adam, and Smart, 1994) have argued that the classroom cannot really prepare students for the workplace, as all learning is situated; however, this particular case study shows that it is possible under the right circumstances. This may impact on how we interact with and explain strategies to our students in the business communication classroom (I discuss this further in the Discussion chapter).
This chapter analyzes the factors that are involved with participants’ abilities to successfully transfer between the two contexts. First, this chapter will discuss the third research question, and then will discuss each factor, and how each one seemed to influence the participants’ experiences in various ways. The significance of these findings is also discussed.

3. Which factors within the various activity systems influence students’ abilities to effectively transfer learning/rhetorical strategies from the business communication classroom to the workplace?

From this study, I have found that there are many factors that may influence how effectively a participant will be able to transfer learning from the business communication classroom to the workplace. As mentioned in the previous four chapters, there were many factors that may have affected participants abilities to effect transfer from the business classroom. For Sally and Beyoncé, audience analysis development was an important part of their classroom writing. For Annie, working directly with an audience who she knew helped her to develop her audience analysis skills. And for Sam, motivation was an important factor that helped him to directly transfer learning from the business communication classroom to the workplace.

However, in this chapter, I would like to discuss the three factors that seemed to influence my participants’ abilities to transfer learning to their new workplaces and seemed to influence how conducive the surrounding environment was to transfer. First,
participants must have an understanding of how their new communities work together. Second, the participants’ identity also greatly impacts how well they will be able to transfer learning to new situations, as they need to identify with their new communities to participate well with them. Third, I’ve also found that even if participants have strong rhetorical skills, if they do not have increasingly fuller participation in their new communities of practice, they will not be able to transfer well. This was illustrated by the success of Beyoncé’s, Sally’s, and Sam’s new workplace experiences, and the less than ideal experience of Annie. Although each participant experienced very different internship and job situations, the importance of each of these factors, compounded by the necessity of gradually more full participation remained the same. As Lave and Wenger (1991) note, learning is not the understanding of structure, but “in the increased access of learners to participating roles in expert performances” (p. 17).

Understanding of Communicative Purpose of Organization

This section analyzes how my participants understood the communicative purpose of the organization that they were working for. To be able to communicate and participate effectively within a new community of practice, participants must first understand how that organization actually works, and how each participant works towards the end goal. As Beaufort (2007) reminds us,

Besides dictating subject matter and genres for doing the work of the community, discourse communities also carry with them epistemological assumptions about what counts as truth, which in turn affects the types of arguments and proofs that are acceptable (p. 40).
Participants must be able to understand not only what types of genres they are using for communication, but also the underlying beliefs of the organization. This understanding will help them to be able to better communicate within their new communities of practice.

**Sally**

Sally had the opportunity to really be involved in her new organization and was shown how the whole thing was run. During her workplace screencast, she was able to take me through the whole website, and explain how it worked:

“This is the homepage, for (pseudonym), which is the company I work for. And here is that blog (clicking). And, as you can see I go in and it’s literally the exact same thing, with however the change was that I incorporated it. Now, I’m just going to show you the back end of the website. And how, this is called the content management system…” (from workplace screencast).

If we compare Sally and Annie, one of the interesting differences between them is that Annie received quite a bit of detailed feedback on her blog drafts, like, “This isn’t clear,” “The audience needs more information,” etc. However, Sally literally received one comment on her blog post from her editor: “It’s unclear what part was taken directly from the article, the…” Sally noted that this kind of brief feedback was pretty typical for most of her blog posts. Although I was only able to collect one sample of writing from each of these two participants, it seemed that Sally really understood how her community worked; more specifically, she understood how they spoke, and what her audience needed. She actually spent quite a bit of her screencast explaining to me who her
audience was, and what they needed; she explained that they lived in rural areas and didn’t always have access to the information that they needed:

But, basically, in short, it is a network for emergencies such as hurricanes or disasters where there’s a million people texting and calling and trying to get communication through. But, the people who need it, like the EMTs and EMS cannot necessarily get through, just out to their headquarters to be able to help people (workplace screencast).

From the way she spoke on her screencast, it was evident to me that she really cared about this quite a bit, and that she was concerned about her audience. She knew that this was important. She also linked the original article, and cited it, so her audience could go back to the original source. Sally, because of her deep knowledge of the community’s communication, was able to become more integrated into that position, and was able to move up within the company.

It seems that the main factor here is the peripheral participant’s understanding of the organization and communicative purposes and networks. Sally had the big picture, or at least a better understanding of the organization as a whole. Annie was very peripheral, and was (unfortunately) kept on the periphery. In the same way, Dias et al’s (1999) participant, Spiro, experienced this isolation as well, who commented:

In my experience at [agency], I was essentially isolated from the team. There was no team to go to. Even though I was a ‘member’ [gestures to indicate quotation marks] of the team, I was not officially interacting with any of the team… I think that to feel you’re on the side you need to be with colleagues and to exchange
clinical impressions, to learn from others… with their vast experience, I think, is essential (p. 218).

Annie mostly focused on her work with her supervisor (which was her job), but Sally actually could go into the system and change other people’s work, because they gave her that access. Sally’s company trusted her.

**Annie**

Another factor that may have influenced this is that Annie was outside of her field, since she was in marketing, and this was more in the field of scientific education and research. This was a new area for her, and she wasn’t very familiar with it when she started her internship. As she noted in her workplace screencast, “If people aren’t very descriptive, and I don’t understand something, I usually ask for more information after I’ve written the article.” This can be very frustrating, when asked to write about a topic that is hard to understand. It was apparent that Annie faced many boundaries when she was in her internship position, not only the boundary of subject matter, but also of peripherality and inclusion.

**Sam**

Sam was very involved with his new community, naturally, because he helped start it, as one of the co-founders. Therefore, it was easy for Sam to completely understand how his new company worked and communicated, because he was one of the people who helped plan it all out. Sam notes in his screencast:

For the most part, these headings, those were just decided on by myself, uh, got a little bit of feedback from my co-workers, but in this case, this is for a company that I started as a student, so there really wasn’t someone above me to say, ‘hey,
here’s our usual memo format, why don’t you just click and drop in the, copy and paste in the information, and then go?’ So, this truly was kind of a start from scratch, as far as our company goes.

His understanding of the new company was complete, because he was a part of it. He was actually able to help decide how the new company was going to all work together, and make those decisions with his two friends.

**Beyoncé**

Beyoncé was able to quickly learn how her new community communicated together, because she was in a position where everything (documentation) was routed. It was very helpful for a newcomer to be able to see how everyone communicated and how they phrased certain things. Because everything in the office was routed, not only could Beyoncé see how others’ wrote, she could also see how everyone could give feedback on those pieces of writing. As her supervisor noted, “Everything gets routed around the office.” It was a very helpful learning experience, and immersed her in the office environment. She was able to really understand the office from a legitimate peripheral participant’s understanding, as noted in the foreword of Lave and Wenger’s (1991) book, “This central concept denotes the particular node of engagement of a learner who participates in the actual practice of an expert, but only to a limited responsibility for the ultimate product as a whole” (p. 14).

There is ample evidence that Sally, Sam, and Beyoncé were more involved within their new community/activity systems. As Russell (1997) notes in his work with Activity Theory:
as an individual appropriates (learns to use) the ways with words of others, they may (or may not) also appropriate the object/motive, and subjectivity (identity) of the collective, of a new activity system. The process of learning (to write) new genres is a part of a process of expanding one’s involvements with activity systems (p. 516).

Because Sally sought out other ways to involve herself in the professional community she wanted to be a part of, it seemed to help her to write in these professional ways.

So, what may have caused this disparity? It is possible that several people are equally motivated and in an internship, some are encouraged to participate more and more within that community, and one is not. Bakeslee (2004) notes that research on genres “suggests that individuals must be immersed in a community, interact with the members and artifacts of the community, participate in and adapt to the social actions of the community, and appropriate the routinized tools-in-use of the community” (p. 170). This immersion within the new community was so beneficial for Sam, Sally, and Beyoncé, as they really understood how it all worked together. Annie’s experience at her internship was less immersive than that of her peers, and she was kept mostly on the periphery of the organization for the duration of her internship. While this was certainly no fault of her own, Annie had to adapt to her new community, but faced the boundary of only being able to work at the periphery of that community. This lack of immersion may also have caused limitations when it came to Annie’s identity, in a way that did not affect her fellow participants.
Various Identities of Participants

To better understand the relationship between transfer and my participants’ developing identities, it is important to identify possible identities that they experienced during this study. Here I use Nowacek’s (2011) explanation of identity as “an individual’s understanding of his or her role, capacities, affiliations, and worth” (p. 24). Lave and Wenger (1991) remind us of the importance of identity,

> Activities, tasks, function, and understandings do not exist in isolation; they are part of broader systems of relations in which they have meaning. These systems of relations arise out of and are reproduced and developed within social communities, which are in part systems of relations among persons. The person is defined but as well as defines these relations. Learning thus implies becoming a different person with respect to the possibilities enabled by these systems of relations. To ignore this aspect of learning is to overlook the fact that learning involves the constructions of identities (emphasis mine) (p. 53).

My participants first identified externally as students, then as consultants, then as interns/professionals. When my participants were students, they were all full participants in my class. At the end of the semester, they worked as consultants. Typically they were full participants within their groups, working for their clients. After graduation, they each had to make that transition from student to professional in their fields. Each participant, naturally, had a different inner identity (or perception of self) that developed during their new job/internship experience. While I did not want to prep my students to think about
their identities when they were creating their screencasts for me, inner identity is something that certainly came through in the way they talked about their work and jobs.

In their article, “Creating a Writer's Identity on the Boundaries of Two Communities of Practice,” by Ketter and Hunter (2002), the authors noted:

Of course, Erin's story of negotiating the transition between writing for academia and writing for work is unique. But her experience suggests one way in which students might learn about writing in different communities. Erin's consciousness of her identity as a writer is heightened by her work on the boundaries of two contrasting communities of practice as she thinks about and comes to understand the constraints and freedoms afforded by each community. Her participation in the two communities of practice enhances her understanding of writing as a complex interaction between the writer's identity and social cultural practices of the community. As do Dias et. al (1999), we see that the ways of learning about writing and the purposes of writing activity in academic and workplace communities of practice can differ, but we learn through this study that Erin benefits more from her participation in each because of her participation in both (published online, no page #).

This article focused on the understanding of their participant’s inner identity and how it is connected to her writing in her two communities of practice. While my participants did not take internships while they were also taking my class, this chapter focuses on the differences of writing within both communities. The authors found, as I have also noted, that internships give our students the opportunity to start becoming professionals in their
fields to understand how new communities of practice actually communicate. Each of my 4 participants did take at least one internship while they were undergraduates. Each participant was able to gain real writing experiences in their new communities of practice, and the opportunity for their identities to slowly shift.

**Sam**

Sam had the identity of an entrepreneur, which became apparent from his documents. Lave and Wenger (1991) note: “Legitimate peripheral participation refers both to the development of knowledgably skilled identities in practice and to the reproduction and transformation of communities of practice” (p. 55). This seems to be directly related to Sam and his experience. His identity as an undergraduate was that of student working towards becoming an entrepreneur. Even in the final project, Sam worked individually and created a business plan for an opportunity he found (his proposal for a street food stand- pizza cones). Not only did he not work with an outside client, he found an opportunity that he could possibly take part in. He was very focused and was constantly building towards that goal of starting his own business with his friends. He and his friends joined the Entrepreneur Club on campus to help prepare themselves to start their own business. Later, we can see how that skilled identity transformed an idea into a new business. As he said in his workplace screencast:

> One thing you don’t see in here, because I took it all out, but normally this is on company letter head, so there’s contact information here, a logo, a logo here, and then, at the very end, it would list the three account managers, and our respective contact information, for all of our employers, uh, all of our customers (workplace screencast).
It was evident how much this company meant to him and his three friends, and how he loved pointing out where his company logo would normally be, and that he was one of the “three account managers.” He had become that.

Lave and Wenger (1991) also argue that “Learning thus implies becoming a different person with respect to the possibilities enabled by these systems of relations” (p. 53). While this identity was certainly one that Sam was working towards, it does seem that he became a different person after he graduated and worked with his friends to build their new company. He became a business owner/entrepreneur. This identity was influenced by the motivation that Sam had to start his own company.

In their research on motivation and transfer, Pugh and Bergin (2006) write:

“Motivational factors can “influence initial learning in ways that either support or hinder transfer. Second, they can influence the initiation of transfer attempts. Third, they can influence persistence on transfer tasks” (p. 156). Pugh and Bergin (2006) also found that interest in learning and self-efficacy also were related positively to success in transfer. And finally, it is easier for a participant to achieve transfer successfully, if there is a clear end goal. Similarly, Belenky and Notes (2009) found that “engaging in invention activities before being shown the correct method is beneficial for transfer, regardless of initial goal orientation (mastery versus performance), while a mastery orientation must be present for students to transfer from a direct instruction activity” (p. 1163). Because Sam had a very specific end goal (to start the new company), he knew that understanding the key concepts from Business Communication were something that he would need and use.
Sam, out of all four of my participants was most highly motivated to succeed. He exhibited many of the factors in Pugh and Bergin’s (2006) study. Sam was the only participant who was working towards an unmistakable, specific goal—his own business, while the other participants were hoping to find jobs in each of their general areas after graduation. Sam knew he needed to prepare for this goal, and spent much of his time as an undergrad taking part in activities (like the Entrepreneur Club) and taking classes (like Business Communication) that he knew would help him achieve this goal. This goal also helped him stay focused and to work persistently. He also had his two friends, who were involved with him. He probably felt that he could not let them down, and that they were all in it together, which also kept him motivated. It is important to note that motivation is a factor that may help participants to transfer in a more high road fashion. Because Sam was so highly motivated to succeed with his new business, he very intentionally transferred learning, in this case, specific genres and formatting from my classroom to his new company. High road transfer depends on mindful abstraction from the context of learning or application and a deliberate search for connections (Perkins and Salomon, 1988).

Nowacek (2011) argues that we should take high road transfer a step further to denote if the student has had a positive outcome from this transfer. She proposes the term “agents of integration”—“integration to designate acts of transfer on this end of the spectrum” (p. 33). She noted that if students were able to transfer learning effectively, reflect upon the process, and end with a positive outcome, they would be agents of integration, as that meant they would be able to be fully integrated into their new communities. This seems to have been the case with Sam.
While Sam was exhibiting examples of high road transfer, it seems as though the examples from Sally, Beyoncé, and possibly Annie were that of low road transfer. They were able to develop and possibly learn skills that they then used in similar writing situations. It is more difficult to find specific examples of high road transfer, although it is very possible that the other participants were able to do so. It is also difficult to attribute those examples to the business communication course alone. It is more possible that it was a cumulative effect of various classes, work, and other activities that helped my participants transfer (similar to Brent’s 2012 findings). The other three participants’ identities here were impacted by their experiences.

Sally

When Sally was working as an intern at the communications company, she definitely thought of herself as an intern working her way up to a full-time position. Sally also took this course right before she graduated. Before she took this internship, she’d had another previous internship, and she was also involved in activities around campus. Sally was becoming a professional, and was ready to promote herself. She had learned from experience to be an intern and to see herself as a professional, not just a student in an internship. Sally was the Marketing coordinator for one of the robotics clubs on campus, and was involved with another club as well. Sally’s professional perception of herself was starting to turn into a marketing professional. I can distinctly see how she started to become a professional in her new community of practice, once she started to participate more and more within it, as she notes in her workplace screencast: “that’s pretty basic for all of the blogs that we have to do.” She was able to show that she was a
professional in that community from her workplace screencast, and the way that she spoke of her new community.

**Beyoncé**

Beyoncé also identified with being a student in the class, and seemed to enjoy working as a consultant for the final project. Beyoncé also seemed to fit in seamlessly into her internship with the career services office. She was working as a student intern, so her identity seemed to shift only slightly for that position, as she was required to write to other undergrads (her peers) for the blog. The internship allowed her to work in a real office (a new community for her), and to better understand how she functioned within it. After I asked her when she felt like a member of the office, she explained that she felt like a member of the community, “right away,” in the spring of that year. She was made to feel very welcome by the other members of the community. Dias et al (1999) found that their student social workers had a similar experience:

> It is within the workplace community’s public settings and in contacts with individuals from other professions in the hospital that the social work newcomers begin to feel like members of their own social work community and of the larger institutional community (p. 214).

The setting of Beyoncé’s internship office helped her to become an actual part of it. Not only was she included in the office work flow (and the routing of documentation), but her contact with the full-time members of the office helped her feel as though she belonged there.
Annie

Annie identified very well with being a student in the class and moving to a consultant position in the client project with the potter from her hometown. It helped that Annie was the member of the group who had suggested they work with the potter and who had the most experience working with him. Because of her familiarity with the potter and his needs, Annie knew how her group could really help him with their final project (see Annie’s chapter). However, when it came to her internship with the science organization, it was a little bit more difficult. It seemed as though Annie had not transitioned from her identity as a student—she was still a Marketing major. It is possible that she had not thought about how she might be a marketing major, but a professional in another field. Similarly, Dias et al (1999) found that

The attenuated authentic participation that characterizes initial workplace experiences includes certain essential components: real but limited tasks, timely assistance, a grasp of rhetorical purposes, and a big picture or overview of the community. In addition, such participation, based as it is in the workplace rather than in the university, must offer the newcomer a sense of membership or belonging and the opportunity to play multiple roles in a variety of workplace relationships. When all these factors are in place, the newcomer is drawn toward mature practice (p. 211).

All of these factors are important for new members to gradually become full members of their new community. Barnett (2012) notes that there is an “expectation-reality gap” between what new employees and employers expect in the workplace (p. 272). Part of the problem may have been that Annie simply had not had enough time to acclimate to this
new community of practice. While it is incredibly important for many students to experience some kind of internship during their college career, three-month internships can be problematic. Anson and Forsberg (1990), in their article on interns, noted that the interns they studied went through a cycle with various phases:

1. **Expectation** - a social construct of him or herself writing in that setting (often idealized)
2. **Disorientation** - frustration and often confusion
3. **Transition and Resolution** - establish a role and form new knowledge for adaptation

So, if we look at Annie’s work to analyze where she was in this cycle, it seems as though she was in the second stage, but had not quite reached the third stage. Annie noted that she learned how to write the news article for her internship by “trial and error,” as well as by looking at other examples that were available to her. Annie was also aware of who the audience for this document was, but because the audience was such a wide and varied audience with various expectations, Annie had a difficult time expressing and organizing all of the information that those audiences needed.

However, Lave and Wenger (1991) do note that this idea of a participant on the periphery can be positive. In fact, they note, “peripherality, when it is enabled, suggests an opening, a way of gaining access to sources for understanding through growing involvement” (p. 37). There is always the possibility that a participant can be or will be further integrated into the community of practice.

This issue with location and working on the periphery leads directly to the final issue that Annie faced: Annie did not seem to identify with her internship organization. We know that communication is socially mediated. Because Annie was an intern, she was in a temporary position in the summer, and was not completely involved/immersed in the work that went on within the organization. As Lave and Wenger (1991) note,
“Thus, identity, knowing, and social membership entail one another” (p. 53). In terms of Legitimate Peripheral Participation, she was barely at the periphery. Typically, organizations that are located on campus in the summer are not very busy. Part of the problem was that she wasn’t fully integrated into the organization because she was somewhat isolated and there weren’t actually very many people to interact and communicate with, other than her direct supervisor.

Also, Annie mentioned that often she had to wait for people to respond to her emails, which can be an even longer wait in the summer. If email was the typical way that she heard from her SMEs, then it is no wonder that she did not have a full understanding of how the organization works and communicates, because she was only privy to part of it. Lave and Wenger (1991) note, “Participation is always based on situated negotiation and renegotiation of meaning in the world” (p. 51). So, if Annie had very little interaction with others at the organization, of course her participation could only be very limited. She needed more time and more participation, which could have possibly helped her get to Anson and Forsberg’s (1990) Stage 3 a little faster.

Annie’s experience was similar to that of one of Brent’s (2012) participants. His participant’s desk was not placed in a physical location that was conducive to acclimating to her new community of practice:

Similarly, Irene’s physical placement appeared to hamper her role as legitimate peripheral participant. Having little in common professionally with the people she sat next to, she did not have professional small talk to form a natural bridge to enter conversations. She was also cut off from “observing others and being observed” in the organizational milieu in which her work was most closely
situated, and therefore, despite the best intentions of the other managerial staff, she had little opportunity to tap into this important resource for learning (p. 574). This location issue seemed to impede the participation and integration of Annie into the science organization’s community, as she was somewhat isolated. If this issue impeded Annie from becoming a full member in the organization, then it is also possible that it also impeded her from identifying with that organization before her internship was through.

I am hopeful that Annie reached the third stage (transition and resolution) by the time she left her internship, as she was responding well to her supervisor’s feedback. I do think she was getting close, because she seemed to have a good rapport with her supervisor and definitely wanted to improve in her writing, which is evidenced by her responses when she and her supervisor were discussing her work in the recording. After all, we are reminded, “Language is a part of practice, and it is in practice that people learn” (Lave and Wenger, 1991, p. 85).

Although I can also see evidence of Sally’s and Beyoncé’s identities changing throughout the project, Sam’s change was the most drastic as he went from student to business owner. His process of becoming was more direct and happened rather quickly. It seems as though my participants were better able to transfer learning well to their new contexts when they felt as though they were a part of that new community. Sam identified with his new company, Beyoncé felt like she belonged in her new office, and Sally identified with her new internship company. These shifts in identity helped those three participants transfer learning effectively in their new communities. Dias et al (1999) noted a similar finding with identity in their work, as they found, “When a newcomer
participation results in a contribution – a meaningful contribution, one that affects and changes the community – newcomers experience a sense of belonging, a sense of membership” (p. 212). This identity, or sense of belonging, is also directly tied to participation within the new community.

**Legitimate Peripheral Participation and Full Participation**

Participation within a new community of practice is incredibly important, because participation is the process by which they become a part of the community: “Participation in these ‘structuring structures’ initiates newcomers into the collective, into its ways of knowing, learning, and doing” (Lave and Wenger, 1991, p. 119). The goal of legitimate peripheral participation is for participants to gradually move into more and more full participation over time. This entails many things, according to Lave and Wenger (1991): “A person’s intentions to learn are engaged and the meaning of learning is configured through the process of becoming a full participant in a sociocultural practice. This social process includes, indeed it subsumes, the learning of knowledgeable skills” (p. 29). The authors go on to note that “Full participation is intended to do justice to the diversity of relations involved in varying forms of community membership” (Lave and Wenger, 1991, p. 37). Each of the participants’ participations in their new jobs/internships were very different, even though the internships were very similar in terms of their job duties. Each participants’ experiences (participations) are described in more detail below.

**Sam**

Sam was involved in other activities to help prepare him and his friends for the creation of their new company. He mentioned to me that he had also joined the
entrepreneur club on campus. It seemed to help him better understand what it meant to create and plan a new company, or what goes into creating a new company. This outside kind of participation may help new employees prepare for their new jobs, and may be an important part of preparing students to identify with their new professional communities.

