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Investigating the learning transfer of genre features and conceptual

knowledge from an academic literacy course to business studies:

Exploring the potential of dynamic assessment

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Abstract

Academic literacy courses aim to enable higher education students to participate in their chosen academic fields as fully as possible. However, the extent to which these students transfer the academic skills taught in these courses to their chosen disciplines is still under-researched. This article reports on a study that investigated the potential of dynamic assessment (an assessment approach that blends instruction into assessment) in the transfer of genre features and conceptual knowledge among undergraduate business studies students in a UK public university. The data includes three students' written assignments (N = nine), interviews (N = three) and business studies tutor (N = three) feedback. Drawing on Vygotskian sociocultural theory of learning and a genre theory based on Systemic Functional Linguistics, the data were analysed. The findings suggest that dynamic assessment may contribute to the transfer of genre features and conceptual

knowledge to a new assessment context. Implications of this for academic literacy

instruction and assessment design are presented.

Key words: learning transfer; dynamic assessment; business studies writing development; conceptual development; systemic functional linguistics; sociocultural theory

# 1 Introduction

The value of the transfer of learning in academic and professional contexts is widely recognised (Engle, 2012; Larsen-Freeman, 2013). A large number of studies (e.g., Butler, 2010; Butler, Godbole, & Marsh, 2013; Foley & Kaiser, 2013; MacRae & Skinner, 2011; Thompson, Brooks, & Lizárraga, 2003) have been carried out in education and psychology in order to understand the nature of transfer with regard to learning over the last century, and yet, it is still unclear how and why learning transfer occurs or not (e.g., see Day & Goldstone, 2012; Larsen-Freeman, 2013). Importantly, there are only a small number of studies on learning transfer in discipline-based academic literacy (AL) courses (Baik & Greig, 2009). Given that a key purpose of such a course<sup>1</sup> in higher education is to enable students to participate in their chosen academic communities as fully as possible, the role of learning transfer from such courses to other disciplines is paramount.

In the context of higher education, many of the higher order skills and knowledge such as problem-solving are expected to be transferable by educators. For instance, in business studies, skills like structuring a case study analysis and the application of business frameworks are those higher order skills that are required for all business studies modules (e.g., see QAA, 2007). Business graduates are assumed to transfer the skills and knowledge including cognitive, social and communication skills from their studies to their workplace as well (Jackson, 2013). Therefore, sustaining these skills and knowledge

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<sup>&</sup>lt;sup>1</sup> The terms 'course' and 'module' are used interchangeably in this paper.

is central to learning and disciplinary writing development. Despite learning transfer being a key purpose in discipline-based AL courses, research in the transfer of language and academic skills has only recently started to emerge (Baik & Greig, 2009; Cheng, 2007).

In this paper, I report on a study that investigated the potential of a *dynamic assessment* (DA) approach in the transfer of genre features and conceptual knowledge among undergraduate business studies students in an open and distance learning context. DA is defined as an "approach to understanding individual differences and their implications for instruction ... [that] embeds intervention within the assessment procedure" (Lidz & Gindis, 2003, p. 99). In this article, I begin by explaining dynamic assessment (DA) and transfer as used in this study, and then briefly review the literature with regard to 'learning transfer' in EAP and DA. Next, the research context and the research methodology are explained. Key findings are reported and discussed using the concept of 'transfer' in DA in relation to generic stages, macro-Themes, hyper-Themes and conceptual development. I conclude by highlighting the significance of DA in learning transfer.

## 2 Dynamic assessment and transfer

# 2.1 Dynamic assessment (DA)

DA is based on Vygotsky's Sociocultural Theory (SCT) of mind (1978) whereby human cognition and learning is seen as a social and cultural – rather than an individual – enterprise. In particular, central to DA is the Vygotskian notion of the *Zone of Proximal Development* (ZPD) and mediation. The ZPD can be defined as "the distance between the

actual development level as determined by independent problem solving and the level of potential development as determined through problem solving under adult guidance or in collaboration with more capable peers" (Vygotsky, 1978, p. 86). From a Vygotskian perspective, it is important to know what a learner may be able to do in the future in addition to what they can do at present. By working in the learner's ZPD, it is possible to find out both their actual and potential abilities which is at the heart of DA. DA is grounded in the notion of ZPD, and thus assessment, as a process rather than a product.