Sam completed the large project in my classroom as an entrepreneur- he didn’t actually work with a client, but instead thought of a new opportunity that he (or someone else) could actually do. His idea was something clever (pizza cones) that could be sold as street food (please see Sam’s chapter).

He also spent his time in his undergraduate program preparing to start a new business, and finding out as much as he could before he and his friends graduated. He also seemed to be building his new identity as an entrepreneur/business owner, by carefully taking classes that he knew would help him (e.g. Marketing, Business Communication, Entrepreneurship and Innovation, etc.).

In Sam’s new community (the new Ag communications company), he was able to fully participate in his new community, because he had helped to create it. It was relatively easy for him, because he and his friends had started it together. Sam fully participated within that community, as we can see from the samples that he shared with me- a memo and a letter for clients. He was a fully functioning member of that community, and clearly stated that he used the formatting skills that he had learned in my class to create these documents. As he noted in his workplace screencast:

For the most part, these headings, those were just decided on by myself, uh, got a little bit of feedback from my co-workers, but in this case, this is for a company that I started as a student, so there really wasn’t someone above me to say, “hey,
here’s our usual memo format, why don’t you just click and drop in the, copy and paste in the information, and then go?” So, this truly was kind of a start from scratch, as far as our company goes.

While I do not know how the three friends split up the workload between them, I can see evidence of Sam’s direct participation (especially when he introduced certain formats to his co-owners) within their new company. As the company grew, so did his participation. As Lave and Wenger (1991) note, “But it is important to note that the knowledge is dispersed not only in different people’s heads but also in ‘culturally organized settings,’ including the routines and habitual practices of the group” (p. 31). Sam and his friends, as the first and only participants of that activity system, were able to decide how the group participated and created new meaning in the way that they organized and constructed information for their new company. This is something that may have been continually in flux until the three of them fell into a routine, as “Participation is always based on situated negotiation and renegotiation of meaning in the world” (Lave and Wenger, 1991, p. 51).

**Sally**

Sally was slowly brought into her new community as a member who first participated on the periphery, and then more and more fully. Sally had the opportunity to participate in not only writing her blog posts based on articles, but also was taught how to publish them using the company’s CMS. Later, she was promoted to a full-time position within the company. Roozen (2008) states in his article, “Journalism, Poetry, Stand-Up Comedy, and Academic Literacy: Mapping the Interplay of Curricular and Extracurricular Literate Activities”: 
Arguing that the writer’s school tasks are profoundly shaped by an extensive network of non-school practices, artifacts, and activities, I contend that we need to situate the full range of basic writers’ literate engagements into our research and teaching (p. 5).

Sally was involved with her editor, co-workers, supervisor, IT, supervisor’s boss and had interaction with them. She was involved with them, even though she worked from a distance. She was shown how their whole CMS system worked, and was also given some freedom to just do her job. She was encouraged to participate more and more fully in that community. She, as Lave and Wenger (1991) found, “As individual newcomers enter the workplace and participate in a particular community’s genres, they adopt its ideology and join the struggle that is played out through rhetorical practice” (p. 117).

There are many other things that students have taken part in (participations) that can influence their writing/communication. For example, Sally had also been a member of various other clubs, and had also taken an internship position with one of the robotics clubs on campus, as Marketing Coordinator. Sally had a much better internship experience than Annie did, and it may be that part of that was because of the wide array of activities that Sally had participated within. As Lave and Wenger (1991) remind us, “Legitimate peripheral participation refers both to the development of knowledgably skilled identities in practice and to the reproduction and transformation of communities of practice” (p. 55). In her new internship, Sally was also completely immersed and encouraged to participate within that new community. She not only understood how the organization worked, she was brought in as a very real member of that community, and
then brought in to be a full-time member of that community. She had worked in similar positions to build her skilled identity as a marketing coordinator.

Annie

Annie had a very different internship participation experience. She only had contact with three different groups (her supervisor, the SMEs, and she wrote for the outside audience). It also seemed like she received teacher-oriented feedback, instead of professional feedback. I noticed a similarity here to one of Winsor’s (2004) participants (Jason):

Jason evidently anticipated an audience that would evaluate his text based upon its correctness. That is, he saw a writer/audience relationship that echoed a common student/teacher relationship. Partly this was because Mark was to some degree functioning like his teacher. But partly it was also because until this point he had probably seldom or never written for anyone who wasn’t a teacher. His entire experience of writing fit into that mode (p. 25).

In Winsor’s (2004) research, she found that her four engineer participants “learned to write like engineers at work largely by trying to function within the engineering community” (p. 19) in their new internships. Perhaps Annie didn’t get a chance to fully participate into the community because she wasn’t encouraged to fully participate within it. She only wrote from the periphery, and was only ever a legitimate peripheral participant. As William F. Hanks noted in the forward to Lave and Wenger’s (1991) book Situated Learning, “Quite simply, if learning if about increased access to performance, then the way to maximize learning is to perform, not to talk about it” (p. 22). Annie
needed the opportunity to participate more and more fully in her new community of practice, but was not given it.

Being kept on the periphery seemed to be a large problem in that internship. In their chapter regarding apprentices, Lave and Wenger (1991) mentioned,

The physical layout of a work setting is an important dimension of learning, since apprentices get a great deal from observing others and being observed. Some meat departments were laid out so that apprentices working at the wrapping machine could not watch journeymen cut and saw meat (p. 78).

This issue of physical location and not being able to interact with the community was difficult for the apprentice butchers, because they couldn’t see what others in the organization were doing and how they were doing it. They were somewhat kept to themselves. Annie was also kept on the periphery of the organization. Her desk was at the edge of the organization and she didn’t seem to be as integrated into the organization as she could have been. The lack of more and more full participation in her new community was the main difference between Annie’s and the others’ internship and job experiences, and this seemed to impact her negatively.

**Beyoncé**

Beyoncé seemed to move well from the context of the business communication classroom over to her internship. She used rhetorical strategies well, and seemed to bring some of that rhetorical knowledge with her to her new internship. She seemed to focus on her audience very well when she was fully integrated and encouraged to full participate within the community. We can see evidence of excellent transfer when Beyoncé was
using her specific style of writing, and evidence of learning when her identity had changed to become part of the new community. Because of the way the internship was set up, Beyoncé was completely immersed in her new community. Her supervisor described to me that, “everything gets routed around the office. So everyone sees everything.” This openness in the office encouraged not only full participation from its members, but also full integration. Members were able to participate in their own capacity, but then were also involved in the feedback process, as each document made its way around the office. Beyoncé was able to see everyone’s feedback on her own work, but she was also able to comment on others’ work as well. In this way, Beyoncé was brought into the midst of her new community of practice. As Lave and Wenger (1991) note:

> Viewing learning as legitimate peripheral participation means that learning is not merely a condition for membership, but it itself an evolving form of membership. We conceive of identities as long-term, living relations between persons and their place and participation in communities of practice (p. 53).

Beyoncé was encouraged to participate more and more fully within her new community of practice from the beginning. There were similarities between Beyoncé’s work in her internship in the career services office, and that of the Yucatan midwives in Lave and Wegner’s book. Beyoncé was in that internship for a year, and was immediately brought into the office as a member of the community. For the Yucatan midwives, Apprenticeship happens as a way of, and in the course of, daily life. It may not be recognized as a teaching effort at all…Girls in such families, without being identified as apprentice midwives, absorb the essence of midwifery practice as
well as specific knowledge about many procedures, simply in the process of growing up (p. 68).

While there are many differences between the various situations, what is key here is that Beyoncé was simply a part of that office community from the start. She was brought in and she was shown how the office works and how they all communicate together, especially in their written communications. Because the written communications are routed across the entire office, Beyoncé was privy to the work that the rest of the office was completing and was able to learn in the process of being there. She also learned how the office handled certain situations and what they did to address them.

**Significance**

Each of the factors that are presented here work together. A participant must have knowledge of their new community of practice before they become a part of it, and their legitimate peripheral participation and identity work together- identity has to be a part of participation. My findings here reflect Lave and Wenger’s findings. Lave and Wenger (1991) bring these themes together:

Viewing learning as LPP means that learning is not merely a condition for membership, but is itself an evolving form of membership. We conceive of identities as long-term living relations between persons and their place and participation in community of practice. Thus, identity, knowing, and social membership entail one another (p. 53).
All of these themes have to work together for transfer to be successfully achieved; they are inter-connected.

From this study, I have found that even if participants have strong rhetorical skills, if they are not able to understand how a community works, identify with it, and more and more fully participate in their new communities of practice, they will not be able to transfer well. This was illustrated by the success of Beyoncé’s, Sally’s, and Sam’s new workplace experiences, and the less than ideal experience of Annie, where she was kept on the periphery (in many ways) of her internship. Although each participant experienced very different internship and job situations, the importance of legitimate peripheral participation moving to more full participation remained the same. These three factors all seem to influence participants’ abilities to transfer. Although each person’s experience will be different (with varying degrees of understanding, identity, and participation), this study has shown that each of these factors are important for effective transfer.

While Smart and Brown (2002) found that students interns did not seem to transfer rhetorical knowledge directly from their school experiences to their new work experiences, they noted that their participants did seem to pick up some rhetorical practices from various places. This study found that one of the four participants was able to transfer rhetorical strategies from the business communication classroom to his new company, and his fellow participants were able to show a developmental trajectory throughout their time in the business communication classroom and develop that even further in their new internships. This is a significant finding that shows students can learn
and develop rhetorical strategies in the business communication classroom and use them effectively in other situations, or they can develop rhetorical skills even further.

This study shows similarities with Brent’s (2012) study, as it was not possible to attribute all of the possible instances of transfer to this one business communication course. This study does show that one of my students (Sam) learned these skills from this one business communication course, and clearly attributed them to it. My other three participants (Sally, Annie, and Beyoncé) showed evidence of a developmental trajectory of learning. Each participant had the opportunity to practice and develop certain skills in my classroom, and some of them were able to improve their writing (to be more clear and more focused for their audience) by the end of the semester, and then develop them even further in their new jobs/internships, as evidence by their supervisors’ positive feedback (Sally and Beyoncé). Annie was able to practice these rhetorical strategies in the business communication classroom, and improve during her time in my class, but because of the factors that she faced in her internship, she was not able to carry them through to that situation. For an organizational table of learning transfer and development for each participant, please see table below.

(Table 7: Types of learning transfer and development)

<table>
<thead>
<tr>
<th>Types</th>
<th>Sam (Ch. 6)</th>
<th>Sally (Ch. 3)</th>
<th>Beyoncé (Ch. 4)</th>
<th>Annie (Ch. 5)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Learned in 302 course</strong></td>
<td>Attributed specific genre formatting (memo) concise writing style</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Practice in 302 course</strong></td>
<td>Formatting specific genres, organization, clear writing style</td>
<td>Audience analysis, summary writing</td>
<td>Creative/professional writing style</td>
<td>Audience analysis</td>
</tr>
<tr>
<td>Development in 302 course</td>
<td>Straight forward writing style (throughout semester), clear and concise writing</td>
<td>Audience awareness/audience needs, and summary writing (very strong throughout)</td>
<td>Creativity, and professional writing style (for specific audience). Even stronger with final project and internship</td>
<td>Improvement during semester on audience needs</td>
</tr>
<tr>
<td>--------------------------</td>
<td>--------------------------------------------------------------------------------</td>
<td>--------------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------</td>
<td>-----------------------------------------------</td>
</tr>
<tr>
<td>Developed further to workplace</td>
<td>Clear and concise writing to audience (clients), as well as memo formatting and clear email organization</td>
<td>Writing to specific audience (blog posts), and concise summaries (receiving very little feedback from supervisor)</td>
<td>Audience-focused writing style in blog posts- (minimal feedback from co-workers)</td>
<td>Received extensive feedback from supervisor</td>
</tr>
</tbody>
</table>

This means that many students are able to either transfer or develop these specific writing strategies and formats (even in a small way) to their new writing activities, showing that the business communication course, while sometimes regarded by many as a service course, is influential on our students’ future writing. It is also influential in that it may be the course that progresses student rhetorical strategies to the next level, so they become even more ready for new writing situations in their new workplaces.

This study echoes what Dyke Ford (2004) found in her work with engineering students: she notes, “the participants in my study did transfer information learned from previous rhetorical instruction, whether that instruction was in a technical communication course or from an internship or co-op experience. They remembered rhetorical concepts from texts they have constructed in the past and they applied those concepts in new writing situations” (p. 309). It seems possible that all of my participants were able to develop their rhetorical writing strategies and learning even further during their practice in the course, as shown from their developmental trajectories of learning.
However, this study complicates the findings of Dias et al (1999), as I have found that students are able to transfer some learning and rhetorical strategies (some using high road and some more low road transfer) from the business communication classroom to the workplace, even though the two are, as the authors noted, “Worlds Apart.” We can see from the examples in Sam’s case study chapters, that some students are in fact able to transfer learning directly from the business communication classroom to the workplace.

This study showcases the importance of the three factors that are previously mentioned, and how they may affect participants’ abilities to transfer effectively across contexts. Clearly, there may be other factors that are involved in the transfer process, but these three are the factors that came out of this particular set of data. It is imperative for researchers and instructors to know and understand some of the factors that may help students transfer more effectively from the professional writing classroom to their future jobs. As we learn more about creating an environment that is conducive to transfer, we will be better able to prepare our students for future writing situations. We may be able to help our students understand these factors before they get to their new jobs or internships. If students have a better idea of how they can position themselves to be more effective at transfer (or as agents of integration, as Nowacek suggests, 2011), their new workplace experiences may be positive ones. While there are some workplace experiences and situations that interns and newcomers have no control over, we can at least give them a reasonable understanding of the factors that may be involved in the situation.

**Transfer**

This study also brings up the question that I brought up in the first chapter: what actually counts as transfer? When I first began this study, it seems that I may have had
too narrow a view of what transfer actually included. While one of my participants did clearly and intentionally use high road transfer from the business communication classroom to his new job, my other participants followed their own developmental trajectory. In the usual theories used to study transfer (like LPP and Activity Theory), a learning trajectory is not included and not part of the theory nomenclature. This study shows that we may need to re-think the way we study and define transfer, because it is different in every situation, and may be happening in various ways. I hope that my finding of developmental trajectories of learning may help researchers and instructors be more aware of the possibilities of transfer and give them more options to investigate it.

For example, if students are working on their own developmental trajectories of learning while they are taking various courses, this means that there is even more learning (or possible learning) that can be studied. We should be looking not only at the skills and strategies that students transfer directly from one context to the next, but we should also be aware of the skills that may be developing in our classrooms, that could develop into transfer in the near future. Instructors could encourage meta-awareness of the development of skills within their classrooms, and even ask students to reflect at the beginning of the semester, and at the end of the semester which skills that they felt they developed or improved upon during the semester. This may help students to continue on their developmental trajectories, and possibly use them in their next writing situation. This may show us instances of students’ development that may not have emerged in a typical transfer study.

Another option for researchers and instructors would be to observe the skills that students are using from classroom to classroom, to see how they are improving over time
and practice. It is also important to remember that each student learns at his/her own pace. Mapping the developmental trajectory of students’ learning may help to keep them on track, and it may help instructors encourage their students to continue working on and developing those skills even further.

It is also important for instructors and researchers to remember that transfer is often hard to notice at first glance. It was only through screencast reflections and careful coding of data from across the span of this project that instances of transfer and developmental trajectories became clear to me. These, and other methods of data collection should be used in future transfer studies to be able to uncover these possible instances of transfer and development. More studies in this area will possibly help instructors and researchers better understand how they can better prepare their students for the workplace.

Implications and recommendations for researchers and instructors are discussed in the following chapter, as well as conclusions and future research.
CHAPTER 8
CONCLUSIONS AND RECOMMENDATIONS

This study set out to explore which rhetorical strategies students were able to learn and develop in the classroom, and successfully transfer to the workplace, as well as which factors were involved in that process. After reading the literature in this area, I realized that very few studies followed students from the professional writing classroom to their new jobs or internships, and very few also studied business majors. Thus, my research questions that came out of the literature in this area are:

1. Through what school experiences did students report or appear they learned and developed the rhetorical strategies they used?
2. Through what nonacademic work experiences did students report or appear to learn and develop the rhetorical strategies they used?
3. Which factors within the various activity systems influence students’ abilities to effectively transfer learning/rhetorical strategies from the business communication classroom to the workplace?

This dissertation makes several contributions to the field of business and professional communication. A primary contribution is the way this study followed students longitudinally from the business communication classroom to their new workplaces, over the course of a year to a year and a half. I found that my participants were able to transfer some specific genres and rhetorical strategies from the business communication classroom to their new workplaces. I also found that there are three factors that impact how well participants are able to transfer. The significance of my findings is discussed further below.

This chapter will briefly answer the research questions provided above, compare my findings to those of other scholars in the field, provide implications and
recommendations for instructors and researchers, discuss the limitations of the study, and point to future research.

**Transfer of Learning**

There were some school experiences that my participants either learned and/or developed in my classroom, which they later used in their new jobs/internships (this is describe further below). The most obvious of these examples is from my participant, Sam, who was able to successfully use high road transfer.

**High road transfer**

This brings me to my first finding. Students are able to use high road transfer, from the business communication classroom to the workplace if they have very high levels of motivation. Sam was able to intentionally transfer learning from the business communication classroom to his new business, because he knew he would need that knowledge to start his business. Naturally, Sam wanted his new company to be a success, and so he intentionally used strategies that he had learned in my class to compose his new documents at his company. Sam and his two friends were very motivated, and wanted to make their new company a success.

This finding flatly contradicts what Dias et al (1999) found, in that it does show that the context of school can adequately prepare students for the workplace. Granted, Dias et al (1999) are not encouraging universities to get rid of professional writing courses, but instead to focus on “sheltered co-ops, work-study programs, and internships” (210) because learning is “profoundly situated” (220). However, even though the business communication classroom was certainly situated in the university, Sam was able to clearly and intentionally transfer learning and rhetorical strategies from the business
communication classroom to his new company. The main difference that I have seen between Sam and the other 3 participants is his very high level of motivation. And as he had a very positive outcome with his new company growing, he is what Nowacek (2011) would call an “agent of integration.”

**Rhetorical strategies**

My second finding is that I saw a developmental trajectory of several strategies in my course. In general, students seemed to come into my course with the basics of some rhetorical strategies, like audience analysis, but then used the writing opportunities in my class as a way to develop them even further. My students also had the opportunity to reflect upon their work, which may have helped them to better understand and think about how they could use those strategies beyond the classroom. It seems that there was a trajectory of learning here, and it seems logical to conclude that because this business communication course was one of the last classes they took before they graduated and went to their new jobs/internships, that they continued this trajectory there. Sally and Beyoncé ended up doing very well in their internships, and wrote well for their new audiences. This corroborates some of Brent’s (2012) findings, but also goes beyond it. Brent’s (2012) study found that students were able to draw on “a wide range of internalized rhetorical strategies learned from across their academic experience” (p. 558). Several of my own participants were able to use their skills of audience analysis in my classroom and then in their new workplaces (Beyoncé and Sally).

To discuss that audience analysis even further, Beyoncé was also able to successfully use another rhetorical strategy in her new job: an audience-specific writing style as she wrote her blog posts to her fellow undergraduate students. As evidenced by her work in my classroom, Beyoncé started with a general knowledge of how to write to
an audience, but that grew stronger when she worked on her final project (and then received a high grade for her work). In her internship, she developed this skill even further, as we can see from the minimal comments that she received on her draft from others in the office.

Sally was also able to successfully develop the ability to write a concise summary from a longer text (as well as to write to a specific audience), as I saw when I compared the original article to her written summary in her internship. This skill she developed most likely before she came to the business communication classroom (as we can see from her accurate work even at the beginning of the semester), but then developed it even further and used it often within her internship work as she wrote her summary blog posts. I can see that she wrote very well in her internship, as her supervisor only felt the need to give her one comment on her draft (which was pretty typical, Sally noted).

Annie worked on the rhetorical strategy of audience awareness throughout her time in the business communication classroom, and seemed to show improvement from her first assignment at the beginning of the semester to her final project at the end of the semester, where she wrote a very effective final report for her client, covering all of his needs well. However, that trajectory did not continue into her internship, as she faced several issues that seemed to prevent her from becoming a full member of that new community.

In his study, Brent’s (2012) participants also found that his participants alluded to the importance of audience analysis in the workplace writing that they had to complete. Audience analysis was an important part of the class, and came up in each assignment.
However, Brent (2012) found that his students seemed to develop that flexible genre knowledge simply from going to college classes in general and not from one specific course. This study echoes some of Brent’s (2012) findings, as my students showed that they also had flexible rhetorical skills that they could use in other contexts. Although, this study also shows that one participant, Sam, was able to transfer learning directly, while the other participants showed some modest, but specific learning that they had developed in my business communication classroom, that they were later able to use effectively in their internships (Beyoncé and Sally). Sam was the one participant who was able to transfer learning directly from my business communication classroom to his new company.

While there are certainly limitations in this study, there were some skills and genre knowledge that students were able to use in their work after college, with varying degrees of success. These rhetorical skills are key for students to learn and practice in the business communication classroom so they can successfully use them when faced with new writing situations in their new jobs, as one of my students was able to do (Sam). Each of the other three participants were able to show a developmental trajectory of learning throughout their writing during this study, that seems to have continued to their workplaces. This shows us that formal education can put students on a trajectory of learning in terms of these rhetorical strategies, like audience awareness and professional writing style.

Although this developmental trajectory of learning was an interesting development in this study, there are several factors that then influenced the ability of my
participants to either transfer directly to their new internships/jobs or to continue their trajectory of learning to their new internships/jobs. These factors are discussed below.

**Three Factors**

While working on this study, I found that there were three factors (although there may be many others) that affected how effectively my students were able to become a part of their new communities and possibly transfer learning effectively: an understanding of how the community works, an identification with the workplace community, and gradually more and more full participation. These three factors are even more important than I realized at the beginning of this study.

(Table 8: Factors involved in transfer)

<table>
<thead>
<tr>
<th>Factor</th>
<th>Importance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Understanding of community</td>
<td>Participants must be able to understand how their new community works and communicates to see the big picture of the community.</td>
</tr>
<tr>
<td>Self identity</td>
<td>Participants’ self-identities shift as they learn and become part of the new community.</td>
</tr>
<tr>
<td>Full participation</td>
<td>Participants must have the opportunity to participate more and more fully in their new community to become a part of it.</td>
</tr>
</tbody>
</table>

**Understanding of community**

Based upon my data, I agree with scholars like Lave and Wenger (1991) in LPP, who also found that participants need to have a very clear understanding of how their new community works and communicates together. Some of my participants, like Sally, Beyoncé, and Sam were all able to see how their new communities actually worked together. Beyoncé was not only shown how the office works, she was also integrated into the office in such a way that she was able to see what others in the office were writing.
Sally was also able to access all of the work that was stored on her company’s CMS.

Sam, naturally, had a very good understanding of how his company worked, as he was one of the founding members, and therefore helped to create it. This understanding of the big picture of their new community helped each of these three participants become more involved and better able to communicate (and then transfer) within it. This is not to say that the greater their understanding, the greater their ability to transfer. Rather, if participants have better understanding of their community as a whole, it will be easier for them to transfer learning in that situation.

Annie, as shown in her chapter, was not able to have a clear view of how her community of practice really worked, as she was kept on the periphery the entire time. We can see a very large difference between Annie’s experience here and the other participants’.

**Identity**

It is also important for new participants to feel as though they belong to that particular community, that they identify with it. When participants are included in the new community, they begin to feel as though they belong there. This is important for them to have any kind of positive transfer experience. Sam, Sally, and Beyoncé all had very positive experiences within their new communities, and felt as though they belonged there, which became clear from the way they each spoke about their new communities. They used inclusive words like “we,” “our company,” and “this is where our logo goes” to show how they felt like a part of these new communities. This inclusion helped them identify with the new communities and to feel comfortable working within them.

Annie, however, as evidenced from her words in her screencasts, did not identify with her internship community. Again, this may be related to her location on the
periphery, as she was kept to the side of the organization and didn’t seem to be very included, other than with her direct supervisor. It seems likely that this unintended exclusion environment prevented Annie from being able to transfer learning in a more effective way.

**Fuller participation**

This identity and understanding are intertwined with the third factor, which is more and more full participation within the community. Artemeva (2009) noted that participants begin to form their own professional identities as they feel themselves becoming a part of their new Community of Practice through participation in specific genres. The only way that a participant can really feel as though they are a part of the community and really understand how to communicate within it is by being brought in to the community and encouraged to participate more and more fully over time. This can be informal, frequent communication, but it should be interactive. Participants need to get to know their fellow co-workers. Naturally, this process takes time, and internship supervisors should take this into consideration when assigning work tasks for new intern employees.

Sam, Sally, and Beyoncé all were encouraged to participate within their new communities of practice. Sam, as one of the founders of the company, participated fully within this community from the beginning. His legitimate peripheral participation into the agriculture communications community began with his internships and time in the entrepreneur club, and then moved to full participation within that larger community as a business owner. Sally and Beyoncé were brought in to their internships and encouraged to participate more and more fully within it by their supervisors and co-workers.
This study confirms the findings of Lave and Wenger (1991) in their work on LPP, as they note that learning is “an evolving form of membership” (p. 53). If someone is isolated from the community, as Annie was in her internship, she simply cannot become a full member of it. This study also confirms what Dias et al (1999) found, that becoming a member of the new community is imperative to learning.

I want to be clear here: these three factors do not create transfer, nor do they indicate that transfer will automatically happen if all are present. What has come out of the data here is that without these three factors, it is much more difficult for participants to actually transfer effectively. These three factors help create an environment that is conducive to learning transfer.

This study also supports King Beach’s (2003) explanation of transfer. Instead of the term “transfer,” Beach (2003) preferred the term “consequential transition,” which he then explained: “A transition is consequential when it is consciously reflected on, struggled with, and shifts the individual’s sense of self or social position” (p. 42). Beach (2003) explains that those participants who were able to transfer effectively (or able to consequentially transition), and then reflected upon it, and seemed to struggle with it, and then experienced a shift in identity with their new workplace. We can see this occurring for Sam, Beyoncé, and Sally, who all reflected upon their work, explained their struggles, but then also became true members of those communities. Each of their transitions was meaningful, or consequential, because they changed as they went through it. It seemed as though Annie did not quite reach that stage of consequential transition.
Implications and Recommendations

Based upon the findings in this research study, I have some recommendations for researchers and instructors.

Researchers

While there are many ways to research instances of possible transfer, the methodological affordances of having students discuss their work in a screencast from the comfort of their own home, should not be underestimated. Students were able to scroll through their documents, and explain any struggles that they had writing them, or how they learned to write them. I have found that this method of data collection may make participants feel more comfortable than using text-based interviews, as they can record a screencast from almost anywhere they wish, and they do not need the interviewer to be present or hovering over their shoulder. Screencasts also afford the researcher the opportunity to gather two types of data simultaneously—both verbal and textual. This may allow for richer data collection, with more detail from participants. For example, in my participants’ screencasts, not only were they able to show me their documents, they were also able to discuss them with me on the recording (as though I were there). This allowed for a more conversational tone in their screencasts, and they all seemed to feel more comfortable sharing quite a bit of information with me. For example, I was able to learn something about Sally’s possible transfer from her screencast. As Sally said in her workplace screencast, “But, um, the content management systems that I’ve worked with, I’ve only ever worked with in internships, that’s not something that the school does a very good job of assigning a project where you work with a content management system. If I were a personal blogger, I would have experience with it, but I haven’t taken the time
to become one, so, umm, the point is, that’s not something the school has ever showed us.” Sally did have the opportunity to work with CMSs in the class and during her time at the University, but didn’t realize it. If she had not mentioned that on her screencast, I never would have known that was how she felt.

Although the fields of professional communication and composition have produced significant research on transfer of learning, and many studies have studied students learning in the business communication classroom, few studies have followed business majors specifically in a longitudinal study from a business writing classroom to the workplace. This study attempts to answer the call of organizations such as the Association for Business and Professional Communication, whose vision statement, according to their website is:

The Association for Business Communication (ABC) seeks to become the foremost authority in the field of business communication by promoting excellence in teaching, increasing knowledge within the discipline, enriching business communication classes to better prepare students, and improving the quality of communication in the workplace. Because we recognize the importance of globalization, the Association seeks to continue to expand its international membership as well as its international point of view… (ABC).

Similarly, the international accreditation organization, The Association to Advance Collegiate Schools of Business (AACSB), includes communication skills for business majors and MBAs as one of their important objectives for students to learn, and is a requirement for schools to become accredited. It is important to continue this valuable vein of research in business communication to better understand how specific student
populations learn and transfer learning across the contexts of school and work, and how to better help them address the boundaries between them.

It is important for researchers to be aware of the time and practice it takes for new members of a community to acclimate and become a part of the new community. New participants cannot become full members of a community if they are not integrated into it and have practice communicating within it. Identity formation does not happen quickly, but can be encouraged with time and practice. As I found in this study with Annie, these underlying factors that affected Annie’s participations help us better understand how Annie learned in each situation and how her identity shifted (or did not shift). We can see the movement of her participations, and how frustrating it must have been to move from a position of full participation in the business communication classroom community to a place of peripheral participation at her internship, without being able to move forward once she was there. Annie also faced the issue of not completely understanding how the rest of her organization worked, partially because there were many components and groups within the organization, but also because she was not really integrated into it. She also faced the issue of a short amount of time in her internship (3 months). These many boundaries were frustrating for her to face, and did not create an environment conducive to learning or developmental transfer.

While transfer can be very difficult to study, it is imperative for researchers to look at many different pieces of data to have a clear sample of participants’ work. In some cases (like Sally’s) it may even be that some participants do not realize that they have transferred learning from one context to the next, because it happened so automatically (low road transfer). Sally didn’t realize that she had used various CMSs
while at the university, and that probably helped her figure out the new CMS at her internship. This transfer may be happening unbeknownst to students, so it is important to look for possibilities in many different places and different documents and to allow participants to talk about their experiences. This will give them a chance to express where or when they learned something, making those connections for researchers.

It is important to note that being able to bring in Grounded Theory in this study allowed my to discover that what my participants were doing did not really fit in with the existing theory of LPP and Activity Theory. LPP and Activity Theory gave me the language to start to describe transfer, but did not accurately describe what was happening when they were not directly transferring learning from one activity system to the next or simply located within one situated learning community. Grounded Theory allowed me to see that what my participants were doing — a developmental trajectory of learning—was something different. This helps us to better understand where the limitations of these theories lie, and how we can better add to the conversation in that students are not always directly transferring from one context to the next, but they may be developing and progressing in our writing courses. This is something that we should investigate further.

**Instructors**

Artemeva (2009) warns us that learning professional genres does not happen in “a smooth, uninterrupted way, which starts in the communication classroom and continues throughout the engineering program” (p. 171). Learners acquire these skills in different experiences and situations, and this can help to build knowledge of workplace genres and practices.

Instructors should keep in mind that students need to understand the significance of what we are teaching them. To better help them understand when and how they might
use these rhetorical strategies and genres, I suggest bringing in specific written examples from their fields, so they can see and even research the documents being written in their fields. While this may be more difficult in a course that is not tailored to specific majors, one option would be to have students interview someone in their field, and then bring in documents from that profession and research them. These discipline-specific examples may help to encourage motivation in the business communication classroom, which will help with more deliberate transfer. My research shows that students who are highly motivated to learn and can see a need for the class material in their future will be more likely to be able to use high road transfer effectively.

As instructors we can introduce the idea of different kinds of communities to our students, and at least encourage them to start thinking about how each community is different and how their interaction in each of them is going to vary. They could start thinking about how the various communities that they are already a part of are different and similar. For example, how is their supply chain management club different or similar to the business writing classroom?

Another thing that instructors can do is promote student participation in communities outside of the university classroom. Winsor (2004) noted that her engineer student participants learned how to “write like engineers” by working within their new communities (p. 19). This ties into the focus of participation that Lave and Wenger (1991) bring up in their research, as well as in this study. If new members of the group are not allowed to really participate (more fully) within the community, they will not be able to learn how to write/communicate like everyone else in the community. New members should certainly start on the periphery, but then should be involved more and
more as time goes on. This kind of practice participation in other communities may help students prepare to adapt better in their future jobs, as they practice writing for a specific audience, as we can see from Sam’s work, as he moved from participation in the classroom, to several internships, and then to his own company. Sally similarly had opportunity to practice communicating in other communities, which may have helped her when she got to her new internship. I do want to note here that only Sam and Sally mentioned their extracurricular activities to me either in emails or their screencasts, but the other two participants did not mention any. That is not to say that Beyoncé and Annie did not take part in any, but simply that they did not mention them to me.

Spinuzzi (1996) also encourages students to “take part in an AN [Activity Network] outside of the English classroom, perhaps as apprentices, interns, or participants in a workplace” (p. 345). We should encourage students to start thinking of other activity systems/communities of practice, and how they might interact within them, so they can really start to prepare to be a part of a new community. It may help to bring up in a class discussion how different some classes are from one another. The following are some questions that can be used to facilitate a discussion:

- What kinds of discourse do they do in each of those classrooms?
- How does communication work in those classrooms?
- Are they mostly lecture/take notes, or are there class discussions?
- Is most of the work done online?
- How do groups (for group projects) communicate with each other?

Just as each class is different, each workplace and new community of practice is going to be different and have different rules and communication practices.
Instructors should not expect that they can completely prepare students for their new jobs. As Dias et al (1999) remind us, “In order to learn about professional writing, however, that introduction must be followed by more extensive and integrated workplace experiences, such as work-study programs, internships, on-the-job training, and other forms of transition between school and work” (p. 201). However, instructors should endeavor to bring up some of these issues in the business communication classroom, so students know what to expect when they get to their internships. Because motivation has been shown to be such a relevant issue in transfer, instructors should try to motivate students to understand the importance of the course. They can start a class discussion that may allow students to bring up any questions or concerns that they have regarding what to expect in a new internship. Instructors should also encourage their students to try to involve themselves as much as they can in their new internship communities, so students will have the opportunity to participate more and more fully and to better understand how the new community works. This may give students the opportunity to better understand the boundaries between the two activity systems (of school and work).

**Limitations**

This study was limited in that out of the 25 who initially signed up for the study, I had only 4 final participants. However, having 4 participants did allow me to focus more fully on each of their documents and experiences more closely, and to explain them with rich description. Also, because of the differences in their workplace experiences, I was able to show a wide variety of communication situations and analyze the factors that were involved in their abilities to transfer.
Another limitation was that 3 of my 4 participants were coincidentally marketing majors; although, one of those was a double major- marketing and accounting. It is possible that this may have affected the results of the study, although I have not seen evidence of that.

I was also only able to collect one to two documents from each participant during their workplace experiences (either new job or internship). It would have been helpful to collect several different kinds of written documents, collected from over a span of their time in their internships/jobs. However, for many of my participants, even collecting one document from their workplace with their supervisor’s consent was challenging. Each document had to also be scrubbed of any identifying characteristics, to keep the anonymity of the workplace, the supervisor, and the participant. Collecting more than one document from each participant would have taken more time than was feasible.

Another limitation was the lack of screencast from Beyoncé’s workplace writing. Even thought I was given a copy of Beyoncé’s writing, I was unable to collect a screencast recording of her comments on her workplace blog. Unfortunately, Beyoncé’s computer broke before she was able to send the completed screencast to me. In lieu of that screencast, however, I was able to have a sit down conversation with Beyoncé and her supervisor to discuss the blog post that she wrote.

Because this study was my dissertation project, I was the only person who coded the data. I did have some assistance from my adviser when coding Annie’s data in the beginning of the project, but then finished the rest of the coding on my own. In future research, I would ask for the assistance of coders who could go through the data alongside me. To make sure that I did not mis-represent my participants in any way and
for accuracy, I conducted member checks with each of my participants by email. After reading through the chapters that discussed each of them, my participants emailed me their responses. Each of my participants noted that they had no changes to make to the study, and felt that they were represented accurately.

This study spanned the work of my participants over 1 ½ - 2 years. Ideally, in a longer longitudinal study, I would like to see how my participants completed writing tasks after they had been with their new work communities after a year or two. For this project, I was limited to only a span of 1 ½ -2 years (the last couple of years in my Ph.D. program).

Also, it is important to note my own positionality as a teacher-researcher. There are many limitations that come from this type of research, especially because an instructor is in a position of power over her/his students. This power structure can be problematic as students may be trying to impress their instructor with their responses. Another problem with the teacher-researcher position is that it is natural for instructors to want to view their students’ work as very positive, or to want to portray their own class as highly influential to their students. These limitations can be alleviated by careful member checks, and by the use of diligent self-reflection during the analysis process.

The scope of this project was limited to the rhetorical strategies or kinds of learning that my participants may have learned only in my class. This did not take into account rhetorical writing strategies that they may have learned or developed in other courses at the university. I was also not able to collaborate with other faculty across campus, with whom I could have analyzed documents to see if rhetorical strategies that my participants used came from the classes.
Neither does this study take into account things that my participants may have learned in other situations, such as other internships or other job or club activity experiences. Due to the limited nature of this project, I was not able to analyze all other experiences that may have helped my participants to develop and learn these writing skills. And while excellent research has been conducted in this area, it is simply impossible to analyze and track down where each piece of learning came from. This is, however, a start.

**Future Research**

To develop a better understanding of how students transfer and develop learning and rhetorical strategies from one context to the next, future research is needed. Brent (2012) encourages researchers, by noting “we need more research to refine our understanding of what knowledge is most amenable to transformation, and how we might help students acquire and use it” (p. 565).

If I have the opportunity to revisit this research project, I would check in with my participants in a year, to see what kinds of work they are currently doing in their jobs, and the types of writing that they are completing. It would be helpful to have them look back on their old writing samples to see how they feel their writing has changed since they have been in their jobs, and to see the kinds of rhetorical strategies that they are using now that they have become accustomed to their new communities of practice.

Also, more research is needed to find out more about which kinds of learning are transferred in from different contexts. For example, what are students bringing with them from other experiences, like experiences working with campus clubs or organizations? To
read excellent research that has been done in this area in composition studies, please see Kevin Roozen’s work (2008, 2009, 2010).

In future work, collaborative work with other instructors across the university would be helpful to see if and how students are transferring learning from one class to another, and the kinds of writing strategies that students are using effectively from class to class. It would be helpful for both the students and instructors involved if we could share data between the classes we teach (perhaps, even by co-teaching) to see how students might be transferring strategies that they have learned in one class and using it in the next.

To address other student groups, it would be helpful to see how non-traditional students may be transferring learning from the business communication classroom to their jobs. I wonder if the levels of motivation would be higher, as students who have already had “real” jobs in the workplace, and are then going back to school for a variety of reasons. I hypothesize that because of their different situations, their motivation levels may be different than those of the traditional undergraduate.

**Conclusion**

Although the activity systems of school and work are, as Dias et al (1999) note succinctly “Worlds Apart,” I have found that the activity system of the classroom (business communication) can still prepare students for the activity system of the workplace. The evidence from Sam’s data shows that a student can intentionally transfer learning and rhetorical strategies from the context of the business communication classroom to his/her new job. This evidence of high road transfer is as exceptional as it is unique, as very few studies have found evidence of this kind of transfer. Sam’s high level
of motivation propelled him to transfer learning very intentionally. This confirms past studies in learning of transfer, and we can see evidence that rhetorical writing strategies can be taught in the business communication classroom, and successfully used in new writing situations. We can also see from the evidence presented in the previous chapters that in some cases, participants are using a developmental trajectory of learning to bring what they have learned with them to their new writing situations, and to develop that learning even further.

We can also see that the three factors -- understanding of community, identity, and full participation—are all inter-connected and necessary for successful transfer across contexts, and to create the kind of environment where this transfer is possible. I encourage internship supervisors to be aware of this, and take this into account when working with new interns. As Anson and Forsberg (1990) remind us, “becoming a successful writer is…a matter of developing strategies for social and intellectual adaptations to different professional communities” (p. 201). The impact of these factors becomes clear when three of the four participants have a positive transfer experience, and the one participant who faces the obstacle all of those issues, in what seems to be an insurmountable way, does not. It is possible for a participant who has strong rhetorical skills in the business communication classroom to face these three issues in the workplace, and be unable to truly become a part of that new community because of them. Similarly, Smart and Brown remind us that their interns did not simply move knowledge from one space to another, but were able to transform former knowledge and use it in a new situation (internship). This is significant for all instructors and all researchers who want to prepare students for the workplace.
Finally, I would like to reassure my fellow instructors to remain hopeful--professional and business writing courses are and continue to be eminently useful, and can and do make a difference to our students’ lives. We must encourage our students to be motivated to use what they have learned in our classrooms by proving to them that these skills are some that they will use in their future jobs. If we can motivate our students, we may be able to start to break down the boundaries that exist between the activity systems of school and work. I encourage instructors and researchers to continue this line of work, and to encourage communication between the activity systems of school and work, to create a pathway between these two activity systems.
REFERENCES


The project referenced above has been declared exempt from the requirements of the human subject protections regulations as described in 45 CFR 46.101(b) because it meets the following federal requirements for exemption:

- (2) Research involving the use of educational tests (cognitive, diagnostic, aptitude, achievement), survey or interview procedures with adults or observation of public behavior where
  - Information obtained is recorded in such a manner that human subjects cannot be identified directly or through identifiers linked to the subjects; or
  - Any disclosure of the human subjects’ responses outside the research could not reasonably place the subject at risk of criminal or civil liability or be damaging to their financial standing, employability, or reputation.

The determination of exemption means that:

- You do not need to submit an application for annual continuing review.

- You must carry out the research as described in the IRB application. Review by IRB staff is required prior to implementing modifications that may change the exempt status of the research. In general, review is required for any modifications to the research procedures (e.g., method of data collection, nature or scope of information to be collected, changes in confidentiality measures, etc.), modifications that result in the inclusion of participants from vulnerable populations, and/or any change that may increase the risk or discomfort to participants. Changes to key personnel must also be approved. The purpose of review is to determine if the project still meets the federal criteria for exemption.

Non-exempt research is subject to many regulatory requirements that must be addressed prior to implementation of the study. Conducting non-exempt research without IRB review and approval may constitute non-compliance with federal regulations and/or academic misconduct according to ISU policy.

Detailed information about requirements for submission of modifications can be found on the Exempt Study Modification Form. A Personnel Change Form may be submitted when the only modification involves changes in study staff. If it is determined that exemption is no longer warranted, then an Application for Approval of Research Involving Humans Form will need to be submitted and approved before proceeding with data collection.

Please note that you must submit all research involving human participants for review. Only the IRB or designees may make the determination of exemption, even if you conduct a study in the future that is exactly like this study.

Please be aware that approval from other entities may also be needed. For example, access to data from private records (e.g., student, medical, or employment records, etc.) that are protected by FERPA, HIPAA, or other confidentiality policies requires permission from the holders of those records. Similarly, for research conducted in institutions other than ISU (e.g., schools, other colleges or universities, medical facilities, companies, etc.), investigators must obtain permission from the institution(s) as required by their policies. An IRB determination of exemption in no way implies or guarantees that permission from these other entities will be granted.
English 302: Assignment #1- Messages Packet (100 pts)

Situation: You are a manager for the company TechCo which produces new technologies. One of your employees, John Jacobs, comes to you with some bad news – he has accidentally switched an order and sent

- a $1500 product to Mr. Smith, who ordered a $100 product, and sent
- a $100 product to Ms. Williams, who ordered the $1500 product.

Unfortunately, John did not realize his mistake until the product was shipped. It’s up to you to sort the mess out.

1. Write a negative adjustment/apology letter/email to Mr. Smith, who must send back the $1500 product that John shipped to him. (Ch. 10)
2. Write a positive adjustment/apology letter/email to Ms. Williams, who can keep the $100 product and will be shipped the $1500 product expedited. (Ch. 9)
3. Write a memo or email that gives the bad news and your decisions to your superior, whose name is Jane Adams. (Ch. 10)
4. Write a memo or email that gives the bad news and expedited shipping instructions to the Shipping Department manager, Fred Durst (a peer). (Ch. 10)

In order to reduce the number of mix-ups like this, you want a policy put into place which requires a manager’s signature on orders over $1000. Remember that often there is not one clear-cut answer, so you will need to provide multiple recommendations to your superior, detailing the pros and cons of each.

5. Write a special request memo or email to your superior (Jane Adams) suggesting the policy changes. (Ch. 9)

One Week Later

Success! Your policy has been accepted. Since the policy was your idea, your superior suggests that you should write the informative letter letting everyone in your building know about the new policy. You also want to make sure you send her (Jane Adams), a friendly thank-you letter.

6. Write a Thank-You letter to your superior. (P. 268-69)
7. Write a change-in-policy memo to the employees in your building. (Ch. 9)

These documents will be uploaded to the dropbox in Moodle. Please try to save all of the documents together so you don’t upload 7 separate files. Each specific document should follow the guidelines given in our textbook (specifically for content, style and design), should be clear and concise, and should be free of grammar, spelling, and punctuation errors.
#4 The Research Proposal (100 pts)
All topics must involve a real-life client who would be interested in the research you will do, and who would want to read your final report. Typical clients include local businesses, government agencies, and ISU departments or organizations. Many students choose ISU-related topics because it is the only community in which they have any connection or personal investment. But non-ISU topics can be extremely effective if you have personal ties to their organization, or their business or government agency is related to your field of study.

For any project to be successful, these are some of the key sections to include:

1. In your first paragraph, summarize in a sentence or two the topic and purposes of your report.
2. What problem/opportunity exists? Why does it need to be solved or explored?
3. Are you sure that a solution can be found in the time available.
4. Who in the organization would have the power to implement your recommendation?
5. List the questions and subquestions you will answer in your report, the topics or concepts you will explain, the aspects of the problem or opportunity you will discuss.
6. How will you get the answers to your questions? Whom will you interview or survey? What questions will you ask?
7. Do you have the knowledge and skills needed to conduct this study? Do you have adequate access?
8. For each activity, list both the total time you plan to spend on it and the date when you expect to finish it.
9. In your final section, indicate that you’d welcome any suggestions your instructor may have for improving the research plan.