While the ZPD is about the individual's potential development, *mediation* provides an opportunity for enhancing such development. Mediation is defined as a process that humans employ in order to regulate the material world, others' or their own social and mental activity by using 'culturally constructed artifacts, concepts and activities' (Lantolf & Thorne, 2006, p. 79). In other words, from the Vygotskian SCT perspective, any human activity (i.e., higher mental functions) is mediated by objects (e.g., computers), psychological tools (e.g., text) or another human being (Kozulin, 2003; Wertsch, 2007). In the context of this study, mediation refers to the intentional and reciprocal interaction between a tutor (and/or written texts) and the learner in relation to the problems experienced by the learner and the developmental support given by the tutor, taking into account their ZPDs. Thus, mediation, which in this study is referred and operationalised as *DA procedures*, allows the tutor to collaborate on an assessment task more closely with the learner, thereby enabling the tutor to move the learner to the next level of their ZPDs.

The study reported in this article followed a DA model known as interactionist DA as described by Lantolf and Poehner (2004, pp. 58-60). In this model, assistance is expected

to emerge from the interaction between the learner and the teacher-examiner, thus responding to the learner's emerging abilities. Both the tutor and the student work together to reach the goal (i.e. in this study, writing academically valued texts in business studies).

Interactionist DA has certain basic procedures that practitioners need to follow (see Haywood & Lidz, 2007). These include: (1) identifying learners' current abilities through their independent performance; (2) identifying their problems and challenges; (3) designing intervention tasks to address these problems and challenges; (4) working jointly with learners to complete the task by offering feedback targeting their ZPD; (5) ending on a positive note of successful completion of the task; and (6) checking learners' application of newly acquired skills and knowledge to progressively complex tasks and contexts. These procedures were followed in the current study (see section 3.2).

To date, DA research has not employed a theoretically-based linguistic framework to analyse DA data despite previous studies clearly focusing on language and communicative aspects such as investigating aspects of listening (e.g., Ableeva, 2010), speaking (e.g., Poehner, 2008) and writing (e.g., Alavi & Taghizadeh, 2014). To track the potential effect of DA on academic writing, there is a need for using a robust language theory. This study aims to address this gap by using Systemic Functional Linguistics (SFL) for this purpose because SFL has a well-established descriptive framework to examine language use in social contexts to achieve particular goals (see Section 5.1).

## 2.2 Transfer

Transfer refers to learners' ability to recontextualise their learning in a new context. There are two similar terms used in DA: *transfer* and *transcendence*. While *transfer* was used by Brown and her colleagues (e.g., Brown and Ferrara 1985 cited in Poehner, 2007, p. 338) to describe more complex tasks than those used in DA tasks, *transcendence*, is associated with Feuerstein's interactionist DA approach (e.g., Feuerstein, Falik, Rand, & Feuerstein, 2002). Although DA scholars appear to use these two terms interchangeably, it has been argued that the concept of transcendence has been more robustly developed in the DA literature and is more closely in line with Vygotskian theory (Poehner, 2007).

Within EAP, the terms 'learning transfer' and 'transfer' seem to be used interchangeably to mean learning in one context impacting on performance in another context (e.g., see James, 2014). Additionally, 'adaptive transfer' was recently proposed by DePalma and Ringer (2011) in second language writing (see its critique by Grujicic-Alatriste (2013)). Given that 'transfer' has been widely used in DA and is accepted in the EAP literature, I am using the term 'transfer' in this study to capture both 'transfer' and 'transcendence'.

The notion of transfer in DA is derived from the Feuersteinian concept of transformability, defined as the change in an individual's cognitive knowledge that is applicable to other situations (Feuerstein et al., 2002, p. 113). Cognitive knowledge or what Vygotsky calls 'scientific concepts' (e.g., see Karpov, 2003) provide them with cognitive tools for mediating their future problem-solving. As transformability is realised through the application of newly acquired conceptual knowledge or tools to new contexts and tasks, cognitive knowledge becomes one of its essential aspects.

Transfer can be of two types: 'near transfer' and 'far transfer' (Feuerstein et al., 2002, p. 113). 'Near transfer' refers to the transfer of skills and knowledge to a specific assessment context similar to the ones accomplished in the immediate past. 'Far transfer' is the application of such skills and knowledge to a more complex and challenging context and therefore, entails more sophisticated mental functioning.