The proposal is a formal internal document that requests final approval to carry out the project. Your audience for the proposal will be me – your instructor. You will have to present a detailed plan for investigating the problem, including a project schedule, and a thorough description of your planned research. This document should be between 2-3 pages, double-spaced. The example on Figure 17.2 is a very helpful model for you to follow, and can be tweaked according to your needs.

#5 The Progress Report (100 pts)
This will be a short, group oral presentation to the class (in a roundtable format). The presentations will be informal, and you will all speak for about 3-4 minutes, updating us on how the project is going.

Individually, you will also write a 1 page Progress Report (using memo format). This will be done in the lab. In your written Progress Report you will want to:

1. Summarize your progress in terms of your goals and your original schedule.
2. Under the heading, “Work Completed,” describe what you have already done.
3. Under the heading, “Work to Be Completed,” describe the work that remains.
4. Express your confidence in having the report ready by the due date.

#6 The Final Report (100 pts each for the report and the oral presentation)

Your final report presents the findings of your research (surveys, interviews with the client(s), outside research, etc.) to the client. Your goal in writing the report is to help your client make an informed decision about how to resolve the problem you originally identified. Note that your audience is not your instructor, but the client – this is why the assignment can also be referred to as an external report.

The report should include your analysis of the problem, a description of your research methods, your major findings, and the implications of those findings. It may also contain a recommendation about a course of action for the client to pursue. The four major sections of the typical workplace report include – Introduction, Methods, Results, and Discussion. The example in the book that you will find most helpful will be Figure 18.2. Please also see Figure 18.4 for ideas of how your report can vary from More Formal to Less Formal, depending upon your audience. You should tailor your report to your particular audience.

**Oral Presentation**- Your group will also give a detailed 10 minute presentation to the rest of the class, presenting your research project. Even though you are presenting this to your classmates, you should tailor your message to your actual client (as though they were actually in the classroom).
APPENDIX D

SALLY’S FIRST ASSIGNMENT

September 5, 2013
Mr. Smith
3939 Vine St.
Fairview, NE 39920

Dear Mr. Smith,
Your rightful product is on its way! It is my sincere apology regarding a mix up in orders. In our error, you have received our $1500 product instead of your correct order for our $100 product.
The $1500 product belongs to another customer. We ask that you send it back to us so that we may get it to its rightful owners. Please ship the product you received to:

TechCo
1423 West Lane
Des Moines, IA, 52404

We would like to extend our gratitude for your cooperation by crediting your account for the full $100, as well as the fees for shipping, once the $1500 product has arrived at TechCo. As I have mentioned previously, we have already shipped out your product and apologize for the delay and inconvenience of this error.
You are valued as our customer and we appreciate your assistance. Please contact us with questions or concerns at (515) 354-3939 between 9 am – 5 pm.

Sincerely,

Sally
Sally, Ordering Manager
TechCo
1423 West Lane
Des Moines, IA, 52404
(515) 354-3939
sally@techco.com
September 5, 2013
Ms. Williams
3928 Hayward Way
Raleigh, North Carolina 39201
Dear Ms. Williams,

It has come to our attention that a mix up in orders has occurred. In our error, you have received our $100 product when your order is for our $1500 product. We are currently expediting the rightful product to you.
We apologize for the delay and inconvenience of this error. We would like you to keep the $100 product to show our appreciation for your business.
You are valued as our customer and we appreciate your assistance. Please contact us with questions or concerns at (515) 354-3939 between 9 am – 5 pm.

Sincerely,

Sally
Sally, Ordering Manager
TechCo
1423 West Lane
Des Moines, IA, 52404
(515) 354-3939
sally@techco.com
To: Jane Adams  
Date: September 5, 2013  
From: Sally  
Subject: Correcting an Order Error  

Jane,

It has been brought to my attention that a mix up in orders has occurred.

- A $1500 product has been sent to Mr. Smith, who ordered a $100 product
- The $100 product was sent to Ms. Williams, who ordered the $1500 product

Since we have multiple of the same product in stock, I am having the correct products be shipped to their rightful owners immediately. I have also written a letter to Mr. Smith requesting the $1500 product be sent back to us. To show our appreciation for him as a customer I am reimbursing him the cost of his original product ($100) as well as the shipping cost for the $1500 product.

I have also written a letter to Ms. Williams. I have elected to show goodwill by letting her keep the $100 product due to her inconvenience and delay. Her $1500 product is about to be expedited.

I can hold any of these letters or products if you see a need, otherwise I would like to get them out to our customers as quickly as possible.

Sally

Sally, Ordering Manager  
TechCo  
1423 West Lane  
Des Moines, IA, 52404  
(515) 354-3939  
sally@techco.com
To: Fred Durst  
Date: September 5, 2013  
From: Sally  

Subject: Correcting an Order Error  

Fred,

A mix up in orders has occurred. To fix this issue we will need to send an expedited $1500 product to:

Ms. Williams  
3928 Hayward Way  
Raleigh, North Carolina 39201

The product is headed to your department now. Please notify me when we get her product sent out.

Thanks Fred,

Sally

Sally, Ordering Manager  
TechCo  
1423 West Lane  
Des Moines, IA, 52404  
(515) 354-3939  
sally@techco.com
(email)

To: Jane Adams
Date: September 5, 2013
From: Sally

Subject: Policy to Prevent Shipping Errors

Jane,

After today’s incident, I would like to recommend a few policy suggestions to prevent further costly errors.

First, I recommend a manager’s signature be required on orders over $1000. This will keep the pressure on the ordering department and the shipping department to ensure their work is accurate as well as give the orders another pair of eyes to check over them. Although it will take slightly more time to have managers come over to sign off on orders, it would be cheaper than refunding people whose products are not getting to them appropriately.

Second, we could incentivize our employees to check their work by rewarding a selected number of successful days without an error. For example, for every 100 days without an error, a $30 bonus would be added to their check. This would be a small cost compared to frustrated customers who are not receiving their correct order.

Finally, an annual performance review that would tie into a Christmas bonus would be my third suggestion for decreasing errors. This would inspire shippers to check their work and be thorough. Again, the added cost of checking our work would be worth the price compared to frustrated customers and inaccurate orders.

These suggestions have the opportunity to improve moral. With fewer mistakes made, people will be in better spirits. The options with bonuses will make people aspire to receive the rewards.

If there are any suggestions you’d like further explanation on, I would be happy to stop by your office. Do you see anything you would like to implement?

Sally

Sally, Ordering Manager
TechCo
1423 West Lane
Des Moines, IA, 52404
(515) 354-3939
sally@techco.com
Jane,

Thank you for approving my suggestion to have managers sign off on orders over $1000. I will perform analytics to ensure our new policy is creating the desired results. I look forward to writing the policy and sharing it with the ordering and shipping departments! If there is anything else I can help you with, I would be happy to come by and talk or offer suggestions.

Thank you, Jane!

Sally
Date: September 12, 2013
To: TechCo Ordering, TechCo Shipping
From: Sally
Subject: New Policy for Orders over $1000

In order to increase customer order accuracy, we will be instituting a new policy on orders over $1000.

**Actions for Ordering Department**

When an order over $1000 is processed, your manager will need to sign off on the order before it is sent out. Please call myself (Sally) or Sheryl Hardigan up on the radio and we will be happy to come sign off on your product.

**Actions for Managers**

Ordering manager will now be called over to evaluate orders over $1000. The managers will use the last four numbers under the barcode to record the package as successful and ready for shipping. Managers will record the package numbers on a new form created for this process. The form can be found in the manager office file stand labeled “$1000 Orders”. When the sheets get low please take one and make more copies. On Tuesday morning you will need to take time to enter in the $1000 orders in CYPORT.

**Notice for Shipping Department**

As we get this process streamlined, expect some delays in orders before they come to your department.

**Effective Date**

This policy will go in effect at the beginning of the first shift at 8:00 AM on Monday morning (9/16/13).

**Questions or Concerns**

Please contact myself (Sally) at (515) 354-3939, sally@techco.com, or Sheryl Hardigan at (515) 354-4994, shardigan@techco.com.
Date: September 12, 2013

To: John Meyers, Jane Adams, Sally Rae

From: Sally

Subject: Performance Review for John Meyers

John has been a lasting asset to our group. His honesty and timeliness has made him a valuable member of this team.

Strengths

John demonstrated honesty on September 5th when two orders of $100 and $1500 were mixed up. If he hadn’t been able to come tell me about the mishap, then we would have been dealing with two very frustrated customers. We were able to be proactive in this unfortunate situation because of his honesty and integrity. In addition, John has an accuracy rating of 95% for this quarter.

Areas for Improvement

In light of the recent situation on September 5th, he will need to take more care when packing orders. Additional seconds used are necessary for reexamining an order. He has brought to light an area that everyone can improve on to reduce ordering errors.

Overall Compatibility

I think John is a positive member of this team and a hard working individual. We get a lot done in this department because of his enthusiasm and helpfulness.
September 14, 2013

Ms. Carri Bradshaw  
Personnel Director  
Dvorak Electric, Inc.  
2938 Broadway  
Manhattan, NY 39920

Dear Ms. Bradshaw:

I would like to respond to your request for an evaluation of John Meyers. John was hired on May 20, 2009 as a packer for TechCo. He has been an effective worker in our ordering department with an accuracy rating of 95% for this quarter.

As a packer, John managed a safe and clean work station while packing out orders for our customers. He printed out labels and matched them with our products with 95% accuracy. Every week we have our packers create an ordering report to track their own progress and see how quickly and accurately they are preparing orders. During the sale months John works hard to keep our quality and quantity high when orders are increased. I only need to give him directions once and he accurately follows through for the team.

At TechCo, John utilizes our data management system CYPORT as well as Microsoft Office and Excel. John has never missed a weekly ordering report which is when he uses these applications. John is always prompt to work and punches in and out accurately.

John is a hardworking, highly motivated individual who I would recommend highly. Please call me if you need any further information at (515) 354-3939.

Sincerely,

Sally  
Sally, Ordering Manager  
TechCo  
1423 West Lane  
Des Moines, IA, 52404  
(515) 354-3939  
sally@techco.com
This is Sally, with Assignment #1. First we have our negative apology letter, to Mr. Smith, who received the $1,500 product, and we’ll need him to send it back. And to show our goodwill we’re going to credit his account for the full $100, as well as the, paying for the fees for shipping, but only once the $1500 product has been returned to TechCo. And a goodwill ending there at the bottom.

The second letter is to Ms. Williams, and we apologize for the inconvenience, and she is valued as our customer, and she gets to keep the $100 product.

And then we have an email to Jan Adams to correct the error, I let her know the different steps that I was taking to correct the error, but I also said, “I can hold any of these letters or products if you see a need, otherwise I would like to get them out to our customers as quickly as possible.” So, she has the ability to change the situation.

To Fred, I assumed he would get multiple requests like this, so I kept it as brief as possible, just saying that an error has occurred, and that an expedited product would need to go to this specific address, and that the product was headed there, asking him to notify me when the product was sent out, so I could the letters out.

To Jane, I sent another email, explaining three different policies that I came up and then feeling free to have her contact me at any point (at the bottom of the document).

Thank I thanked her in a written, hand written thank you letter, and then umm, explained how I would be contributing by looking forward to the, explaining the policy to the shipping and ordering department.

Then for the new policy order, I made it a list serv for the ordering and shipping departments as well as ordering managers, notice for shipping department, the effective policy date, as well as where to contact us for any questions.

Then the performance review for John, I tried to keep it light hearted. It’s always hard to have a mistake like this, but I know that positive improvement is better than disregarding him in a negative manner, so I brought the situation up, but still wrote some areas that he could improve on.

But, he still decided to leave, once again I kept it really light in this recommendation letter, so that he would still be able to get a job. He is a good employee, and it was just a mistake that could have happened to anyone, and we’d like to prevent that further.

Anything I would like to go back and correct in these letter is explaining to them (customers) that we’re making a policy to reduce the # of errors that occur to the two customers. That’s assignment #1, thank you!
APPENDIX F

SALLY’S INSTRUCTOR FEEDBACK ON ASSIGNMENT #1

Hi Sally, it’s Ms. Schieber here. I just wanted to quickly go through your Assignment #1 with you. Ok, so we are looking at #1 here, your letter to Mr. Smith. I like your contact info, and how you set up the formatting, as well. Let’s see, the only piece of information that I felt was missing was when should he ship this back to you by? If you don’t give him a date, it might take a long time for him to give it back, so try to give him a date when it should be back by. I think that would be really helpful. I really like how you set this up.

So, for #2, again really nice way that you set it up, but again, we don’t know when it will arrive. So, you are talking about “currently expediting” the product to her, but she doesn’t know when it will get there. Is it going to get there tomorrow? In a couple of days? Be as clear as you can. And I like how you offer the “we value you as a customer” and, nice and clear, great information.#3, really great detail, and it’s really clear and easy to understand. I really like how you explained it to Jane, it shows that you really took care of it.

For #4, talking to Fred Durst, I would just abbreviate North Carolina here to NC, that’s usually how we do it when we are mailing something. And then, I really like the tone: “Please notify me when we get this done…” so that’s really nice. And it’s a little right here, because you’re talking about “an expedited $1500 product” just be really clear which product exactly that is. It’s just a little bit unclear.

Ok, for #5, I think you have some good options, it’s just a little unclear which manager it is. You recommend “a manager’s signature,” which is great. Is it you, is it Jane, is it Fred, is it a completely different manager? We don’t know exactly who it is, so just be really clear, but I like how you give three different ideas for this. I think that’s fantastic, and you talk about each one.#6 is very polite and very friendly. I think she would appreciate hearing that.

#7, you have great details, I really like your headings, I think that’s great. And you give clear information. So you say, who they can call up, and how to get a hold of you, and how it will be taken care of. I like how you focused on that, that’s fantastic.#8, again, you have great headings, really nice information. And you start out with a nice little umbrella statement that kind of leads into it, that’s fantastic.

And then lastly, umm, I love this- Carri Bradshaw, very cleverly done. You did a great job. Honestly, there’s nothing I would change about this final letter, it looks great!
APPENDIX G
SALLY’S GROUP FINAL PROJECT

CampusTown Cash

Expansive Innovation for Midwestern U Dining

Prepared for
Senior Vice President for Business & Finance
Ames, IA 50014

Prepared by
Sally and group
In this report you will find a thoroughly detailed outline of a new form of payment to be included into MIDWESTERN U Dining called, CampusTown Cash. We have provided key information and have made recommendations to completely explain the details of this plan and the process to implement it.

An analysis of our findings and research has led us to conclude that the student body desires an expansion to MIDWESTERN U Dining. This expansion is desired in the form of an off campus dining payment option, ran through MIDWESTERN U Dining. Currently there are 15 total on campus dining options, many of which routinely sell the same food as the others. The student body craves new and different eating options, other than what is already provided.

Our main source of information has been Nancy Keller. We have met with her and discussed this idea and many more on the general topic of expanding MIDWESTERN U Dining.

We believe that this report will demonstrate a complete proposal for an idea that is not only desired by the majority of the student body, but also could provide profitable returns. If you would like to contact us for any further questions or comments on our recommendation please email us at aholtorf@iastate.edu. Thank your for reading our proposal and we look forward to your feedback.

Sincerely,
CampusTown Cash

Expansive Innovation for Midwestern U Dining

Executive Summary

To maintain stability and growth for MIDWESTERN U Dining, they should provide a service that will allow students to eat at off-campus dining locations. MIDWESTERN U Dining is currently not affiliated with the University and is required to financially sustain themselves. Although they have struggled every year, they have succeeded in making a profit. Our proposal will bring a guaranteed marginal profit to MIDWESTERN U Dining that will aid in the future stability of their business and provide students with a new desired option.

We are proposing a new form of payment that will be an option for students to purchase as a bundle with meal plans, or as a separate commodity. Called “CampusTown Cash”, however, it will not be given at a premium to students like “Dining Dollars”. Rather, students will purchase CampusTown Cash at a flat rate that can be used at both on and off-campus dining options. It essentially will be seen as a debit card ran through MIDWESTERN U Dining. Businesses that are accepting of this payment will pay a $0.05 tax on every dollar gained to MIDWESTERN U Dining. This will provide off campus businesses with a new market and customer base they otherwise would not have reached.

Our research indicates that the vast majority of MIDWESTERN U students strongly covet the option to eat off campus using a payment form of MIDWESTERN U Dining. After meeting with Director of Campus Dining Services, we have concluded that using any existing form of payment off campus is not financially feasible to provide to the students. The main reason this is not a realistic option is due to the requirement that MIDWESTERN U Dining places on any payment used exterior to MIDWESTERN U Dining, which is a tax of $0.17 on every dollar. Local businesses that surround MIDWESTERN U will not be able to afford that high of a tax which is the focal reason why an off campus payment option has not been successful in the past. The reason for MIDWESTERN U Dining charging that high of a tax is due to the premium that is given to students when purchasing on-campus dining payments. Our new form of payment will lower that tax number down to an estimated $0.05 on every dollar, while still maintaining a profit. This is a reasonable tax that we believe will entice the surrounding restaurants near campus.

CampusTown Cash provides a win-win situation for all parties involved. The student body receives a long desired off campus payment option, MIDWESTERN U Dining has a guaranteed increase in profit, and local businesses customer bases will grow.
Introduction

To ensure longevity and profits for MIDWESTERN U Dining, we recommend expanding their payment options to an alternative off-campus form. CampusTown Cash will bring MIDWESTERN U Dining a stable source of profit that will simultaneously meet the desired needs of the student body.

Purpose and Scope
There has been an ever-growing demand from the student body to increase campus-eating options. The specific options requested are those eating options off campus. Along with this desire from the students comes a similar desire from MIDWESTERN U Dining to draw in or retain more customers for dining option plans. Currently, less than half of the MIDWESTERN U student body uses MIDWESTERN U Dining payment options leaving the other half to purchase off-campus food. However, these off campus restaurants seem to continually struggle drawing in the MIDWESTERN U student body.

This report will dissect the positives and negatives for all three parties involved in the implementation of CampusTown Cash.

Assumptions
This recommendation has come from the assumption that the information we have received is in fact accurate and not out dated. It also comes from the assumption that MIDWESTERN U Dining possesses the necessary technology to add this form of payment to their existing options.

Methods
The information in our recommendation has come from online sources, primary interviews, and surveys. We have found several online articles discussing MIDWESTERN U Dining and their business practices. Our interview was with Nancy Keller, Director of Campus Dining Services, where she provided us with a plethora of statistical information relating to this topic. Our survey was conducted in five dining halls on campus asking students if off campus eating options is a desired commodity.

The remainder of this report will dissect the pros and cons of implementing CampusTown Cash for the three parties involved: MIDWESTERN U Dining, the MIDWESTERN U student body, and local Ames businesses.
MIDWESTERN U Dining

MIDWESTERN U Dining currently provides 15 different dining options to students. Ranging from buffet style cafeterias, convenience stores, sit down restaurants, a la carte cafeteria-style options, and two national chains in Panda Express and Subway. All of those on-campus options accept all forms of MIDWESTERN U payment. Even with millions of dollars coming into MIDWESTERN U Dining every year they struggle to simply break even. An expansion into their already existing programs with CampusTown Cash will lead to increased profits for MIDWESTERN U Dining.

Increasing Profits

CampusTown cash will be bought by students at a flat rate with no premium. $50 of CampusTown cash will cost the student $50, and so on with increasing values. The only work this will require on the part of MIDWESTERN U Dining will be the accounting process. There will be no physical product given on the MIDWESTERN U Dining behalf but rather just a service. Currently, there are roughly 10,000 of the 33,000 MIDWESTERN U student body on some form of MIDWESTERN U Dining payment. That means that 23,000 students at the University do not go through MIDWESTERN U Dining to purchase food.

We believe that CampusTown Cash will immediately gain in popularity and will not take away any of the 10,000 students that use MIDWESTERN U Dining. To those 10,000 students, this will be an accessory to their already existing program. This form of payment could draw in a small margin of the 23,000 other students that do not currently use MIDWESTERN U Dining. CampusTown cash will provide those students with this option hoping to engage the customer base that MIDWESTERN U Dining is currently not reaching.

We estimate that of the 10,000 students that currently use MIDWESTERN U Dining, roughly 15% would purchase some level of CampusTown Cash. Below is a breakdown of possible profits from implementing this program. On the X-axis is the possible purchased value of CampusTown Cash. On the Y-axis are ranging percentages of the 10,000 students that are currently using MIDWESTERN U Dining that would purchase CampusTown Cash. In the chart are the allocating profits that those values and percentages would be produced for MIDWESTERN U Dining.

<table>
<thead>
<tr>
<th>Table 1</th>
<th>Percentage of the 10,000 Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>Value</td>
<td>5%</td>
</tr>
<tr>
<td>$50.00</td>
<td>$1,250</td>
</tr>
<tr>
<td>$100.00</td>
<td>$2,500</td>
</tr>
<tr>
<td>$150.00</td>
<td>$3,750</td>
</tr>
<tr>
<td>$200.00</td>
<td>$5,000</td>
</tr>
</tbody>
</table>
The other 23,000 students will be more challenging to draw in. Increased marketing of CampusTown Cash would be a great way to get the word out and potentially increase the reach to those students.

The table below dissects the potential profits of CampusTown on the 23,000 students currently not using any form of MIDWESTERN U Dining. This table is set up in the same format as Table 1 above.

<table>
<thead>
<tr>
<th>Value</th>
<th>1%</th>
<th>3%</th>
<th>5%</th>
<th>7%</th>
</tr>
</thead>
<tbody>
<tr>
<td>$50.00</td>
<td>$575</td>
<td>$1,725</td>
<td>$2,875</td>
<td>$4,025</td>
</tr>
<tr>
<td>$100.00</td>
<td>$1,150</td>
<td>$3,450</td>
<td>$5,750</td>
<td>$8,050</td>
</tr>
<tr>
<td>$150.00</td>
<td>$1,725</td>
<td>$5,175</td>
<td>$8,625</td>
<td>$12,075</td>
</tr>
<tr>
<td>$200.00</td>
<td>$2,300</td>
<td>$6,900</td>
<td>$11,500</td>
<td>$16,100</td>
</tr>
</tbody>
</table>

Profits are inevitable with a program like CampusTown cash. The number of students who would participate is irrelevant because at no time does this operation cost MIDWESTERN U Dining any money.

These profits breakdowns do not account for any leftover unclaimed CampusTown Cash not used by students, and also anytime these dollars are spent on campus. A program like this could also decrease the premium Dining Dollar sales that would reflect in a more profitable return for MIDWESTERN U Dining.

**Implementation**
Starting up CampusTown cash will be an easy process to create that is similar to how Dining Dollars works. There will need to be a technology added onto MIDWESTERN U Dining that will allow for this new form to be accepted with their current UGryd payment method. Implementing such form shouldn’t be a difficult task from a technological standpoint.

Other work that will need to be done will be updating their website to add and explain CampusTown cash. This is a simple process but none the less still a step that will need to be taken. Another process of the implementation will be if MIDWESTERN U Dining chooses to market this new option to the student body. They would need to have their marketing team work on a few ads to run online and around campus to bring awareness to the student body.

**Cons for MIDWESTERN U Dining**
CampusTown cash possess a lot of pros for MIDWESTERN U Dining but does also bring up a few concerns. One main concern is if this small workload of running the process isn’t worth the marginal profit. If only a small percentage of students are using CampusTown cash and only making MIDWESTERN U Dining a few hundred dollars then the debate will arise if the program is worth it. A profit is always a good thing to
obtain but not when the process causes too much strain on the people running it. This will need to be evaluated as time goes on with the program.

Another primary concern comes from the restaurants that would now be affiliated with the University through MIDWESTERN U Dining. MIDWESTERN U Dining has a strict policy that doesn’t allow for any alcoholic sales on campus or through any MIDWESTERN U Dining programs. Allowing outside restaurants to use a form of MIDWESTERN U Dining runs the risk that CampusTown Cash could potentially be used to purchase alcohol. If a problem like this would occur however, the restaurant would lose all privileges to accept CampusTown Cash.

**MIDWESTERN U Student Body**

*Growth at Midwestern U*

Midwestern U has faced many challenges recently with record growth. The University has experienced increasing numbers in enrollment for the past seven consecutive years. This semester also marks five years of record enrollment. Midwestern U is currently working on solving over population problems.

In the fall of 2011, 2012, and 2013, Midwestern U was struggling to provide students with on-campus/university housing. Students suffered from this by getting undesired living spaces in dorm dens and delayed housing assignments. This resulted in building more residence halls as well as a slow increase in tuition and room and board.

MIDWESTERN U Dining Services is struggling to accommodate the rapid growth of incoming students as well. More students mean that there is a higher demand for food. Campus dining is processing a thousand more transactions a day compared to the same time last year. MIDWESTERN U Dining has temporarily fixed this problem by adding a café in Curtiss Hall. However, this will not be a long-term solution. Offering more places for students to eat will help eliminate the demand for more food, high traffic dining centers and seating will become available.

*Student Survey*

We conducted a survey to represent a voice for the student body. We visited multiple dining locations across campus including Clyde’s, the Memorial Union, Seasons, Conversations, and the Union Drive Community Center. We surveyed 200 students and these two questions.

1) Do you have Dining Dollars?
2) If you could, would you use them at Jeff’s Pizza, Fighting Burrito, or West Street Deli?

The amount of energy we received when asking two simple questions was incredible.

- 99% of the 200 said they would
- Two people said no
One said he would spend too much money. The other does not like the concept of campus money.

The responses we received were more than a “Yes”. It was accompanied by excited facial expressions, rising voice levels, and even some vulgarities. There is a desire from the student body to incorporate off campus businesses to accept university payment; however, until now this desire has been unrecognized by Midwestern U.

**Drawbacks**

Midwestern U has always stood for preparing students for after college and giving them the best learning experience possible. The college believes the best way for a student to achieve this is by staying on campus. By allowing students to purchase food off campus with their University ID can take away from this. It is impossible for Midwestern U to keep students on campus for four years without leaving. At some point or another, students need a break from school. Students may choose to step away from school, but they aren’t choosing to quit. Students will be utilizing a study break, but at the same time MIDWESTERN U will be earning a profit.

**Local Businesses**

**Customers**

Through the implementation of CampusTown Cash, local businesses are enabled to reach a customer base that has been lacking for years. This customer base, made up of MIDWESTERN U students, is currently eating on campus because for 10,000 of them, that is where their Dining Dollars are allowed. Offering MIDWESTERN U students the option of CampusTown Cash gives them the opportunity to go off campus and take a break from their normal eating routine. According to our research 98% of students value the idea of eating off campus and using MIDWESTERN U Dining forms of payment to do so. This means a need for other options to eat are pressing for the students and they are willing to become customers for local businesses.

According to Nancy Keller, Subway and Panda Express located in the Memorial Union have had great success and rising profits since accepting MIDWESTERN U forms of payment. Panda Express experienced a $2000 profit increase daily from students using Dining Dollars. She also reports that over 96% of Subway’s customers use Dining Dollars. Although CampusTown Cash will be separate from Dining Dollars, the principal still applies that external food vendors will be rewarded by accepting the CampusTown Cash system.

**Mission of MIDWESTERN U Dining**

MIDWESTERN U Dining provides a look at their mission and vision for the program under their “About Us” tab in the MIDWESTERN U Dining section of the Midwestern U University website. Under this critical component for any company, MIDWESTERN U Dining states “We work closely with student and faculty groups to ensure that we are
meeting and exceeding the needs of the Midwestern U community”. In order to fulfill the promise to “ensure [MIDWESTERN U Dining is] meeting and exceeding the needs of the Midwestern U community” we recommend instituting this plan of external payment incorporated in the meal plan options.

Taking a look at the vision of MIDWESTERN U Dining, we found that the following three aspects tie in perfectly with the goals of CampusTown Cash:

1. To provide meal plan flexibility to the campus community.
2. To develop, maintain and re-invest in modern, attractive and functional facilities that serve the evolving needs of the University community.
3. To earn satisfactory long-term profits so as to maintain the health of MIDWESTERN U Dining and assure the availability of the necessary capital for continuing growth.

Contrary to the belief that a local business would prosper in a college town, after discussion with the owner of West Street Deli, we discovered that Midwestern U is taking away from their business. When events come to MIDWESTERN U, that would be a great time for local businesses to see increased store traffic, but instead, MIDWESTERN U keeps them within their system and the local business suffer. The way to work around this problem is to incorporate local businesses with the university.

MIDWESTERN U Dining’s official mission is dedication “to providing a variety of quality and sustainable culinary experiences which enhance the educational and cultural aspects of Midwestern U University”. A great way to do this is to involve the businesses around MIDWESTERN U with our CampusTown Cash concept. Getting businesses involved adds to the culture of the MIDWESTERN U atmosphere and has proven to be a popular choice for a “sustainable culinary experience”.

Midwestern U University professors emphasize the desire to be involved in the community. The incorporation of CampusTown Cash would be a great way to accomplish this aspect of Midwestern U’s represented goals.

**Conclusion**

Midwestern U University and MIDWESTERN U Dining can fulfill their mission to incorporate the community and needs of the student body by implementing CampusTown Cash. This addition will provide a great opportunity of growth for the MIDWESTERN U and Ames communities. Through CampusTown Cash, MIDWESTERN U Dining will establish a stable source of profit that will simultaneously meet the needs of the student body.
Citations


Voss, B. (2013 September 25). *MIDWESTERN U Dining presents for GSB, hopes to expand retail*. Retrieved from
http://www.iowastatedaily.com/news/article_b4ad9b0c-2659-11e3-98a5-0019bb2963f4.html
APPENDIX H

SALLY'S FINAL REFLECTION

Date: December 18

To: Ms. Schieber

From: Sally

Subject: Final Reflection for English 302

In order to create an effective final paper, we analyzed our audience. This critical step allowed us to speak informatively and respectfully to our reader when proposing the new idea of CampusTown Cash. I will also reflect on this semester as a whole.

Who is Our Audience?
In our final proposal to enact CampusTown Cash we had one person who was our primary audience. The Senior Vice President of Business and Finance, would make the final decision on enabling CampusTown Cash to become a reality. Our other audiences included MIDWESTERN U Dining, Government of the Student Body (GSB), the student body and the restaurants in Ames. Students and restaurants in Ames want students to be able to use CampusTown Cash and the VP and MIDWESTERN U Dining want to create a system of making that possible. All of our audiences seek value out of what they do with their money.

Tailoring the Message
We recognized that Mr. Madden has a position of authority at Iowa State University; therefore we chose to be as formal as possible while writing. The VP and any other audience members needed to know the logistics of CampusTown Cash. This information needed to be presented coherently and logical in a format that he could easily understand. We chose to do an introduction, and then split the information up into three categories: Midwestern U Dining, Midwestern U Student Body, and Local Businesses. Although the introduction summed up the information, the three categories explained in detail the role each would play in enabling CampusTown Cash.

We used a formal tone as seen in our first paragraph of the introduction: “To ensure longevity and profits for Midwestern U Dining, we recommend expanding their payment options to an alternative off-campus form.

Limitations
As we were developing this document, we needed to express as many details as possible for Mr. Madden and other potential audiences. These details helped show we had done our research and been thorough in this investigation. We would not have told Mr.
Madden that some people do not like the system of Midwestern U Dining forms of payment as we found while doing our survey. We would leave this out because it was a minority compared to the thousands of students who do use Midwestern U Dining forms of payment.

**Final Thoughts on English 302**
This has been one of the best classes I have taken! I have appreciated the style and content and know I will continue to use these concepts like memos and email writing throughout my career! Thank you!
Hi, Ms. Schieber, this is Sally! I am going to walk you through writing a blog, sending it to my editor, receiving it from my editor, adjusting the comments and edits, and then posting it on my blog, and hopefully that will all be done in 15 minutes. So, what you can see if the blog I have written, “NetworkCo: Looking to the skies to cover hard to reach areas.” Umm, basically, our contract with NetworkCo, I was just told to write about NetworkCo. So, with that, I have a Google alert set up so that I get Gmail updates from anything that Google can pull that has the word “NetworkCo” in it. And I find articles, and then I quote the articles, and take who the information in the article is from, and then present our Connect Iowa audience with the NetworkCo information, that I find from this article. Because basically our contract allows Connect Iowa to share NetworkCo stuff with our people, because NetworkCo isn’t very big yet. And you can actually read this, second paragraph, you can find out what NetworkCo is, I won’t go into that. But, basically, in short, it is a network for emergencies such as hurricanes or disasters where there’s a million people texting and calling and trying to get communication through. But, the people who need it, like the EMTs and EMS cannot necessarily get through, just out to their headquarters to be able to help people.

So, what I do is I pull bits and pieces from the article, the important quotes, stuff that I don’t feel I can do justice to re-write or it’s just basically so basic that if I re-wrote it it would end up being the same thing, so I put it in quotes and I, really just add a couple of lines that I think help tie it all together (highlighting the 1st line in second paragraph). You know, “in the article”, just little stuff like that, and then Iowa is instructed to include, “In partnership with Statewide Inoperable Communications System Board,” every time I wrote one of these articles, because that’s who our partnership is with. And I always end it with, “View the full article” because this is not my article. I have my name on it simply because I took the time to write this up and, but I want to give 100% credit where it is due.

So, I write that up, I send it in an email to Wes, and I copy my boss, umm, one of our presenters for NetworkCo, and DPS, which stands for Department of Public Safety. I CC all of them, I write the subject line (NetworkCo blog for Editing), so that they know what’s going on. (Reading..) “Hi, Wes, Here is a NetworkCo blog post for next week. Thank you!” I give him a timeline for when I need it back. He is an insanely busy editor, with 10 states that have multiple things everyday that need to be edited, or multiple different people, so I give him a timeline always, of when I need it back. And, you can see, umm, this one apparently did not get back to me very quickly, I sent it December 12th, and I got it back December 16th. But, that wasn’t a problem for me, for needing it back. All he said was “Edited with comment tracked.” So (she pulls up the email). I just review what the comment is: “It’s unclear what part was taken directly from the article,
the…” I usually, you know, just accept the changes, if it’s something that he deleted or whatever, then I’ll go in and fix it.
Which I’ve already done, and I will take you to (umm, we don’t want to deal with this, [presses ‘don’t save’] because I’ve already taken care of it). Then we go down to the website so, I have it cued to the homepage. This is the homepage, for the company, which is the company I work for. And here is that blog (clicking).
And uh, as you can see I go in and it’s literally the exact same thing, with however the change was that I incorporated it.
Now, I’m just going to show you the back end of the website. And how, this is called the content management system, and I can’t give you too many details, cuz, I mean, you have to have credentials and stuff but, I don’t want it to be hacked or anything. Oops, sorry, I’m not creating a new one. Give me just a moment (clicking on different things for the blog). I just meant to search for it, and to show you how I kind of in put it, because this is not something that I learned from school, so, I’m going to go ahead and edit it, and hopefully it doesn’t change the date on it, I’m just going to., like hit cancel. But, all you have to do write the title, select which state, these are all the states that we are in (scrolling down), and I do the blog tags, which I’m not sure why those are not showing up, but umm, here it is (looking at the text of the blog post). And then you just go through, and I’d say you paste it, but you have to do a little bit more editing, like you have to take out the spaces and everything. Now we are going to hopefully just hit the “back” button and pretend that we weren’t here, and that it is still the 18th (checking the date). I’ve done it once where I clicked save and it updated the date, and our reports get messy if that happens.
So, everything looks OK still, and I think that’s really all that I had to show you, that’s pretty basic for all of the blogs that we have to do. But, um, the content management systems that I’ve worked with, I’ve only ever worked with in internships, that’s not something that the school does a very good job of assigning a project where you work with a content management system. If I were a personal blogger, I would have experience with it, but I haven’t taken the time to become one, so, umm, the point is, that’s not something the school has ever showed us. But, I think that that’s all I have for you! And I hope that this research helps. Thanks, bye!
September 8, 2013

Mr. Jon Smith
123 First Street
Dallas, TX 75201

Dear Jon,

On behalf of everyone at TechCo, we’d like to thank you for your continued patronage! At TechCo, we strive to provide each customer with the most cutting edge technology.

Today, I am writing to you regarding your recent order #01234567. The Apple iPod Nano you ordered is on its way! Due to a slight mix-up we have upgraded your package to expedited delivery. You should receive your product overnight! In the midst of this misunderstanding, an incorrect shipment has been sent to your address. In turn, please return the incorrect item to the return address on the package. We have enclosed a reimbursement check any postage fees associated with returning this product.

Once again, we certainly appreciate your understanding. As a result of this unfortunate mix-up, we have also sent you a coupon code for 25% off your next order, online or in stores. We hope you enjoy your new product and look forward to doing business with you in the future!

Sincerely,

Manager, Customer Service
September 8, 2013

Ms. Sandy Williams
567 Second Street
Dallas, TX 75201

Dear Sandy,

On behalf of everyone at TechCo, we'd like to thank you for your continued patronage! At TechCo, we strive to provide each customer with the most cutting edge technology.

Today, I am writing to you regarding your recent order #76543210. The 47" LG LCD TV you ordered is on its way! Due to a slight mix-up we have upgraded your package to expedited delivery. You should receive your product overnight! In the midst of this misunderstanding, you have also been shipped an Apple iPod Nano; please keep it as a complementary gift from TechCo.

Once again, we certainly appreciate your understanding. We hope you enjoy your new products and look forward to doing business with you in the future!

Sincerely,

[Name]
Manager, Customer Service
Date: September 8, 2013
To: Fred Durst <freddurst@techco.com>
BCC: Jane Adams <janeadams@techco.com>
From: [Email address redacted]
Subject: IMPORTANT - Product Shipping Mix-up

Fred,

Unfortunately, there has been a mix up in the shipping of two substantially different product orders (orders totaling $1500 and $100). John Jacobs notified me as soon as he realized his mistake. However, the products had already been shipped.

I need you to ensure that the following product orders are shipped *overnight* to the correct customers at the correct addresses. (See below)

**Apple iPod Nano -- Product #95843947**
Mr. Jon Smith
123 First Street
Dallas, TX 75201

**47" LG LCD TV -- Product #240958048**
Ms. Sandy Williams.
567 Second Street
Dallas, TX 75201

I have already notified the affected customers of the situation, and what we are doing to handle it. We will also be receiving the LG TV initially sent to the incorrect recipient (Mr. Jon Smith), as they were instructed to return it to us.

Thank you for your timely assistance and cooperation in resolving this problem. I will keep you posted on any updates as I receive them. Feel free to contact me with any further questions.

Thank you,

Manager, Customer Service
Date: September 8, 2013
To: Fred Durst <freddurst@techco.com>
BCC: Jane Adams <janeadams@techco.com>
From: 
Subject: IMPORTANT - Product Shipping Mix-up

Fred,

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Mr. Jon Smith  
123 First Street  
Dallas, TX 75201

**47” LG LCD TV – Product #240958048**  
Ms. Sandy Williams  
567 Second Street  
Dallas, TX 75201

I have already notified the affected customers of the situation, and what we are doing to handle it. We will also be receiving the LG TV initially sent to the incorrect recipient (Mr. Jon Smith), as they were instructed to return it to us.

Thank you for your timely assistance and cooperation in resolving this problem. I will keep you posted on any updates as I receive them. Feel free to contact me with any further questions.

Thank you,

Manager, Customer Service
In regards to the recent shipping mishap within TechCo, I have compiled a few possible additions to our current order policy. I feel that, if selected, these recommendations would ensure the reduction of order mix-ups.

Rewards System

Implementing a rewards system based on an individual's consistency of correctly processed orders could prove beneficial to TechCo. Motivating employees by rewarding them with extra days off, free products, etc. could certainly reduce the number of order mix-ups. Employees would become more careful and pay closer attention to detail if rewards such as those previously mentioned were at stake. This could, however, become costly to the company, and potentially instill questionable ethical values in employees.

Manager Signature on Orders of $1000+

If TechCo were to enforce this stipulation, yet another set of eyes would be reviewing expensive orders. It is essential that shipments of this value are sent to the intended recipient. On the other hand, this will require more time on the manager's part, possibly leading to an increase in hours, or the creation of an assistant position to the manager. Overall, the underlying importance of reducing shipping mix-ups and increasing customer satisfaction surpasses the manager complications that could possibly stem from this instatement.

Conclusion

I encourage you to review these suggestions. As you can see, something needs to be done in regards to improving TechCo's ability to properly fill and ship orders. Over the years, it is apparent that the same mistakes are being made, and in order to remain competitive in today's market, customer satisfaction is essential. Therefore, improving the quality of order fulfillment and execution should be top on the list of our priorities.
Date: September 16, 2013
To: Jane Adams <janeadams@techco.com>
From: 
Subject: Thank You!

Jane,

I just wanted to extend my gratitude in your selection of my proposed order policy change. Without your encouragement, we would still be seeking an alternative to improve TechCo’s order fulfillment issues. I ensure you that you have made an excellent decision in imposing a manager’s signature on orders of $1000+. Once again, thank you for your approval and support.

Sincerely,

Manager, Customer Service
In regards to the recent shipping mishap within TechCo, management has felt it necessary to improve our current order policy. After careful review, the following addition will be included in TechCo's order policy. Please note that this stipulation will be implemented IMMEDIATELY.

**Manager Signature on Orders of $1000+**

In order to reduce order mix-ups, especially expensive ones, TechCo will be enforcing the requirement of manager signatures on orders totaling $1000 and over. It is essential that shipments of this value are sent to the intended recipient. Having another set of eyes review expensive orders will hopefully eliminate, or at least diminish the problem at hand. We do realize that this will create yet another responsibility for managers; however, the underlying importance of reducing shipping mix-ups and increasing customer satisfaction surpasses the manager complications that could possibly stem from this instance. If any questions or problems arise from this policy change, I encourage employees to contact me in order to come up with a solution.

**Conclusion**

In order to remain competitive in today's market, customer satisfaction is essential. Therefore, improving the quality of order fulfillment and execution should be top on the list of our priorities. Thank you for cooperating and abiding by TechCo's newest policy addition. I am confident in the decision to move forward with this requirement for the betterment of TechCo.
Date: September 16, 2013
To: John Jacobs, Jane Adams, Sally Rae
From: [Blank]
Subject: September Performance Review – John Jacobs

Over the years, you have certainly proved to be a dependable employee to TechCo. As a dedicated and hard-working individual, you have definitely been an asset to the shipping department team. Few issues have accompanied your time thus far with TechCo; therefore, only limited action is necessary to improve overall performance.

Areas for Improvement

In the shipping department, attention to detail and quality order assessment is essential to completing everyday tasks. Taking the time to improve yourself in these areas could make you an even better employee. On September 8, two product orders you were in charge of were mixed up. Unfortunately, the two orders had substantially different values ($1500 and $100). Due to the significant price differences of the orders, the situation was particularly alarming. Double-checking orders is encouraged, and now, with the implementation of managers signing off on orders of $1000+, TechCo is hoping to stress the importance of correct order processing.

Strengths

Several events in the past come to mind when appraising your value to this company. On February 9, you were involved in the technology assessment presentation to TechCo’s top management team that heavily impacted the company’s decision to incorporate more efficient technology in the shipping department. Your communication skills contribute a great deal to the success of TechCo, and this is only a single example.

As previously mentioned, you are a dedicated employee. After five years of employment, you have strived for mastery in each task presented to you. This has not gone unnoticed. The promotions you have received have been well-deserved. It is somewhat uncommon to find these traits in such young employees today. You are a highly appreciated staff member.

Overall Compatibility

TechCo is proud to call you an employee and pleased to have retained such a dedicated worker for such a long time. We hope to see you grow further into our company and continue to improve your overall performance.
September 18, 2013

Sam Jennings
Human Resources Representative
New Resources
12345 Brick Road
Ames, IA 50011

Dear Mr. Jennings:

Allow me to respond to your request regarding information on employment for John Jacobs. Mr. Jacobs was initially hired by TechCo as an intern in May of 2008. He has worked his way up to Assistant Manager in TechCo’s shipping department. He is a bright young man with a knack for all things technological, a highly accountable individual and a reliable employee.

Not only does John assist in overseeing the majority of employees within the shipping department, but he is also required to assist in giving progress presentations to the company’s top management team. John primarily deals with order processing and managing inventory waiting to be shipped. Each day, he is responsible for the oversight of a high volume of shipments.

As our company has expanded dramatically, we have seen John grow, as well. Mr. Jacobs completes all of his assigned tasks in a timely matter and with a pleasant attitude. He has handled everything thrown at him with such poise, even under extreme pressure.

John Jacobs has nothing but a bright future ahead of him. He will definitely be missed by everyone here at TechCo. Anyone would be lucky to have Mr. Jacobs; I would highly recommend him. Feel free to contact me with any further questions regarding Mr. Jacobs’ time with us at TechCo.

Encl.: Evaluation form for John Jacobs

Sincerely,

Manager, Customer Service
APPENDIX K

BEYONCE’S SCREENCAST REFLECTION ON ASSIGNMENT 1

Screencast on Assignment #1

Overall, the messages packet assignment, I think went pretty well for me. I thought there were a lot of good examples in the book for me to follow, so if I came across any problems, I just went to the book or asked some of my peers for advice on what they would do.

Probably the only problem I came up with was towards the end, and questioning who I should address specific memos or letters to (highlighting the TO: line on the performance review), for example this performance review. I wasn’t quite sure.

Um, for deciding whether or not to use an email or a letter, for example, in telling my superior about the shipping mishap, I decided to send her an email just because in today’s workplace, we probably use email to contact our superiors, or let them know about something as opposed to a letter just because it gets the message to them faster. Because they’re most likely on their computer, at work and would be able to see that faster.

And I also sent an email to Fred Durst, the shipping manager, about the products that he needed to send to the correct recipients. And for the thank you. I decided to get a little bit creative, too, and I did end up creating a letterhead for Tech Co. I thought it would be more realistic because most likely you are going to have something like that given to you at work, so I just included that. And most of the book examples had that in their formatting, so it was easier for me to follow the correct format by just making my own letterhead.