While the notion of transfer has been explored in the context of academic writing, as noted earlier, this area is still under-researched (Cheng, 2007) and results of previous studies have tended to be unclear regarding transfer in general academic writing (e.g., James, 2010, 2012). In a recent review of studies on transfer in EAP, James (2014) reported that there is some evidence of learning transfer in EAP (also see Green, 2015). However, the reviewed studies tended to focus on accuracy, vocabulary and grammar rather than at the genre level. The review also suggests that there is a need for studies that investigate the nature of EAP instruction and its impact on learning transfer.

Importantly, there seem to be only a few studies conducted in discipline-specific writing contexts which combine an attempt to track transfer of learning with an explicit focus on language. For instance, Shrestha and Coffin (2012) investigated tutor mediation and its impact on writing development from one assessment task to another one and Cheng (2007) examined transferring genre features.

The brief review of studies above on transfer in EAP strongly indicates that there is a gap regarding transfer from EAP and discipline-specific AL courses to other disciplines.

Aiming to contribute to address this gap, this paper specifically explores the following research question:

Does DA help learners transfer genre features and conceptual knowledge learned in one writing assessment task to another?

# 3. Research design

# 3.1 Research context and participants

The research site for this study was an AL module at an open and distance learning university in the UK. This module is recommended for all students who are studying or plan to study an undergraduate business studies degree at the institution and can be studied alongside business studies modules. The module is designed to enhance academic literacy skills that students will need for undergraduate business studies.

The module was designed following an approach which sees academic literacy as situated social practices in particular contexts and communities (e.g., Hyland, 2003). As such, this module aimed to enable students to participate more effectively in business studies contexts. In particular, students on this module are familiarised with a number of common genres encountered in business studies (Nesi et al., 2008). In this study, following SFL, genre is defined as 'a staged goal-oriented social process' (Rose & Martin, 2012, p. 1). Broadly speaking, these genres include case studies, essays and reports, which students are required to produce in response to business studies assessment tasks. Students learn how to analyse texts in these genres as well as create them by using appropriate content knowledge and language resources in the context of business studies.

At the time of the study, I was a tutor of the AL module. Thus, I had a dual role of a tutor conducting DA and a researcher investigating DA in the study. I focus on three participants who volunteered for the study.

Amina<sup>2</sup>, the first participant, had obtained qualifications equivalent to A levels in Pakistan, and a Diploma in IT. At the beginning of the study, she was working full-time and studying. Later she had a baby and had quite limited time for her study. The second participant was Lou who was studying towards a business degree. Lou had begun her career as a fashion designer but left 10 years previously in order to work as an administrator in prison services. The third participant, Natasha, was studying an accounting degree. She had obtained a first degree in horticultural engineering and worked as a garden designer in a garden centre in a cosmopolitan city.

# 3.2 Dynamic assessment procedures

This study implemented interactionist DA with the three participants studying the AL module described earlier. The AL module did not incorporate DA, and therefore, I, as the tutor-researcher, designed separate assessment tasks for DA in this study and worked with the participants independent of the module. These tasks, however, reflected the nature of the assessment tasks in the AL module<sup>3</sup>. There were two DA tasks: DA1 and DA2 (see Appendix for an example) completed by the participants. Each task required the participant to write a case study analysis. A business case study analysis may be broadly defined as the study of an organisation by applying a business model or framework. The participants were provided with learning materials on academic writing

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<sup>&</sup>lt;sup>2</sup> All participant names are pseudonyms.

<sup>&</sup>lt;sup>3</sup> Instead of using the existing assessment tasks in the AL module, this was done to avoid any unfair advantage to the participants.

as part of the DA intervention after the first DA task that would support them in addressing the challenges they had faced (see Shrestha, 2011 for details).

The study followed the interactionist model of DA (Lantolf & Poehner, 2004) and the DA procedures mentioned in Section 2.1. My role as a tutor-researcher was to design a DA assessment task reflecting DA procedures and jointly engage with the learner in the task at hand and reformulate the task as needed until the learner 'mastered' it. Of particular relevance was the notion of mediation ranging from implicit (e.g., hints and prompts) to explicit (e.g., correct solutions) as proposed by Aljaafreh and Lantolf (1994) for targeting learners' emerging academic writing abilities (e.g., using business concepts to frame a paragraph). In this study, mediation was by email, instant messaging or wiki comments, a novel form of mediation in DA.

A summary of the DA procedures followed in each of the two DA tasks is shown in Table 1:

Table 1: DA procedures

Procedures in DA tasks		
Tutor-researcher	Learners	
<ol> <li>Design DA tasks and send them to the participants by email or post them on a password-protected wiki.</li> <li>Provide formative feedback on the students' written response to the task by using genrebased assessment criteria (use of source</li> </ol>	<ol> <li>Write the response to the DA task.</li> <li>Send the text to the tutor by email. Participate in the instant messaging 'conversation' for the formative feedback if preferred.</li> </ol>	

- materials, text structure and development, academic style and grammar) and targeting the participants' maturing writing abilities by following flexible mediation, that is, beginning with more implicit guiding questions.
- Offer further formative feedback based on the participants' subsequent response to the previous feedback and provide more explicit mediation if needed.
- 4. Negotiate with the participants on the final text.

- Ask questions when necessary
   (e.g., when a task is not clear or a comment needs an explanation and so on).
- Revise subsequent drafts in response to the tutor's formative feedback.
- Negotiate with the tutor on the final text.

Natasha, Amina and Lou completed two DA tasks and associated procedures. Each DA consisted of the procedures listed in Table 1 above and was spread over several months, depending on the participants' availability as they were all in full-time employment and were studying part-time.

How these DA procedures were operationalised during each DA is essential to examine any effect of DA. Due to the space, however, only a summary of the tutor mediational moves and the learner response moves are presented in Tables 2 and 3 below. Interested readers are referred to Shrestha and Coffin (2012) for comprehensive details.

Table 2: Tutor mediational moves

Implicit (i.e. hints, prompts, etc.)	Explicit (i.e. examples, corrections etc.)
1. Clarifying the task	9. Checking conceptual understanding 10. Providing metalinguistic clues

2.	Accepting a response	11. Providing content clues
3.	Showing affect	12. Rejecting the response with explanation(s)
4.	Asking learner to identify the problem	13. Explaining the problem
5.	Locating part of the text needing	14. Exemplifying or illustrating
	improvement	15. Providing a choice of possible solution(s)
6.	Asking to clarify meaning	16. Providing the correct solution
7.	Identifying the problem in the text	
8.	Asking to consider a possible solution	

Table 3: Leaner response moves

o. Ask	king to constaer a possible solution	
Table 3: L	e aner response moves	
	More dependent	More independent
		<b>\</b>
1.	Asking for task clarification	9. Explaining the problem
2.	Unresponsive	10. Evaluating tutor feedback
3.	Imitating the tutor	11. Self-assessing
4.	Using the tutor as a resource	12. Incorporating feedback
5.	Checking conceptual understanding	13. Suggesting a possible solution
	with tutor	14. Verbalising conceptual understanding
6.	Responding incorrectly	15. Rejecting the tutor's feedback
7.	Asking for content clues	16. Overcoming problems
8.	Identifying the problem	

It should be noted that both tutor moves and learner moves were not linear but dynamic. This means the type and amount of these moves were not the same for each learner and their order varied depending on the learner's ZPD. For example, the tutor had to make more explicit mediational moves for Amina than for Lou. As the focus of this article is

not on the nature of DA mediation, only an example of some moves in the DA process is shown in Table 4.

Table 4: Example of moves in Amina's DA

Moves	Examples
	DA1 SWOT <sup>4</sup> analysis of Google with a missing introduction which Amina
	and the tutor discuss via instant messaging.
Tutor Move 7	Tutor: what about introducing the reader to your analysis?
Student Moves 4 & 5	Amina: like a report introduction?
Tutor Move 2	Tutor: yes, exactly. it is a report.
Student Move 8 & Tutor	Amina: introduction is missing
Move 2	Tutor: yes.
Student Move 13 & Tutor	Amina: so it should be in the first paragraph
Move 2	Tutor: right.
	Amina: saying that this is a anslysis of google and I have chosen the SWOT
	model to describe it
	Tutor: something similar

# 3.3 Transfer assignment

When the participants completed the second DA task, they were studying a business studies module and to which, it was anticipated, they would transfer their learning of academic writing. In order to examine the transfer of genre features and conceptual knowledge observed in the second DA task to another progressively challenging assessment task, the participants were asked to submit their business studies assignments, referred to as transfer assignment (TA) in this study. They submitted the assignments within a month of completing the second DA task. DA1, DA2 and TA were selected to examine any evidence of genre learning transfer (or otherwise) from DA2 to TA which was much more challenging than the DA ones.