Overall, I think this assignment was really beneficial, because every document that I was required to create will most likely come up when I am in my profession after I graduate. So, it was nice to get to apply it to a real world situation.

Thank you.
Hi, it’s Ms. Schieber here. So I have to say, I absolutely love the header and the logo that you used. It looks fantastic. I can tell you worked on it for a while and it looks really great.

For the first one (first page), I really like the buffer that you use. I think that’s fantastic. “We’d like to thank you…” so that was really nice. Umm, I would urge you not to overuse exclamation marks. Let’s see, 1, 2, 3, 4. It looks like 4 or 5 just in this one, so they can be really overused, try not to overuse them in business communication.

Let’s see, you said “check any postage,” I would just put “for” right there, “Check for any postage.”

OK, for the second one, again, really nice tone, I really like the information that you give, so that’s fantastic.

#3, I like how you give Jane the information that she needs, and then you also give her the attachments. I think that’s really helpful because then she knows exactly what you did, so that was a really great idea. I liked that a lot.

For #4, let’s see, you had great address information and it was really clear. There really couldn’t be any more confusion after this, so that’s awesome.

Let’s see, for #5, I really like the headings, I think those are really clear. And I like your options. You give different options and you talk about them, so I think that’s fantastic.

For this one (#6) the only thing I noticed here, you said “I ensure you,” I think you mean “I assure you.” So just, uh, quick spelling error there. But, I like how nice and polite it is, that is fantastic.

For #7, really good subject line. The only question that I feel is not clear here is which manager, umm, so we’re not sure which manager this is, who it is, who’s going to be taking over that role. So, just be very very clear.

For #8, really great detail and nice headings.

In #9, I just noticed some discrepancies, sometimes you referred to him as “John” and then sometimes you call him “Mr. Jacobs,” and then “John Jacobs,” so you’ve got all of them going on. Just, however you refer to him, keep it the same.
Midwestern University Wrestling Awareness Improvement: Bringing Arena Magic to the Mat

Prepared for

Midwestern University Marketing Department Associate
Ames, IA 50011

Prepared by

Beyoncé
Ames, IA 50011

December 9, 2013
December 9, 2013

, Marketing Dept. Associate  
Midwestern University Athletics  
Jacobson Athletic Building  
1800 South 4th Street  
Ames, Iowa 50011-1140

Dear Ms.:

In this formal report you requested, we aim to explain to you the need for increased promotion of Midwestern University’s wrestling program. We have pointed out a few key problems and several solutions that would positively impact the program.

Our research has pointed to an absence of fans attending duals; attendance numbers have been dwindling since the departure of Coach Cael Sanderson, who accepted a job at Penn State University in 2009. Through conducting surveys, interviews, and various research, we have accumulated an astounding mass of information showing the need for an adjusted marketing campaign for the university’s wrestling program. Our group feels passionately about the matter at hand and is dedicated to resolving the issues present.

Thank you for looking into the possibilities we are about to present and for the time taken to consider our entire proposal. We are happy to provide any further research or assistance needed throughout the implementation process. We look forward to your thoughts on the research presented.

Sincerely,

Beyoncé M.

Beyoncé M.  
Team Member
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Executive Summary

In order for the Midwestern University wrestling program to continue growing and remain competitive, there are many changes that we feel need to made. Midwestern University has one of the most loyal fan bases in the country; combine that with the competitive nature of Iowa wrestling, and one would think that the Large Red Bird mascot wrestling program would be wildly successful. While this was true some years, recently the attendance has been declining, and fans are becoming more excited for other sports such as football and basketball, because the fan experience at these events are much more intriguing. However, we are confident that if this program adopts our revised strategies, it will reach full potential. Below is a quick summary of the suggestions our group has developed.

Promotions

- Better use of social media to the inform the student body & the public about the date and time of events
• Mass e-mail to student body to notify them about upcoming meets and duels
• Giveaways to all students in attendance such as t-shirts, rally towels, autographs, etc.
• Free pizza or other food available to students who attend events (note: this has been done, but has been poorly advertised)
• Autograph & picture sessions with the wrestlers after meets
• Ticket giveaways at other Midwestern State sporting events

Experience
• Cheerleaders and dancers mat-side
• More exciting introductions for the athletes, such as a hit tape similar to the basketball and football teams’, and smoke/music upon entering the floor in Arena Coliseum
• Create a student section, such as Large Red Bird mascot Alley for basketball games
• Incorporate a small pep-band as done for football and basketball games to play school songs and keep people engaged
• Brighten up the lights so they aren't so dim, to create a more electric and exciting atmosphere
• Encourage fans to yell and cheer by having animated words on the big screen

**A long term goal would be to eventually sell enough tickets to have the entire coliseum opened up for seating.

Annualize Beauty & the Beast
• In our surveys, a lot of people talked about how this was an event that they looked forward to, but it only occurs every three years
• This event attracts gymnastics fans and wrestling fans
• Historically, this event always draws a significantly larger crowd than usual

Introduction
To reach full potential, English 302 students have proposed a re-vamp of the Midwestern University wrestling program. As marketing majors, our group has researched the program and the people surrounding it to find ways to improve and expand Large Red Bird mascot wrestling. In order to fully grasp the problem, we have included comparisons in attendance, etc. from other successful college wrestling programs. Reading on, you will see our recommendations regarding different techniques that may be implemented to improve the program.

Purpose and Scope
In recent years, the athletes and coaches of Midwestern State wrestling have worked hard to maintain the tradition and rich history of the program. However, since the entire state of Iowa is known for its aggressive wrestling nature, the competition is very high, and sustaining a successful program can be difficult. The purpose of our research was to
develop a new blueprint for Large Red Bird mascot wrestling. Our hope is that with this plan we can help recreate this platform to help it become just as successful as it used to be.

This report will cover several topics about MIdwestern State Wrestling primarily regarding their current attendance statistics, interview summaries with student athletes, and our suggestions to improve the overall program. Our research will not include some on-site research as well. We also have included some testimonies from the Large Red Bird mascot wrestlers themselves, along with their coaches and some staff in the MIdwestern State Athletics department.

**Assumptions**

The recommendations that we present are based on the assumption that if the current marketing strategies for the wrestling program are continued to be used, they will prove to be ineffective. We also based our research on the expectation that MIdwestern State will continue to boast a highly ranked collegiate wrestling program.

**Methods**

The information in our report comes from online sources and personal interviews with the wrestlers, MIdwestern State athletics staff, and university students. We found several good sources, but the best information that we obtained came from the athletes themselves; they expressed their interest and excitement for these potential improvements to the program. We also referred to the success of several other collegiate programs including in-state rival, the University of Iowa. These resources have given us much useful information on which we have based our recommendation.

**Limitations**

The information in the report was limited for a few reasons. First, we had a short time constraint of less than half of a semester, and we had limited access to the coaching staff since the wrestling season is currently in full swing. Other limitations exist because we do not necessarily possess the authority to implement these ideas without the permission of higher authority such as the athletic director of MIdwestern State Athletics. Therefore, we were unable to observe any of the actual effects our suggestions would make.

**Definitions**

There are several wrestling jargon used throughout the report that we would like to address. Simply put, the term dual meet refers to a wrestling meet between two teams where matches are held between two wrestlers of opposing teams. In collegiate wrestling there are ten weight classes and each team has a representative for each weight. In tournaments, a team can have as many wrestlers they want per weight class. Another term mentioned, takedown, is used in wrestling when a wrestler takes his opponent down and receives two points. Lastly, Arena Magic is a phrase used to describe the atmosphere of MIdwestern State home basketball games. The phrase was coined after the 1989 Large Red Bird mascot upset of the No. 3 Missouri Tigers. A Des Moines Register sportswriter headlined the
sports page, “Arena Magic Spells ‘Upset’ One More Time.” Since then, Arena Magic has been thriving on the basketball court. Through the implementation of our recommendations, we hope to actually bring Arena Magic to the mat.

Criteria
The criteria our group views as relevant in order to examine the extent of the marketing problems the university’s wrestling program faces include:

1. Marketing Strategies
2. Attendance numbers
3. Public Opinion
4. Public Awareness

In order to obtain general measures of these criteria, we have conducted and analyzed online research, surveys, and interviews. Our research also led us to delve into the statistics of another in-state university’s wrestling program (the University of Iowa’s) in order to somehow gauge Midwestern State’s program against a benchmark. Overall, the content analyzed will prove to show where improvement within the program needs to occur. We primarily feel that poor promotion is a key factor in the lack of hype around the university’s program. We plan to prove this hypothesis through the presentation of the following research.

Attendance
When measuring successful marketing strategies, we felt that attendance would be the obvious numerical expression implying success or lack thereof. Therefore, we decided to retrieve the attendance numbers of past seasons. As mentioned, we also looked into the success of the University of Iowa’s wrestling program and compared it to Midwestern State’s as a sort of standard. As you will soon find out, Midwestern State compares poorly to its in-state rival and the success in attendance they have constantly had throughout the years.

Another well-known and successful wrestling environment was analyzed and compared to Midwestern State’s. The Iowa High School State Wrestling competition is an event held each year that draws in enormous crowds from all over the state. Through researching attendance numbers of the event, we have confirmed that there is a huge audience in Iowa, and Midwestern State marketers certainly need to improve their promotional strategies to appeal to such a predominant target audience.

Iowa and Midwestern State Past/Present
In the 2012-2013 season, Midwestern State ranked sixth in the nation for dual-meet attendance (Large Red Bird mascots pull in 6th-best attendance in nation - Midwestern State Daily: Wrestling, 2013). We averaged 2,455 across five home duals. Midwestern State’s best attendance was for the Beauty and the Beast meet (Gymnastics and Wrestling meets at the same time) with 3,866 in attendance. In 2007-2008 Midwestern State averaged 4,311 with a high of 8,988 vs. Iowa (UPDATED: Iowa again leads nation in dual meet attendance, 2013). The Large Red Bird mascots finished behind the University of Iowa who averaged 7,541 with a high of 14,332 vs. Oklahoma State. The numbers Midwestern State put up that year is where we would like to achieve with our changes in put. These numbers are attainable and have been proven to be attainable. Of
course, our long-term goal is to have the consistent attendance level similar to where the University of Iowa is at.

**Iowa High School Wrestling Comparison**

The state of Iowa has always been known for wrestling. Iowa is ranked at the top out of all states for high school wrestling in attendance. There are roughly 80,000 in attendance throughout the four-day tournament (*Iowa ranks at top in state wrestling tournament attendance*, 2007). The final matches, held in Wells Fargo Arena in Des Moines, sell out each year. Iowa high school wrestling’s rich tradition has been noticed nationwide and has even been mentioned in *Sports Illustrated*’s 2007 article, *The Pride of Iowa*. Cael Sanderson, the only undefeated collegiate wrestler from Midwestern University quoted in the article: “When I came to Midwestern State as a freshman, and, remember, I’d been a four-time champion in Utah, somebody asked me if I thought I could have won even one in Iowa. That's the attitude.” This is a prime testimony to the high Iowa standard of wrestling.

Wrestling is in our state’s blood. The fans are present. There is more interest in wrestling in the state of Iowa than any other place in the nation. It is the university’s job to take advantage of such an audience and draw in larger crowds. A collegiate program should receive as much, if not more attention as an in-state high school tournament, especially in the state of Iowa.

**Surveys/Interviews**

In order to appropriately grasp a general consensus regarding the public’s view of the current state of the university’s wrestling program’s promotional ability, we decided to conduct a few interviews. First, we met with a representative from Midwestern State’s athletic department and a student sports writer. Our group also surveyed students and non-students, as well as searched social media sites in hopes of finding suggestions or comments on the program’s current state. After gathering all observations and recording survey results, we have grown to further understand the changes wanted by the public.

**Athletic Department Associate Meeting**

We met with an associate for Midwestern University’s athletic department, on Wednesday, November 6th. She showed us around the marketing department, and we were introduced to many different people within the department. We discussed our proposal and she was excited to read it. She liked our ideas of trying to make wrestling home duals a more exciting environment for the fans and the wrestlers. She was intrigued by our ideas of adding a mini pep band, cheerleaders, turning the lights on and the possibility of adding wrestling to the Large Red Bird mascot Alley committee. Continued research was requested and led to the composition of this report as a final comprehensive effort to present the need for a re-vamped wrestling marketing campaign.

**Midwestern State Daily Reporter Interview**

We interviewed an Midwestern State Daily wrestling reporter Beau Berkley on his opinion of Midwestern State’s wrestling atmosphere and the program’s promotions.
Beau has been a wrestling fan his whole life and has been frustrated with the attendance numbers the last couple years. We even uncovered one of his tweets expressing his frustration with the students’ attendance, or lack thereof (Figure 1). He said he feels as one of the top wrestling programs in the nation, MIdwestern State should have more pride in the sport and should be putting up better numbers as far as attendance goes. He mentioned that MIdwestern State is a ranked team this year with high expectations and would think attendances would be on the rise this year.

**Figure 1**

Surveys

In order to gauge public opinion and awareness of MIdwestern State wrestling, our group conducted a survey of our friends and family. We made sure to include a good distribution among males and females, as well as including ISU students and non-students. Such a distribution adds credibility to the survey. Below are the results (Table 1) and a short analysis of the pretty obvious need for more awareness and a better overall meet experience.

**Table 1**
As you can see, the numbers imply poor public opinion regarding the current marketing strategies. The majority of students who had previously attended a home meet ranked their experience an average of 5. Obviously, the low average ranking can be improved and should become a priority of the university’s marketing department. Another interesting observation we made is that out of those who haven’t attended a home meet, everyone unanimously agreed that it was due to poor promotion. Our group also took into consideration the suggestions of survey takers when writing our final recommendations. The suggestions even aligned with our personal thoughts on ways to improve the promotion of home meets. Below is a graph (Figure 2) displaying the distribution of experience ratings among those who completed the survey.

Figure 2

<table>
<thead>
<tr>
<th>Have you attended an ISU wrestling meet?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
</tr>
<tr>
<td>18</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>If yes, what would you rate your experience as (on a scale of 1-10, 10 being highest)?</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
</tr>
<tr>
<td>3</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>If no, do you feel it was due to poor promotion?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
</tr>
<tr>
<td>7</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>male</th>
<th>female</th>
</tr>
</thead>
<tbody>
<tr>
<td>14</td>
<td>11</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>ISU student</th>
<th>non ISU student</th>
</tr>
</thead>
<tbody>
<tr>
<td>16</td>
<td>9</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>25</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Suggestions</th>
</tr>
</thead>
<tbody>
<tr>
<td>giveaways</td>
</tr>
<tr>
<td>more social media (adding an Instagram)</td>
</tr>
<tr>
<td>beauty and the beast event each year</td>
</tr>
</tbody>
</table>

As you can see, the numbers imply poor public opinion regarding the current marketing strategies. The majority of students who had previously attended a home meet ranked their experience an average of 5. Obviously, the low average ranking can be improved and should become a priority of the university’s marketing department. Another interesting observation we made is that out of those who haven’t attended a home meet, everyone unanimously agreed that it was due to poor promotion. Our group also took into consideration the suggestions of survey takers when writing our final recommendations. The suggestions even aligned with our personal thoughts on ways to improve the promotion of home meets. Below is a graph (Figure 2) displaying the distribution of experience ratings among those who completed the survey.
Looking at demographics, you can see that males and females had similar experience ratings (see Figure 3). Each male and female portion also had average ratings of only 5 on a scale of 1-10.

![Figure 3](image)

**Note:** Pink represents the female portion of our survey participants and blue, the male portion.

### Conclusion and Recommendations

All of the research that we have conducted supports the decision to bring Arena Magic to the mat for the Large Red Bird mascot wrestling team. What we mean by this is that we would like to see more promotions surrounding the wrestling meets, an overall more entertaining experience, and making one of the program’s most successful events (the Beauty and the Beast Event) an annual ordeal. The surveys, interviews, and statistics all contribute to helping this become a reality.

We believe with a couple changes to the dual meet set-up and promotions we can create a more electric atmosphere. A more electric atmosphere will equate to larger attendance numbers. The University of Iowa excels in the atmosphere category. Midwestern State needs to be right up there with it. The marketing department can bring Arena Magic to the mat. We can achieve this by duplicating the success from Iowa.

First, we recommend bringing in a small pep band in to bring more of a college atmosphere to the meet. The band would play the school fight song on and off during the meet. After a win they can play the fight song before the next wrestlers entrance
song comes on. We also recommend there to be cheerleaders that sit mat side. The cheerleaders would cheer before and after every mat. We believe the more noise we can create the more the crowd will get into it. The crowd is quiet because it is silent when they are wrestling that no one wants to be the only person saying something. People are more likely to cheer and yell if there is already some noise being produced. We also think that since the lights are dimmed that it creates an atmosphere that makes some want to fall asleep. We understand that it looks cool with a spotlight on the mat and a dark crowd but it does not help with our crowd noise. If we make it brighter in Arena, people would be more likely to make some noise.

A more educated audience helps with crowd participation as well. By adding graphics up on the jumbo screen telling the crowd when to yell would definitely help with crowd noise. An example would be when ISU gets a takedown; a graphic displaying “2” would make the crowd yell two creating noise and excitement. Adding a Large Red Bird mascot Alley committee to wrestling meets would add excitement to the meet as well. Large Red Bird mascot alley is currently only a part of men’s and women’s basketball. They are in charge of in-game promotions and starting chants at the games. Having people in charge at a wrestling meet to conduct chants would supplement crowd noise and participation.

The following three subtopics are what we feel capture the aspects of the program that need improvement. As a recap, we will briefly outline the several suggestions we recommend to address each of the program’s flaws.

**Promotions**
- Better use of social media to inform the student body & the public about the date and time of events
- Mass e-mail to student body to notify them about upcoming meets and duels
- Giveaways to all students in attendance such as t-shirts, rally towels, autographs, etc.
- Free pizza or other food available to students who attend events (note: this has been done, but has been poorly advertised)
- Autograph & picture sessions with the wrestlers after meets
- Ticket giveaways at other MIdwestern State sporting events

**Experience**
- Cheerleaders and dancers mat-side
- More exciting introductions for the athletes, such as a hit tape similar to the basketball and football teams’, and smoke/music upon entering the floor in Arena Coliseum
- Create a student section, such as Large Red Bird mascot Alley for basketball games
- Incorporate a small pep-band as done for football and basketball games to play school songs and keep people engaged
- Brighten up the lights so they aren’t so dim, to create a more electric and exciting atmosphere
- Encourage fans to yell and cheer by having animated words on the big screen
**A long term goal** would be to eventually sell enough tickets to have the entire coliseum opened up for seating.

**Annualize Beauty & the Beast**
- In our surveys, a lot of people talked about how this was an event that they looked forward to, but it only occurs every three years
- This event attracts gymnastics fans and wrestling fans
- Historically, this event always draws a significantly larger crowd than usual

**References**


Rejuvenate Your Job Search Game this Break

Finals have come and gone and it’s time to relax, right? Wrong. Your job search should be kicking into high gear this time of year. Whether you’re a graduating senior seeking full time employment or an undergraduate with several semesters remaining, your job search shouldn’t be hibernating during these next few months of winter. Utilize this newfound “free time” to rejuvenate your job search game and evaluate your current tactics.

“...But the Spring Career Fair is so far away!” you may be thinking. But getting a head start is never a bad idea. Reconnecting with old contacts, updating your resume, drafting cover letters, cleaning up your LinkedIn, even designating go-to interview ensembles are just a few examples of preparation that can be done over break. Come Spring, you won’t have to worry about juggling schoolwork and career fair preparation simultaneously.

So, this break, make it your personal goal to prioritize your job search related goals. Make a to-do list, complete it, and reward yourself accordingly with Netflix time, etc. Trust me, you’ll thank yourself later!
September 2, 2013

Dear Mr. Smith:

Thank you for your continued business with TechCo! Unfortunately, your latest purchase from TechCo was shipped in error, and we regret to inform you that you will need to return this shipment (GPS system). However, we will pay for your return shipping and give you a $50 gift card for future purchases. Your purchase of SD Card Reader (a $100 value) will also be refunded and shipped for free.

Our company is continuing to evolve into new technologies, and we hope that your home’s and business’s technology continues to evolve with us.

Sincerely,

[Signature]

Human Resources Manager
September 2, 2013

Dear Ms. Williams:

We’re excited to share great news with you! In addition to the state-of-the-art GPS system (a $1500 value) that you just ordered, you will also be receiving an SD Card Reader ($100 value) for free!

This SD card reader will allow you to read multiple SD cards and USB units at once, which is supportive when multitasking and downloading multiple pieces of information at once. It is very helpful in both small businesses and homes, leading to multiple uses. Please be assured that the SD card reader is the same quality as all other TechCo products.

You will be receiving this SD card reader before your GPS system, and although there was a mistake with the shipping, please be assured that steps have been taken to fix the problem.

Thank you for your continued loyalty to TechCo; we’re confident that you will find your new products helpful and useful.

Sincerely,

A

A

Human Resources Manager
As of late, TechCo has had a few different shipping mistakes involving the customer orders, sending the wrong product to the wrong person.

In response to a recent shipping mistake, I have taken action to correct the wrongs. A $1500 product (GPS system) was shipped to someone who ordered a $100 product (SD card reader), and the $100 product was shipped to the person who ordered a $1500 product. To fix the problem, the first person (ordered a SD Card reader) was given free shipping to ship back the GPS reader and to get the SD Card reader, a $50 gift card, and the SD Card reader for free. The second person (ordered GPS system) was given the SD Card reader for free.

Actions are being taken to fix future shipping problems such as these, and TechCo will continue to provide quality products and customer service to their clients.
Date:   September 2, 2013

To:   Fred Durst

From:   A #

Subject:   Shipping Mistakes/Shipping Instructions

Yesterday, there were mistakes made in the shipping department, with the wrong product being sent to the wrong person in two different instances.

To fix the problems, I have taken a number of actions. The person (Ms. Williams) ordering the GPS system received the SD Card reader; she will keep the card reader. She also needs to have a GPS system shipped to her. Mr. Smith (SD Card reader) received the GPS system; she will be shipping this back (free shipping). She also will be receiving her SD Card reader for free, a $50 gift card, and free shipping for her SD Card reader. Your actions are to send Ms. Williams the GPS system (Harcourt, Iowa; #199412); you also will need to send Mr. Smith the SD Card reader and a $50 gift card (Lincoln, Nebraska; #199413). You should be receiving the GPS system return within the week.

If you have any ideas to solve the future shipping problems similar to these, please let me know. Actions will be taken to solve comparable issues as soon as possible, and TechCo will continue to provide quality products and customer service to its clients.
As you know, TechCo had a shipping complication this past week, and I have been working on a solution to prevent future problems. I have been working with Fred Durst to find a resolution to this issue.