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<sup>&</sup>lt;sup>4</sup> SWOT (Strengths, Weaknesses, Opportunities and Threats) is a commonly used framework in business studies.

## 4 The data

The data include three assignments from each of the three students (N=9), interviews with them and their business studies tutors' feedback on these students' assignments. The first two assignment texts from each student were written for DAs. The third assignment text from them was a TA. Additionally, interviews with the three students about their experience of DA and their business studies tutors' feedback on their TA were collected to complement the textual data.

# 5 Analytical tools

This paper draws on two theoretical frameworks as analytical tools in order to examine the potential of DA regarding transfer in this study. One is related to meaning-making through disciplinary writing (e.g., Coffin & Donohue, 2012) and the other is related to learning and development (e.g., Lantolf & Thorne, 2006). The first one draws on Hallidayan SFL which considers language as a meaning-making resource to achieve a social purpose (e.g., Eggins, 2004). The second framework employs the notion of transfer as outlined in Section 2.2. These two frameworks are complementary to each other because DA offers a learning theory and SFL offers a language theory which are both central to this study. Each of the tools is explained briefly below.

#### 5.1 SFL

In SFL, language is seen as a resource performing three meta-functions: *ideational* (representation of the world), *interpersonal* (interaction with others) and *textual* (organisation of language as a whole to make meanings). For this paper, in particular,

ideational and textual meta-functions were examined in relation to the three students' assignments following Martin and Rose (2008). *macro-Themes* and *hyper-Themes* (textual meaning) and use of business concepts (ideational meaning) were identified as areas for development in all three students' first draft of DA1 and were, therefore, targeted in both DA1 and DA2. *macro-Themes* predicting what the text is about, also known as Introductions, and *hyper-Themes* broadly defined as the first sentence in a paragraph play a key role in signalling text development (see Ravelli, 2004). macro-Themes and hyper-Themes are considered for their contribution to how students construe textual meanings.

In addition to macro-Themes and hyper-Themes, generic stages were examined in each assignment. In SFL, each genre is considered to follow certain stages (Eggins, 2004). For example, a case study analysis has certain stages such as Orientation and Recommendation. Generic stages contribute to both textual and ideational meanings.

Regarding ideational meaning, the use of business concepts and frameworks, drawing on the notion of *technicality* (Martin, 1993) and students' awareness of case study analysis genre were examined to track the effect of DA. Technicality also includes technical abstractions (Woodward-Kron, 2008). For example, the term 'fermentation process' in Natasha's assignment is used in the beer industry and thus constitutes a technical abstraction, given its use as a concept rather than an action (i.e., 'fermentation' instead of 'ferment'):

Technological factors affect Heineken's marketing strategy in one main way. Heineken used a specially developed <u>fermentation process</u> where non alcoholic beer had the taste and quality expected of a premium beer without liquor... [DA 1, Natasha]

In order to identify technicality in the students' assessment texts, the following criteria were adopted:

- Terms with a field-specific meaning (processes, things and qualities: e.g., external environment)
- 2. Terms defined or in taxonomic relations to other technical terms (e.g., strengths, weaknesses)

Technicality, coded by using the qualitative data analysis software NVivo 8 (QSR, 2008), was quantified by considering the frequency of the technical terms. If the same term was used more than once, it was counted more than once given differing contexts of use.

# 5.2 Far transfer

The second tool was the notion of transfer developed within Vygotskian SCT as explained in Section 2.2. In this study, only the second type of transfer, called 'far transfer', was investigated. There were three main reasons for considering any far transfer from DA2 to TA: (1) each TA was significantly longer than DA1 and DA2 as compared in Table 5 (2000 words vs. 500 words); (2) unlike the DA tasks, there were no case study sources provided but the students were asked to choose their own organisation for the analysis and find sources of information to support their analysis as shown in Table 5; and (3) the TA required the students to apply a range of business concepts and frameworks taught in their modules rather than just one framework as in DA tasks.

Table 5: Comparison between DA task and TA task (key differences highlighted in bold)

DA2 task	Read the three case study texts about Vodafone's broadband market mentioned above and write <b>a SWOT analysis</b> of this product based on the articles. Your SWOT analysis should be of about <b>500 words</b> .
Business studies assignment (TA)	Using tools and concepts from Units 1–4 of Block 3 (including, if you wish, the analysis referred to in Part 1 of this assignment), write a report which identifies the key challenges facing an organisation with which you are familiar (you may use the same organisation you described in Part 1, or in Assignment 01 Part 2 or Assignment 02). (2000 words) [from Lou's TA]

# 6 Key findings and discussion

Case study genre features and conceptual knowledge as construed in the students' two DA texts are compared with those of their TA to evidence any 'far transfer'.

Additionally, student interview data and tutor comments are discussed in relation to these features as relevant.

#### 6.1 Genre features

The genre that the students produced for both DA and TA was a case study analysis. As stated previously, however, the DA assignment required students to apply only one given business framework while the TA required students to produce a case study analysis of an organisation by applying multiple business concepts and frameworks they studied in the module as indicated in Table 5.

The students' texts written in response to the DA assignment task in this study were expected to successfully apply one of the business frameworks, that is STEP (Social, Technological, Economic and Political) or SWOT (Strengths, Weaknesses, Opportunities and Threats), to an organisation's business environment. As mentioned before, the SFL genre theory proposes that each genre such as a case study analysis follows a number of

stages. For example, a SWOT analysis text for the DA assignment included the following generic stages:

Orientation<sup>5</sup> Component 1 (Strengths) Component 2 (Weaknesses) Component 3 (Opportunities) Component 4 (Threats)

Optional stage(s):

[Summary/ Conclusion/ Recommendations]

A STEP analysis included these stages:

Orientation<sup>^</sup> Component 1 (Social)<sup>^</sup> Component 2 (Technological)<sup>^</sup> Component 3 (Economic)<sup>^</sup> Component 4 (Political)

Optional stages:

[Summary/ Conclusion/ Recommendations]

These stages were identified as successful features of a SWOT or a STEP analysis by business school academics in the institution although this might vary in other institutions. All three students' texts were analysed for the generic stages. Table 6 summarises the generic stages found in all three students' DA and TA texts:

Table 6: Summary of generic stages in student texts

Student	DA1	DA2	TA
Amina	Genre: SWOT analysis  Description (Google)^  Description^	Genre: STEP analysis Orientation (STEP)^ Description (abstract	Genre: case study analysis using job characteristics

<sup>&</sup>lt;sup>5</sup> ^ is used to mean 'followed by' in SFL.

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	Definition? (Chrome)^	ideas)^	Orientation^ Criterion 1^
	Comparison^	Description^ Recount^	Criterion 2 <sup>^</sup> Criterion 3 <sup>^</sup>
	Explanation	Description^	Criterion 4 <sup>^</sup> Criterion 5 <sup>^</sup>
	(usefulness of	Classification (type of	Criterion 6 <sup>^</sup> Summary
	Chrome)^	services)^ Description 1^	•
	Comparison (Microsoft	Description 2 <sup>^</sup>	
	and Chrome)^	Description 3 <sup>^</sup>	
	[Review]	Description 4 <sup>^</sup>	X
		[Summary]	
Lou	Genre: SWOT analysis	Genre: SWOT analysis	Genre: case study analysis
	Component 1	Orientation (SWOT)^	using various course
	(Strength)^	Component 1	concepts
	Component 2	(Strengths) <sup>^</sup>	Orientation (various
	(Weaknesses)^	Component 2	business concepts and
	Component 3	(Weaknesses)^	frameworks)^ Course
	(Opportunities)^	Component 3	concept 1 (external business
	Component 4 (Threats)	(Opportunities)^	environment)^ Course
		Component 4 (Threats)^	concept 2 (STEP/PESTL)^
	)	[Recommendations]^	Course concept 3 (internal
		[References]	environment)^ Course
		[References]	concept 4 (Porter's five
			forces)^ Course concept 5
			(identification of internal
			challenges)^
	<b>Y</b>		Recommendations^ Course
	·		concept 6 (stakeholder
			analysis)^ Course concept 7
			(strategic context)^
			Conclusion/ Summary^
,			References
Natasha	Genre: STEP analysis	Genre: STEP analysis	Genre: case study analysis
1,000,0110	Orientation (STEP)^	Orientation (STEP)^	using various course
	Component 1 (Factor 1	Component 1 (Social)^	concepts
	- Social)^	Component 2	-
	Component 2 (Factor 2	(Technological)^	Orientation^ Course concept
	– Technological)^	Component 3	1 (market segmentation)^
			Course concept 2