I believe that all orders over $1,000 need to have a manager signature to confirm that the product is being shipped to the correct person. There are several ways to go about doing this. The first idea I had was to print all orders over $1,000 on a bright colored paper (neon yellow, blue, etc.), and these would be sorted into a special part of the warehouse. Fred or another manager would then go through with their clipboard to double-check the shipping address, giving their signature on the clipboard and shipping label. Another idea I had was basically the same as the first, without the brightly colored paper. I do not think this would work as well, as no one would know what boxes are over $1,000. A final idea that I had was to have Fred or another manager put the shipping receipt inside the box, and when there was an order over $1,000, this would be noted on a clipboard. At this point, Fred would sign the shipping receipt as it was put in a box and sign the clipboard. Although this could work, the manager might be pulled away with another responsibility, halting the entire process. I believe that our best choice would be the first, as the manager could work on their pile when they had time and it would be easy to tell what orders were over $1,000.

Please let me know what you think about the shipping policy changes, and the modifications will be put into place as soon as possible.
September 4, 2013

Dear Jane,

Thank you so much for your continued dedication to TechCo, and your prompt response on the shipping policy changes. It’s great to know that there are such hard working people that care so much about our company. I look forward to continuing to work with you in the future.

Sincerely,

A
Date: September 5, 2013
To: All TechCo Employees
From: A A
Subject: Change-In-Policy Shipping Information

In the past week, there have been a few shipping mistakes that led to changes in the shipping policies. These policies will begin at on Monday, September 9th and will affect multiple departments.

Starting Monday, orders over $1,000 will need to have a manager’s signature. Orders over $1,000 will be noted by a neon yellow shipping label. As the packages are sorted, packages with these tags will be put in an area (to be determined by shipping managers), and managers will give their signature on the receipt in the box and on their clipboard (where the item, customer name, and order number will be noted). This force us to double-check and confirm that the product is being sent to the right address and person.

If you have any questions about these changes, please ask me. Additionally, inform me if you have any other ideas for preventing future shipping problems.
John Jacobs has been an asset to TechCo since he started working for the company in March 2008, but his recent shipping mistake cost the company money and possible customers.

**Areas for Improvement**
John needs to work on going slower to cause fewer mistakes; although being quick is an asset, sometimes it is beneficial to work slower to improve accuracy. On September 2, 2013, he made a critical shipping mistake that cost the company over $200 and may have lost us customers. This mistake also caused us to add a policy to shipping instructions. Although there were many shipments that day due to the holiday weekend, working slower may have eliminated this problem.

Another area John could improve upon is to double check his work, confirming that his actions are correct. A simple action such as this will help him to eliminate costly mistakes to TechCo. This also may have eliminated his mistake on September 2, 2013.

**Strengths**
John has many assets that make him an asset to TechCo.

John is a hard worker; he rarely takes a day off or calls in sick. This quality helps him to always complete his tasks, even if he has to skip his lunch break to do so. I especially noticed this quality following Labor Day weekend this year, as there were many orders to process following the extended weekend.

Another strength John possesses is kindness, as he is always willing to help a coworker or friend in need. Many of his coworkers go to him on a bad day or when clarification is needed on a new rule or policy. For example, on Friday, May 10, I remember him detailing a new rule involving phone orders and employee protocol to Rachel Meyers. He was very thorough and willing to answer any questions she had.
Concluding Thoughts
John Jacobs has been an asset to our company for the five years he has worked for TechCo. Although he had a critical mistake in the past week, his positive qualities still make him a strength to our company.
September 10, 2013

Mrs. Susan Meyer, Human Resources
United States Postal Service
640 Lincoln Way
Ames, Iowa 50010

Dear Mrs. Meyer:

I am writing to respond to your request for an evaluation of John Jacobs. As a public resources manager for TechCo, I have gotten to know John very well over the past five years. Although we did not work in the same department, John and I often ate lunch together and bounced ideas off each other for new policies. In addition to this, I also was on the interview team for John’s application process at TechCo. He impressed us during the first interview, and it has been a pleasure getting to know him over the past five years.

John Jacobs was one of my hardest working employees as TechCo, rarely calling in sick or taking vacation days. He always made sure to complete his assigned tasks, often taking shortened or late lunch breaks so he got his jobs done. John also was kind to everyone, making sure to help someone who was confused, needed help performing their duties, or needed someone to talk to on a bad day. Another quality I enjoyed in John was that he was a quick learner; his managers had to tell him once how to use a new computer program or how a new policy affected him.

If I could go back to his first interview at TechCo five years ago, I would definitely hire him again; he is a hard worker and has an outstanding personality. Please call me if you need any additional information; I will be happy to help. My only regret about writing him this recommendation is knowing that he is leaving TechCo.

Sincerely,

[Signature]

A
Human Resources Manager
Hi, this is (Annie) recording Screencast Review 1. This assignment went pretty well for me, the only thing I really struggled with was, um, the coming up with 3 different solutions for the shipping problems that we had in the past. Umm, the only one I really could come up with off the top of my head was the one about shipping orders (scrolls down to the part of the assignment where they did the change of policy suggestions), on a brightly colored piece of paper. The other 2 I really had to think about before I wrote it down. I had to do a lot of brainstorming about that for what would be a good idea. I dealt with this problem by just being creative and trying to think about what would work and what wouldn’t work.

Another thing I struggled with was the performance evaluation (scrolls down to that document), because even though it was a negative evaluation, I decided it was the only mistake, the only major mistake that John had ever really made, so it was hard for me to tell him about that even though he hadn’t really had any major problems in the past.

Umm, I decided what to include in the different notes by thinking about what the audience needed to know. For example, in the memo that went to everyone about the shipping changes, umm, I’m not sure where that’s at, oh, here it is (page 7), I decided that the umm, entire store, uh, entire department did not need to know that John Jacobs had messed it up, and like that the produce was sent to the wrong person, just that what the policy change was and what we need to change in the future.

Other specifics I did, err, other specific decisions I made when I created these documents, umm… When I did the first couple memos I decided that it really wasn’t important for Mr. Smith to know that this was such a valuable product that he was shipped on accident, and I also decided that Miss Williams didn’t need to know that we shipped her GPS to the wrong person, because that might have given her the wrong idea that Tech Co was careless, and I decided that probably wasn’t the best reputation that we could give our company, since she might need future orders from us.

Umm, other decisions that I made, such as why I chose an email over a letter. Umm, I did mainly memos, just because our book gave more examples of memos, and I also decided those would be easier to format, and umm, easier to give out to everyone.

Well, that’s my project. Thanks!
APPENDIX Q

ANNIE’S INSTRUCTOR FEEDBACK ON ASSIGNMENT #1

Hi, Annie, it’s Ms. Schieber here. I just wanted to quickly go through your assignment #1 with you. Ok, so we are looking at part 1 right here, you have a really nice looking heading right here. It looks nice and clean. The only thing that you are missing here is we don’t have addresses, either for TechCo or Mr. Smith. Typically we have that on a business letter, so that’s something that we need. I like this section right here (top of paragraph), some information is missing though, when will his product arrive. So, uh, he knows that you will send it to him, but he doesn’t know when it’s going to get there. And you have some nice goodwill here towards the end (of #1).

#2, again, we don’t have the addresses. You have a very polite tone; it’s very nice. Try not to over-do it with the exclamation points so, here we have one (beginning of part 2), and then I think you used them again elsewhere. And it can be really easy to do, especially when you have something like this, umm, that you want to tell them about, that you’re really excited about. Just try to be careful with it; it’s something that we try not to overdo in business communication.

For #3 you mention, let’s see, you have really nice tone. You mention the SD card reader twice right here: “you get the SD Card reader, a $50 gift card, and the SD Card reader for free…” so it just sounded, I think you just accidentally said it twice. So, that was a little confusing. Umm, you’re talking about clients, but you’re speaking to Jane (the fictional supervisor), so I would say change this to “our clients,” because you both work for TechCo.

#4 you have some nice formatting right up here at the top. Let’s see, you mention Mr. Smith and then “she,” and I’m guessing you just meant “he.” Nice information, nice and clear. I like how you have the order numbers and everything.

For #5, let’s see here. I like the different options that you have. I think it’s really detailed. Umm, one thing I would like to see you do is just kind of split up the ideas into different paragraphs. This is a really big chunk of information, and it can be easy to get lost in it, even though you have great information. So, I would say separate this into different paragraphs.

Umm, #6, I thought this was really nice. I love the polite sound. Great thank you letter. #7, umm, you have really nice subject line. Just a few things that I would maybe rephrase. You have “being at on Monday,” so I’m guessing you just meant one of those. “will begin ON Monday,” or something. Umm, let’s see, “This force us to double-check..” umm “WILL force us to double-check..” or something like that. Just a missing word right there.

Ok, for #8, nice headings, nice and clear. One thing that I feel is missing here is what exactly happens. So, you have the date, which is fantastic. And you talk about the critical shipping mistake. So, just be really clear; he mixed shipping orders between this customer and this customer, or if you just want to have their customer numbers or something, that’s fine. But, since this is going to go into his file, it needs to be as clear as possible.

Umm, ok, and then for the final one, #9, I thought the tone was really kind and then very detailed as well, so really nice job with that.
Letter of Recommendation

The Pottery Store,

In this document you will find the report that we discussed in October. We have provided key information and made recommendations on a plan of action for marketing ideas to provide more demand for pottery from your business. We are recommending that The Pottery Store implements more technologies, including more Facebook statuses, Pinterest, and YouTube. We believe that utilizing these resources will help the company gain interest in people from around the world, as well as prompt their current Facebook followers to attend shows they are attending or new sales they are offering. We also suggest that the company begins hosting more events at the store, as well as attending new shows to increase awareness of the business, as well as remind previous customers of their existence.

The A Team used several different resources in forming our analysis. We contacted several newspapers to get quotes for weekday and weekend advertisements. We also took a survey of how many people shopped locally and regarding hand-made items. We also analyzed several different pottery websites, including The Pottery Store, Glazed Expressions, and Produce Station Pottery.

Thank you for allowing the A Team to have the opportunity to work with The Pottery Store in creating a marketing plan. If you have any further questions about the research or recommendations please contact us at 800-351-1082 and we would be happy to answer any questions. We look forward to hearing what variations you have decided to make and what the results of these changes are.

Sincerely,

Annie

Annie

The A Team Member
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Executive Summary

To increase sales and demand for The Pottery Store products, The A Team is recommending increased use of technological resources and the attendance of new events and local shows. We believe that these tools will help to increase knowledge of the company and products, as well as remind previous and existing customers of the great service and pottery of The Pottery Store.

To increase demand and sales for The Pottery Store, The A Team recommends the following:

1. The Pottery Store should increase their use of social media and available technologies. The research we have done indicates that many people are interested in shopping locally, especially during the holiday season. We also know that more and more people are using social media and technology to get their news and gift ideas. Because of this, we believe that increasing The Pottery Store's social media presence will lead to increased sales and demand for products.
   - Begin utilizing Pinterest, allowing people around the world to see the many products that The Pottery Store has to offer, as well as increasing viewing of the company's website, leading to increased sales and interest.
   - Post more status updates on Facebook, reminding your followers of the pottery and sales that the company offers.
   - Make the recommended changes to the website, giving the company a competitive edge in comparison to other local pottery websites. We believe that the easier the website is to use, the more website viewers will be retained.
   - Begin posting on YouTube how The Pottery Store performs different steps of the pottery making process, allowing YouTube users to learn more about pottery and increase their desire for a hand-created item.
   - Utilize our survey results, offering more sales and handmade items. We believe that these are the things that people love to shop at small businesses, especially during the holiday season. Because of this information, we believe that increasing knowledge about The Pottery Store is even more important.

2. The company should also begin utilizing more advertising/promotional events, leading more people to know what The Pottery Store has to offer.
   - We believe that creating new events at the storefront will encourage more people to come to the store and shop. Additionally, we believe that these events will increase people’s knowledge that the store exists.
   - Another idea that we had was to attend new local events, including town appreciation days and different craft and art shows from the norm. Attending these types of events will increase community members’ knowledge of the business and what the company has to offer.


Introduction
The A Team recently contacted The Pottery Store to create a marketing plan for the company to create more demand for pottery, especially in the local areas. The A Team has researched The Pottery Store and their visions to determine what ideas would bring success to the company.

Purpose and Scope
The Pottery Store is a successful business located in Dayton, Iowa, that has been growing continuously since 2006. With more and more people becoming interested in handmade products, The Pottery Store wants people to know of their products and company. The purpose of our research was to research different ideas for The Pottery Store to expand business and demand for their products.
This report will cover several categories of marketing ideas for The Pottery Store, including technology ideas and advertising/promotions. All created webpages and accounts have been deactivated to allow the company to analyze them before the public sees them.

Assumptions
The recommendations were made based on the assumption that The Pottery Store has time to make products that result from additional demand. We are also assuming that the company has a desire to have more marketing in both technology and print forms.

Methods
The information in our report comes from different research that the A Team has performed. We have called several local newspapers to find out what their rates are for weekday and weekend advertisements. The A Team has also created a survey that almost 100 people filled out detailing shopping preferences and habits. Another thing we worked on was analyzing competing pottery websites to determine if The Pottery Store should add anything to their website. These resources have given us a plethora of information that we have based our recommendations on.

Limitations
Our report is limited because we had many different ideas that we wanted to research for The Pottery Store, but we did not have the time or resources to investigate all of them. Another limitation the A Team struggled with was competing pottery businesses. Although we realize that they exist, we could find very few of these websites, causing us to have fewer recommendations based on these competitors that we desired.

Definitions
There are a few terms that we use throughout the report that we would like to explain beforehand. The first is FMCP, which is an abbreviation for The Pottery Store. We will also be discussing Pinterest, a social media website that allows users to save pictures and websites to their own account. The survey we conducted was through Survey Monkey, a web based survey company that allows users to respond to and create surveys.
Criteria

Many different things were used to make recommendations for The Pottery Store. The main part of this was Annie’s knowledge of the company from previous experiences. One thing that she made during her internship was compiling a list of customers from each year, allowing her to know that the customer base is mainly women. She also had several conversations with Tyler asking him what he thought of the many different ideas that The A Team had. Another criterion that was used was the website of The Pottery Store, which helped us to have a better understanding of the visions and culture of the company. Other things that helped us to make our recommendations included general understanding of the world and technology. For example, it is common knowledge that fewer people have been reading newspapers as the years have passed and technology use has increased.

Technology Ideas

Our group decided to break our marketing ideas into two different segments, starting with technological. We believed that this was more important due to increasing use of technology, social media, and computers for everyone around the world. Although The Pottery Store has a technology presence with their website and Facebook, we decided that it would be a good idea to make this existence more expansive.

Pinterest

Our group decided that a Pinterest presence would be a great thing for FMCP to begin using. Annie has conducted previous research with The Pottery Store in which she noticed that the majority of customers were women. According to Tech Crunch, 97.9% of Pinterest users are female. The A Team noticed a potential correlation between this information, and they believed that using Pinterest may lead to an increase in sales and demand for FMCP products. Because of this, Annie created a Pinterest account for the company, making boards for different types of products, as well as promotions for shopping locally and attending different craft and art shows that FMCP attends. However, this account has been deactivated for the time being until the company can evaluate it for changes needed.

Facebook

The Pottery Store already has a Facebook presence, but the company is unable to post many statuses due to a very busy schedule and a long to do list. After talking to the business, we discovered that the major problem was that coming up with ideas to post was difficult, causing us to come up with a solution. We decided that A would come up with a list of Facebook status ideas, allowing FMCP to tweak them a little before posting
them. The statues are all unique and interchangeable, while still requiring very little effort and thinking for the company.

- **New Year’s Eve**
  - Bring some nice new flare to your New Year’s Eve party with some custom made party bowls and glassware.

- **Valentine’s Day**
  - Psst. Hey you. Do you have a special lady at home or a crush on the girl working 3 doors down? Come on down to the store and let us find you a monogrammed vase, plates or even a flower pot, to still her heart again and again.
  - The best things in life come in pairs. This Valentine’s Day swing on by and get 20% off all items sold as pairs from February 10-15.

- **Easter**
  - The Lord has risen. Come check out all our beautifully hand crafted religious décor that will be addition to your homes as we celebrate our savior.

- **Thanksgiving**
  - This is a day to give thanks. Nothing says thank you better then serving Grandma’s secret spice pie at Thanksgiving then putting it in one of our pie plates. All pie plates will be 10% off starting November 1st all the way to November 20th.

- **Black Friday**
  - On Black Friday will be having a discount kettle. Pull a slip from the kettle to see what you have won. Prizes vary from 10% off total order to $75 in store credit.

- **Cyber Monday**
  - We here at The Pottery Store would like to say thank you to all our customers by giving 15% discount on all orders free shipping on orders over $75 before 15% discount, and any customized orders placed on Monday will receive 35% their customized item this Monday.

- **Small Business Saturday**
  - Being proud business owners we would love to share our gratitude to all our customers. Come on by and take advantage of the great deals we have in store. All of our Botanical Impressions and Crocheted by Laura will be 15% off.

- **Christmas**
  - Wanting some fresh and unique Christmas décor this year? We have an array ornaments and luminaries to choose from. All of which will be a great addition to you home for the holidays.
  - Let us give thanks and praise while celebrating the birth of our savior. Come check out our Nativity scene products, and religious décor that will for sure be a great addition to your faithful home.
Website Analysis
The Pottery Store’s website is very functional and supplies great information about the company including background history, product listings, schedule, and contact information. One of the biggest benefits the website has is its products page, where most products are easily shown and prices, dimensions as well as other basic information is shown. This website offers many great benefits, but after some navigating through The Pottery Store’s website and reading the under construction notice, we believe we have a few helpful ideas for improvements that will help to better match the aesthetic quality of the pottery itself. The main page offers a lot of information, with different fonts and pictures. Starting with an entrance page with links provided to each section of the website would help to break the information into smaller divisions would make it easier to focus the customers search. Exploring new fonts, background colors, and even higher quality images of products and other essentials would help bring up the level of style that you might be looking for.

Glazed Expressions
Glazed Expressions is one of the most well-known pottery businesses in the Des Moines metro area, which puts them in a competing market with your company. Stylistically, the two websites are close. Glazed Expressions chooses to display their information with a simpler approach on the website. They do a good job of getting customers involved and creating a sense of community, which shows them as more than just a pottery producer. Offering pottery classes, open houses and other events that help build interest into this specific area are all great ways to build this type of loyal customer base that will treat you more like family than just another business.

Produce Station Pottery
Out of the two competitor websites, this would be the better choice to take stylistic advice from. Judging from the website, Produce Station Pottery has a different attitude about their business. They tend to an older crowd that might appreciate this art form for different reasons. The website doesn’t come off as family oriented as Glazed Expressions, but offers all of the same basic features that all three websites include.

The Pottery Store Recommendations
Our last piece of advice is something you probably already realize, which is the importance of finding your niche. Each obviously far from perfect, but they seem to have found their focus. After looking Glazed Expressions and Produce Station Pottery, the biggest difference is solely the amount of time each company has been in existence. The Pottery Store is a relatively new company and as you continue to grow by adapting your own ideas as well as others mixed with a lot of hard work, than there is no reason to think that The Pottery Store will be nothing but a success.

YouTube
Another idea that The A Team had was to create YouTube videos showing different processes used for making pottery, increasing interest and curiosity in viewers. Annie went to the business during Thanksgiving break to record several different processes, including glazing and firing. If The Pottery Store decides that a YouTube presence is
desired, Annie is more than willing to create this YouTube account and record more videos in the future.

**Survey**

We also conducted a survey using SurveyMonkey, asking almost 100 people’s opinions about shopping locally. The A Team has analyzed these results and believes that the results will help The Pottery Store serve its customers better.

**How often do you shop locally?**

This question tells us that The Pottery Store has many different potential customers in the people they surveyed. The A Team believes that the majority of people shop locally sometimes (see question 3) due to price and availability of items, especially since buying items online for a lesser price is becoming more and more popular.

**How often do you shop locally during the holidays?**

We decided that it would be an excellent idea to break question one down further into shopping habits in the holiday season, and we believe that many people shop locally during the holiday season due to the convenience, desire for a unique gift, and the promotion of Small Business Saturday. Because of this, we believe that The Pottery Store is doing everything right; they produce unique items and were open for Small Business Saturday on November 30. Additionally, they are centrally located for many different small towns and are on the route to go to Des Moines or Ames for a shopping trip.

**What is the biggest influence on if you shop locally?**

The answer to this question had an overwhelming majority of people answering cost, leading us to believe that promoting the company as lower priced than competitors and highlighting the deals that it offers would increase sales for the company.

**Pick one deal listed below that would draw your attention to shop locally for the holidays.**

This question had generally inconclusive results, but we decided that almost any kind of deal motivates people to come buy products due to the need to spend less money. We recommend utilizing something similar to option B or C due to increased traffic around these answers.
Although the deal might not be as lucrative as those listed, we still believe that these would draw more customers into The Pottery Store.

**Advertising/Promotions**

The other category of marketing ideas that the A Team created was not technology based, but related to Advertising and Promotions outside of the computer screen. We believed that this category was also important because the company is both click and mortar as a store, meaning that people are visiting the store, as well as using the internet resources that FMCP already has. Additionally, some people are not as comfortable using computers, so it is important to have marketing and promotions in addition to technology based marketing.

**New Events**

One thing that we believed would increase demand for The Pottery Store products was better awareness of the company locally. We believe that creating new occasions in the storefront and attending new events would help the company to achieve their goals.

**Store Events**

The Pottery Store opened storefront in 2010 and like any other business, publicity is very important. Attending art festivals and events throughout the country, state, and region will help spread word of the business and eventually bring in sales. Setting up a booth at any event will and giving handouts will spread the word. Here is a small sample of events that are worth attending for the upcoming year:

- **May**
  - Marion Arts Festival
  - Mississippi River Valley Art Drive
  - Dubuquefest
  - Tulip Time (Pella)
  - Valley Junction Spring Art Market

- **June**
  - Quad Cities Pride Fest
  - Pioneer Days Festival (Clarksville)
  - Summer Celebration (Sioux Center)
  - Iowa Arts Festival (Iowa City)
  - Governor Days (Grimes)

- **July**
  - Des Moines Art Festival
  - Humboldt Art Festival
  - Fourth of July Celebration (Des Moines)
  - Grinnell on the Fourth
  - Marshalltown Fourth of July Celebration
  - Dallas County Fair (Adel)
  - Algona Founders Days Festival
New Local Events

One of the important topics that was brought up in the web site analysis was the idea of creating your personal branding story or finding your niche. One option was to create a family friendly and build a relationship with the local families. There are many great opportunities for store events including open houses, tours, classes for all ages offered weekly, discounts for return customers, sales on different types of product, giveaways. People love free stuff. A great idea is to create an event where you can invite customers and advertise a free giveaway of a small item that is low cost. The list of options is practically endless and with the extra work and friendliness towards customers will go a long way into building a great customer base.

Newspaper Advertisements

The final item that our team did research on was newspaper advertisements, investigating rates of local newspapers for both weekend and weekday editions.

Fort Dodge Messenger

The first newspaper we contacted was the Fort Dodge Messenger, located about 30 minutes from the company. Both editions of the paper have the same rates for advertisements, which are run in eight inch columns. We discovered that a 2x4 column advertisement is $215.60, while a 3x4 advertisement is $311.52. Both rates are in black and white.