Compone	ent 3 (Factor 3	(Economic)^	(competitive environment –
– Econon	nic)^	Component 4 (Political)^	Porter's Five Forces,
Compone	ent 4 (Factor 4		STEP) <sup>^</sup> Course concept 3
– Politica	l)^	[Recommendations]	(marketing strategies)^
			Conclusion

As can be seen in Table 6, all three students were at different levels of writing development defined in terms of SWOT or STEP in DA1. Lou and Natasha seemed to have used almost all stages of a SWOT or STEP analysis respectively although Lou used no Orientation and Natasha's text had no Recommendations stage. Amina did not include any mandatory stages of a SWOT analysis and produced a description of the organisation. In DA2, after having gone through the DA procedures in DA1, Lou and Natasha successfully followed the generic stages to write a STEP (Natasha) or SWOT (Lou) analysis learned in DA1. Their texts begin with Orientation followed by all Components of the analysis in the DA assignment. A similar pattern can be observed in their TA even though they needed to use multiple business course concepts and frameworks. In contrast, except the Orientation, Amina's DA2 indicates generic stages that are not appropriate to the case study analysis she conducted as she fails to apply the concepts from the STEP framework that she introduced. These differences between the three students suggest that while Natasha and Lou seemed to have grasped how to write a case study analysis and thus may have transferred this, Amina seemed to be still developing her writing abilities for a case study analysis. Her emerging writing abilities are exemplified through the first three paragraphs of each assignment in Extracts 1, 2 and 3. Author comments follow each paragraph.

#### Extract 1: Amina's DA1

## [SWOT table]

P1 Google is a very well known name for billions of people in the world who use the internet. It is the the<sup>6</sup> most visited search engine in the world. Google has introduced some interesting software's like chrome browser and Gmail and G talk, to 600 million people. Google has made all the information available in seconds on the net. Now a days everyone uses Google for their searches on-line which had made Google the world's no. 1 search engine. [Comment: Description^ (of Google). There is no Orientation to the SWOT analysis.]

In July 2009, Google has announced the launch of new operating system, chrome, which will compete against today's most famous and trustable software company's Microsoft. The operating system which is in competition with chrome will be window 7. Windows are used by 90% of people using the pc's. Some big companies have already installed windows 7 in new laptops and pc's. [Comment: Description There is no link with SWOT.]

Chrome is software, which will be free. This can be very usefull for some hardware comapnies to install and present this software. Google is offering free online office applications which can save a lot space on the hard drive and easy to use. [Comment: Definition? There is no link with SWOT.]

#### Extract 2: Amina's DA2

Nothing is as practical as a good theory (Kurt Lewin, social psychologist, 1945, p.129). There are various ways of thinking about business environment. Each theory helps to understand how business interacts with each other and with environment. Some theories explain the changes in external environment and others focus on how businesses can become successful. One of the theories is a <u>STEP Model</u>, which describes the business environment by focussing on four factors as follows,

- Social
- Technological
- Economic
- Political

I am using one of the factors, social, to describe my organisation.

[Comment: Orientation\ She uses the STEP framework to analyse the business environment.]

Our experience in everyday life shapes our thinking, built our opinions and we make perspective about how we like doing things and things around us. People's perspectives can change according to the environment they live in, for example media plays a big role in making people's mind about things. Especially news media can present a story in a

<sup>&</sup>lt;sup>6</sup> Student spelling or grammatical errors in all student texts are kept as they were.

positive or negative way which affects people views. [Comment: Description^ It is a description of everyday experience shaped by media; not focused and has no direct link with macro-Theme.]

#### Extract 3: Amina's TA extract

#### Introduction

In this report I am analysing the company in which I am working as customer service assistant named as Alliance Boots UK. Boots is a best place to work, according to the criteria we are agreed in our Forum. This criterion is based on our priorities in a work place. We have agreed to six points, we would like to see in our chosen company, as follows; culture, training, money, flexible work, location and rewards and recognition. The role of work I have chosen is a store manager. All the information about the company is taken by the company website and my personnel experience of work there. [Comment: Orientation^ analysis of the company using six criteria given; clearer focus on topic.]