Ames Tribune

We also contacted the Ames Tribune, who runs advertisements that are the size of business cards. A weekend advertisement of this size costs $112, which also comes with a free Wednesday advertisement. While contacting the newspaper, they shared that the Story County Sun may also run advertisements for low or no cost to local events, which may be beneficial during The Pottery Store open houses and craft shows. Ames is about 45 minutes away from Dayton, the headquarters of FMCP.

Gowrie News/Dayton Review

The Gowrie News and Dayton Review are owned by the same company, and they advertise in six inch areas. Each area costs $24. Dayton is the location of The Pottery Store, while the town of Gowrie is located about 15 minutes away.

Recommendations and Conclusions

Technology

The A Team recommends implementing the new technologies that have been created for The Pottery Store, especially Pinterest and Facebook. We believe that using these accounts will allow the company to gain more business, as well as remind previous customers of the existence of The Pottery Store.
Promotions/Advertising

We believe that The Pottery Store should investigate creating new store events and going to new shows and town appreciation days. However, at this time we believe that newspaper advertisements would be ineffective based on the newspaper rates and decreasing amounts of newspaper readers and subscribers. However, we think that the Story County Sun newspaper should be researched further. We recommend focusing on new events and technology based ideas.
References

Fort Dodge Messenger. (2013, November 8). Telephone interview.
APPENDIX S

ANNIE’S FINAL REFLECTION

To: Mrs. Schieber
From: Annie
Subject: Final Reflection

Final Proposal Audience
Our group believed that the only audience for our proposal were the owners of The Pottery Store, as they do everything “in house” for the business. The audience wanted several easy ways to improve sales and demand for The Pottery Store products, leading us to come up with easy marketing ideas that the company could perform. The audience values faith, hard work, and time management, the latter of these being what we focused on. Because of this value, we decided that they needed easy ways to increase sales for the company; for example, A brainstormed different Facebook status ideas that T can post easily to increase the time he can spend doing other important aspects of the business.

We tailored our message and tone to the owners of The Pottery Store by making it more personal. I already knew the company, so I felt that it was unnecessary to use memo format for the paper. Additionally, we chose an artsy-business look for the final proposal, as we thought that Tyler would find a plain business appearance very boring. One example of us tailoring our tone to the owners of The Pottery Store was through the use of basic vocabularies, rather than very advanced science and math words. If they think that the idea is a good idea to implement, they do not need advanced science to back it up. If they have more questions, they know that they can ask me. The audience needed to know additional information about different technologies and why they should use them, as well as different prices and analysis of our survey. This led us to organize our proposal in two different sections, one focusing on technologies and the other centering on promotions and advertising, as we thought these were two different parts of our proposal and would help us to break them up more. We also used many different subheadings throughout our paper to make navigation and reading easier.

One thing that we decided not to tell the audience is about pottery, which they clearly know a lot about. We also decided that it was assumed that they know that they have very little time on their hands, something that they already know as owners and operators of The Pottery Store.

ENGL 302 Evaluation
I have really enjoyed taking ENGL 302, as I feel that it has taught me a lot about the many facets of business communications. My favorite part of the course was the final project. Although it was a lot of work to create and implement different ideas, it was exciting for me to see these ideas come to fruition. I know that I will be applying many of these skills in the future, especially the different writing skills I took away from it.
APPENDIX T

ANNIE’S WORKPLACE BLOG WITH COMMENTS
APPENDIX U

ANNIE’S WORKPLACE SCREENCAST

This is the article I created, describes the organization I’m working with, umm and an organization that funded a web-based app that’s being developed. I learned to create this document, which is a news article, through trial and error, and umm, using different examples that exist, as well as looking at different guides that exist within our organization.

Issues that I faced, umm, right now this is, umm, a pre-draft, umm, the event hasn’t actually happened yet, it’s happening this afternoon. But, different issues that I face are that people don’t always respond to email very quickly, and I don’t always have the full story. Sometimes when I’m working with different science related topics, umm, I don’t always entirely understand what they’re working with, but I have to try and figure out the best way to describe that.

Other issues that I sometimes face is that people aren’t always forthcoming with information so it’s hard to get enough length in the article, so that it looks like a good article.

Uhh, I work through these issues by being persistent with emails and as well as being patient. Sometimes people are travelling or have other stuff going on, or sometimes the email just gets lost, so I have to make sure to resend those if I don’t get a response in a certain amount of time. If people aren’t very descriptive, and I don’t understand something, I usually ask for more information after I’ve written the article. Umm, those are the main issues I face when writing news articles, so thanks!
APPENDIX V

TRANSCRIPT OF ANNIE AND HER SUPERVISOR’S DISCUSSION

A- ANNIE, B- SUPERVISOR

A- Figure out.
B- Yeah... Ok.

A- Umm, is the caption “A Character in the Finland Games Came to Monsters university and 2013” better?
B- Yes, it’s more descriptive... yeah, that’ll be fine.
A- Well, what is passive voice?
B- Ok, so passive voice is when you use a “to be” verb, so “is.” So, you wanna take out, take out that “is...”
A- Ok.
B- Do you have that example?
A- Uh, yeah. “The Finland Farmville team is made up of Monsters Students”. Would “Monsters Students make up the Finland Farmville team” be better?
B- Yes.
A- Ok.
B- Yeah, that’s deleting passive voice, yeah.
A- Umm, let’s see here. I can’t think of any other comments right now.
B- There was the one, the one with the “is” that is making.
A- Oh, what about “George Lopez, a computer scientist, is creating and designing the app.” What should I do about that?
B- Ok, so you wanna take out the “is” verb just to tighten up the language.
A- So, would I just do “create the designs” then?
B- Yes.
A- Ok.
B- Yeah.
A- Alright.
B- So you’re just pulling in the language a bit. Ok.
APPENDIX W

SAM’S ASSIGNMENT #1: THE MESSAGES PACKET

Sam
Messages Packet #1
2/8/2013
Danica Schieber

| Negative Adjustment/Apology Letter | 2 |
| Positive Adjustment/Apology Letter | 3 |
| Memo to Jane Adams | 4 |
| Memo to Fred Durst | 5 |
| Special Request Email Jane Adams | 6 |
| Thank you to Jane Adams | 7 |
| Change in policy memo | 8 |
| Negative performance review | 9 |
| Letter of recommendation for John Jacobs | 10 |

January 26, 2013

Mr. Smith:

Within three business days you will be receiving a package containing the Modem Super L driver for your Delappc computer. This Modem Super L is not the correct order that you placed on January 25, 2013 with TechCo, LLC.

In lieu of the shipping mix-up, we offer for you to keep the Modem Super L despite ordering Modem Mediocre L driver. We feel that the Modem Super L compliments your computer system registered with TechCo and is a wonderful
upgrade from Modem Mediocre L. In the event you decide not to keep the Modem Super L driver, TechCo offers you an online store credit of $1500.00. Please see enclosed postage label and shipping instructions for returning the Modem Super L driver if this is the route you choose.

Again, we apologize for this inconvenience and look forward to your continued business. If you have further questions or comments, feel free to contact:
Stanley Cartwright
VP of Human Resource
800-683-7780
s.cartwright@techco.com

January 26, 2013

Ms. Williams:

Within three business days you will be receiving a package containing the Modem Mediocre L driver for your Delappc computer. This Modem Super L is not the correct order that you placed on January 25, 2013 with TechCo, LLC. In lieu of the shipping mix-up, enclosed you will find a postage label and shipping instructions for returning the Modem Mediocre L driver.
TechCo is shipping your original order of the Modem Super L driver expedited, free of charge. Please also note that you will receive a full refund of $1500.00 through any TechCo retail outlet; your online account is also included in the refund.
Again, we apologize for this inconvenience and look forward to your continued business. If you have further questions or comments, feel free to contact:

Stanley Cartwright
VP of Human Resource
800-683-7780
s.cartwright@techco.com

Date: January 26, 2013
To: Jane Adams
From: Sam
Subject: Order and Shipping Mix-up

On February 5, 2013 an order and shipping mix-up occurred resulting in two TechCo customers receiving the wrong product.
Ms. Williams ordered the Modem Super L driver, retailing at $1500.00 and received the Modem Mediocre L driver retailing at $100.00. Mr. Smith ordered the Modem Mediocre L driver and received the Modem Super L driver that was intended for Ms. Williams. An accidental switch in the shipping department is the root cause of this situation.
In order to remedy the situation and maintain goodwill with both customers of TechCo, I sent the two attached letters to both Mr. Smith and Ms. Williams. In
short Mr. Smith has a choice to keep the Modem Super L device or return it and receive an online store credit of $1500.00. Ms. Williams will receive the correct shipment expedited and receive an online or retail outlet store credit of $1500.00. Do not hesitate to contact me for further discussion or clarification.

Sam
VP of Logistics
515-683-7772
sam@techo.com

Date: January 26, 2013
To: Fred Durst
From: Sam
Subject: Expedited Shipping Order
On January 25, 2013 an order and shipping mix-up occurred resulting in two TechCo customers receiving the wrong product.
Ms. Williams ordered the Modem Super L driver, and received the Modem Mediocre L driver. Ms. Williams needs to be shipped her correct order, the Modem Super L driver, expedited. Please see that Ms. Williams’ package is sent out promptly.
Additionally, be watchful for the return of the Modem Mediocre L driver from Ms. Williams and please notify me upon its arrival with an email or phone call.
Sam
VP of Logistics
515-683-7772
sam@techo.com

To: Jane Adams j.adams@techco.com
Cc: 
Bc: 
Subject: Improved Shipping Verification Policy
With regard to my memo sent to you January 26, 2013 about the shipping mix-up that occurred, I would like to suggest a new company-wide policy requiring a manager’s signature for orders equal to or greater than $1,000.00.
Employees in the shipping division will request signature from a member of the managerial staff in the shipping division on the bottom of the bill of lading that accompanies each item sent from the warehouse. The bill of lading includes a description of the product being sent and its destination; employees must also provide the invoice of the product to cross reference with the bill of lading.
This policy will provide a check and balance system for TechCo preventing further errors in the future. This policy is not meant to decrease efficiencies instead to insure proper distribution and handling of TechCo products for customer service and internal traceability. I would like this policy to go into effect as soon as possible to prevent any further errors.

Regards,
Jane,
Thank you very much for looking further into implementing my policy I suggested a week ago. I know this improvement will keep TechCo running smoothly and improve our customer satisfaction. Again, thank you for working with me to improve our shipping division.

Sam

Date: February 6, 2013
To: TechCo Shipping Division
From: Sam VP of Logistics
Subject: Shipping Verification Policy

In an effort to improve shipping order accuracy, TechCo is implementing a policy requiring signature of a division manager on the bill of lading for orders equal to or greater than $1,000.00, effective immediately.

Employees in the shipping division must receive signature from a division manager on the bottom of the bill of lading for items equal to or greater than $1,000.00. A copy of the invoice is required also to cross reference with the bill of lading. This must be done before item is loaded onto the truck. If a division manager is not available, request a signature from the secretary in the warehouse office.

This policy will provide a check and balance system for TechCo preventing further errors in the future. This policy is not meant to decrease efficiencies instead to insure proper distribution and handling of TechCo products for customer service and internal traceability.

Questions regarding this policy may be addressed in person to Sam in the warehouse office. If I am not available, feel free to email me or leave a note with the secretary.

Sam
VP of Logistics
515-683-7772
sam@techo.com

February 6, 2013
To: John Jacobs
Cc: Jane Adams
From: Sam
Subject: Performance Review of Shipping Mix-up

Since transferring from truck driver to warehouse foreman, you have been a great asset to TechCo in keeping our shipping division on time and in order. Unfortunately the shipping mix-up on January 25, 2013 has warranted a performance review.

At times the warehouse can get very busy and it is important for all employees to dutifully check each order as it is packaged, labeled and loaded into the trucks. On January 25, you were unable to correctly verify each package being loaded and TechCo had an accidental switch up with products and customers. Despite your previous history of attention to detail, you overlooked this situation and it resulted in a slight hitch in the shipping department. Fortunately, both customers were taken care of and TechCo continues to receive their business.

We request additional care and attention to detail will be taken when checking and verifying orders in the future. In addition to this, we feel the new policy put into effect February 6 will reduce these mix-ups as well. TechCo encourages all employees to double check all work insuring accuracy and customer satisfaction.

Sam
February 8, 2013

To Whom It May Concern:
This is a letter of recommendation for John Jacobs who has worked for TechCo since 2001. John started in the distribution division driving truck. In 2004 John applied through me to be foreman of the warehouse floor. I hired John because he is a diligent worker who made his best efforts to help every employee correctly and safely do their job for the TechCo Shipping Division.

John has been a productive, efficient foreman for me for the past 8 ½ years. Our warehouse ships out hundreds of products everyday that are loaded into multiple trucks going to a variety of different retail and postal outlets. Attention to detail and quality of work are two of John’s most valuable assets. John has kept our warehouses running efficiently and our trucks on time with little to no guidance or prompting; he is a very self-motivated worker.

Despite John’s quality of work in the warehouse, recently an order was mixed up and two products were switched in labeling resulting in them being sent to the wrong customer. John promptly informed me of this mistake in a very professional manner and took full responsibility for the mix-up.

It is unfortunate that John has decided to leave TechCo, but I fully support him in a career he chooses to pursue now and in the future. If you would like to further discuss John’s employable qualities, please feel free to call me.

***SIGNATURE***
Sam
VP of Logistics
515-683-7772
sam@techo.com
APPENDIX X

SAM’S FINAL PROJECT PROPOSAL

April 10, 2012

To: Danica Schieber

From: Sam

Subject: Proposal to research feasibility of production and selling of Pizza Cones in addition to Smiles and Gyros, Inc products on Welch Avenue.

Proposal Description:
My project will focus on implementing a new late night food vendor serving pizza cones. Pizza cones are made from pizza dough and filled with various pizza ingredients, warmed in an infrared oven and given to the buyer. Pizza cones are an attractive alternative to pizza slices due to the portability of a cone (think ice cream cone).

Opportunity Description:
Welch Avenue in Iowa is home to two city blocks of bars and nightlife for students of Iowa State University. Along the sidewalks of Welch Ave currently are two food carts serving hotdogs and gyros; occasionally a fajita vendor. Additionally there are sandwich shops, a burrito restaurant, and an establishment that serves pitas. One block east of Welch Avenue is a pizza parlor that serves slices as well as entire pies, amongst other numerous pizza parlor items. The key is an alternative to hot dogs, gyros, and burritos that is a faster pickup and consumption than a traditional slice of pizza. Both the hot-dog stand and the gyro cart are owned by the same business,
Smiles and Gyros, Inc and share costs with one another. It is my belief that pizza cones would provide a quality brand extension complementing both carts and providing additional income for Smiles and Gyros, Inc.

**Work Plan Description:**

Following an executive summary of what the business involves, the following categories will be researched and complied to find whether or not a viable business is possible selling pizza cones on Welch Avenue:

1. Production
   a. Time window from ordering to serving cone(s) maximizing amount of people through the line.
   b. Food safety associated with production of cones
   c. List of ingredients to maximize speed of order as well as speed of creation of cones
   d. Feasibility of making cones ahead of time and transport of said cones

2. Pricing
   a. How will cones be priced to be an alternative rather than price competitor to hot dog and gyro carts
   b. Where to set profit margin for optimal profit combined with mass of product sales
   c. Is cash the best way to receive payment?

3. Liability and city permits
   a. Will additional permits be needed to have vendor
b. What cost may be associated with acquiring spot to make cones

c. Can pizza cone cart “piggyback” off of hot dog and gyro carts

4. Personnel

a. How many workers will be needed for production of cone from start to finish

b. How much time is required for production of cone from start to finish

c. Will additional training be required for employees who currently operate hot dog or gyro carts

Each category will be submitted in written format with corresponding numbers and analytics as needed. A Microsoft Excel file will also accompany the report.

**Timeline of Research:**

<table>
<thead>
<tr>
<th>Date Completed</th>
<th>Estimated Time</th>
<th>Event</th>
<th>Contact</th>
</tr>
</thead>
<tbody>
<tr>
<td>4/11/13</td>
<td>12 working hours</td>
<td>Production feasibility trial; pricing of equipment; trial of products.</td>
<td>Hobart Manufacturing for production equipment; Self</td>
</tr>
<tr>
<td>4/14/13</td>
<td>12 working hours</td>
<td>Market research for pricing; estimation of traffic in proposed selling area</td>
<td>Personal interviews with ISU students and Welch Avenue attendees</td>
</tr>
<tr>
<td>4/15/13</td>
<td>8 working hours</td>
<td>Documentation of costs for production of cones; financial planning for costs and profits to determine breakeven; setting of menu that reflects costs and breakeven;</td>
<td>Self</td>
</tr>
<tr>
<td>4/16/13</td>
<td>1-2 days</td>
<td>Food inspection permits and licenses associated with street food vendors; start application for permits if needed; find requirements for having vendor cart</td>
<td>Iowa Department of Health; Sara Kingland State of Iowa Department of Inspections and Appeals; Smiles and Gyros, Inc.</td>
</tr>
<tr>
<td>4/16/13</td>
<td>1 hour</td>
<td>Determine additional</td>
<td>Self</td>
</tr>
</tbody>
</table>
Knowledge and Skills:

Past and current successes in starting and running my own business have given me bountiful knowledge, understanding and know-how in managing, producing, and finding the feasibility of a brand extension. I am proficient in Microsoft Excel in order to create a financial analysis for simplistic and easy viewing. I also have connections within the State of Iowa Department of Inspections and Appeals to hopefully speed up any answers or questions with regard to health and safety of products.

Final Statement:

With your approval I will proceed with moving forward and accomplishing the aforementioned tasks, as well as including any additional ideas and thoughts you may have.
Date: April 16, 2013

To: Smiles and Gyros, Inc Development Team

From: Sam

Subject: Progress of Pizza Cone Cart

I have begun the preliminary research towards implementing pizza cones as a late night food vendor on Welch Avenue. I was able to move forward at a quick pace with regard to production and pricing of the items, and am on track with regard to the timeline. However, there have been a few issues outside my control with timeliness of returning messages and phone calls in regards to liability and permits. Because of that, I anticipate a delay of final reports until April 23.

**Work Completed**

To determine the production feasibility and capacity of making pizza cones, I created a mock set-up to manufacture dough, cones, and final cooked product. My simple way of rolling dough, creating a cone, and baking would work well in a home setting. According to phone calls and research with economy sized cone makers, operators would be able to make cones much quicker than I with the proper equipment. The largest knowledge gained was the materials and time for making pizza dough and having it stored until needed. Additionally I was able to spend time visiting with attendees of Welch Avenue during the weekend and arrive at price points as well as gauge general interest in the product. Due to food safety I did not pass out samples as I wished to do. General interest is high amongst males and there is an air of indifference with most females. I wish to complete more extensive surveying during the upcoming weekend.
**Work to Be Completed**

During the time period of 4/10-4/16 I attempted to stay in contact with Dept. of Appeals and Inspections but was unable to get consistent feedback on my questions, thus limiting the quality of my final report. I will work to compile my research and have it available for review no later than April 23.
Good Afternoon,
You are receiving this email because you or someone recommended by you taught a portion of the New Hire School last March. This year we have March 8th penciled for hosting New Hire School at the Event Building. Given the current timing, please reply with whether or not you are able to attend and teach on behalf of our university regarding your area of expertise. If there is a conflict with the date, please inform me and we can work together to find a substitute.
Regards,
Sam

MEMORANDUM
Date: 5/3/13
To: Company Consultant customers
From: Company, Inc. Sales and Support
Subject: Training and Development Updates

The Management Team has been working on continually improving the entirety of our system. We would like to thank all who have been offering suggestions to increase the usability of the website and the apps. Included are the most recent changes, some additional ones to come, as well as some suggestions to keep the system running smoother.

Website:

- Batch emailing is now available
- Emails entered at on the Grower tab are imported to the email box for reports
- More quick search options
- Company logos can be uploaded to be included on scouting reports

To come

- Printer friendly scouting reports finalized
To come

- Printer friendly scouting reports finalized
- Grower level access

Apps:

- Mid-summer update with additional photos and information
- Faster synchronizing and updating data
- Ability to run offline and record geo-location(s)

Troubleshooting Tips:

- Always check internet connectivity
- Load fields and maps and synchronize while connected to good internet before going out to scout.
- Check field names for extra spaces at the end if they will not synchronize.
- Photos can take a long time to synchronize; plan accordingly
Hello, my name is Sam. I’m gonna walk through here a memo that I put together. This was just under a year ago, uh, actually right as I was finishing my undergraduate degree. And this is for a company that I work for, umm, we periodically send out memos to our customers, just to update them on a few things. This is for some updates and development things. Just the format in general, uh, knowing how to do things, honestly, I went straight to the uh, files that I had saved from my English 302 class (business communication) that I took while at Midwestern State University. And I brought in the format. Those classes, those files were taken pretty recently for me as well, and the format right here especially was one thing that I was really struggling with. Being able to cross-reference those documents made it really easy. The one thing that I do remember in keeping things together with the memos is pretty short and sweet and then breaking it up, rather than having this all be paragraphs (scrolling here). Went through, and just a short, quick introduction, of exactly what was in this memo, specifically, and then after that, just broke it down with uh, simple headings and then bullet points. For the most part, these headings, those were just decided on by myself, uh, got a little bit of feedback from my co-workers, but in this case, this is for a company that I started as a student, so there really wasn’t someone above me to say, “hey, here’s our usual memo format, why don’t you just click and drop in the, copy and paste in the information, and then go?” So, this truly was kind of a start from scratch, as far as our company goes. The nice thing was I did have that template, if you will, or that idea from my English class. And then right here at the end, knowing how to, if I do have to do paragraphs, very quick and concise, this one isn’t that long, umm, but for the most part it just gives a general overview of what we are looking for as a company. And then finally, our last paragraph, and kind of the closing statement. Uh, one thing you don’t see in here, because I took it all out, but normally this is on company letter head, so there’s contact information here, a logo, a logo here, and then, at the very end, it would list the three account managers, and our respective contact information, for all of our employers, uh, all of our customers. Excuse me, to have access to. (Switches to new screen)
In front of me here, I just have an email that I copied and pasted and put together, but I, it was a really simple email that I, uh, talked to a bunch of speakers that I was looking for from the University nearby. Again, there was no specific, uh, format or anything, that I followed for this. It was actually sent out to a blind carbon-copy list of about a dozen people, so I wanted to keep it very short and easy to read. Uh, I was looking, again, for them to be a part of this school and so my main goal was to give them the dates, which you can see it in here, and then just the reason itself why they’re being emailed, right here at the top. Uh, then I give them the date, I wanted them to have it written in, then just ask them for a quick reply, uh, regarding their ability to teach or not. Umm, and if they weren’t, rather than go through an endless string of emails, uh, trying to determine the best placement, if you will, for them, what I did was just threw in this quick sentence at the end, trying to move forward the communication.

Again, typing the emails, it wasn’t something that I could tell you the exact dates that I learned how to do it. There have (sic) been a lot of trial and error. I know that as a student, drafting emails like this, for professors or lecturers, was pretty commonplace for me, umm, and that’s something that I just rolled over into my current career.