Boots is a leading health and beauty retailer with 115000 plus employees. The aim of the company is to become the world's largest health and beauty retailer and key of business is exceptional customer care. The company is providing products and services by expert and friendly people, to help people look and feel better. [Comment: Description of Boots as a company (background)]

# Culture and environment

The first criteria we agreed on, is a culture and environment of the company. Culture is made BY the company's values and behaviour norms shared by company's members. (Edgar Schein). Culture is a key factor in an organization which affects the law implementation, innovation, job satisfaction, organization success and team building. [Comment: Criterion 1^- sub-heading used]

The other two students, Lou and Natasha, sustained their ability to employ effective generic stages learned in DA1 and DA2 as indicated in their TA. The stages were often marked with sub-headings, particularly in Lou's text (see Extracts 4, 5 and 6 (first two paragraphs) below). Therefore, the particular ability demonstrated by these students can be identified as 'far transfer'.

#### Extract 4: Lou's DA 1

Strengths

Google hopes to capure new clients with their ideas for developing a operating system, which they plan to be faster for the future. The company hopes to produce a system that is smart, agile and successful. Google has developed a system called ANDROID which

has been tailored for netbooks and able to run programmes that can manage displays, handling keyboard and mouse, which is larger but complex piece of software. Google has a strong postition for online advertising, messaging, photo-editing software. Googles chrome Internet browser with the ability in allowing its operating systems to work at a faster paste with other personal computers. [Comment: No Orientation; Component 1 (Strengths)^]

Microsoft has a huge customer service department, on the other hand, google does not and needs to attract a lot more investment in this field. [Comment: Component 2 (Weaknesses)^]

#### Extract 5: Lou's DA 2

Weakness

## Vodafone broadband market SWOT analysis

The following is a SWOT analysis of Vodafone's business environment in relation to the growth of mobile phone usage in the broadband market. The SWOT analysis in this report is taken from different perspectives and three case studies. [Comment: Orientation's; analysis of Vodafone using SWOT]

The first looks at the strengths that the company has and how the business can improve when entering the broadband market. One of their strengths is delivering a strong cash flow and operational performance. Vodafone has a strong link in developing towards global customer relationships, value compared to their competitors. Vodafone has benefited from obtaining variable cost base within fixed operating costs. [Comment: Component 1 (Strengths)]

#### Extract 6: Lou's TA

#### Introduction

The following report is based on M&S retail business and using different concepts and tools from units1-4 of block 3and evidence from (M&S Annual report). An introduction of key success factors, listing the knowledge and management techniques has been mentioned with the view that they help the firm. The use of Political, Economic, Social, Technology, Legal and Environment analysis from part 1 focuses on addressing the developments and challenges that faces M&S and meeting its corporate business capabilities or competencies that are required to deal with a very competitive world. [Comment: Orientation^; analysis of M&S external environment.]

## External analysis

In this section it is important to understand the meaning of external analysis and what it means for the organisation. M&S has different external (far) environments that have strong influence on the business. In most cases the business can not control the different levels or changes that operate so therefore the organisation finds itself in the need to adapt to the best changes physically possible. It is necessary to host several observations techniques and develop a strategic response to any problems arising from these environments. [Comment: Course concept 1 (external environment)<sup>^</sup>; Sub-heading marks a new phase – external analysis; Defines M&S external environment.]

# 6.2 macro-Themes and hyper-Themes

An analysis of macro-Themes and hyper-Themes in the three students' DA and TA texts was carried out to examine both their frequency and features. The results for the macro-Theme showed that all three students wrote a successful macro-Theme as learned in DA1 and demonstrated in their DA2. Nevertheless, their macro-Themes in the TA task were qualitatively different from one another. For instance, Natasha wrote a macro-Theme which did not sufficiently signal the focus of her analysis as shown below in Table 7:

Table 7: Natasha's macro-Themes

Assignment task	Question 2  (20 marks)  Write a report of no more than 2,000 words addressed to an interested investor, justifying your proposed marketing and promotion strategy for launching your new creation. You must also describe the target markets, the competitive environment, potential risks and rewards, your preferred customer communications and promotion options, and how you will access or acquire the resources and capabilities to attract and deliver to your target segments.
Natasha's macro- Theme in her analysis (report)	P1 <sup>7</sup> Marketing strategy is central question in every business. In this strategy the goal is to launch the company with a minimal marketing budget.

Natasha's text was an analysis of the market for the new gardening products and services to be provided by her company. This assignment had two parts and only Part 2 was analysed for this study because Part 1 required a different genre even though it provided the background information for Part 2. Despite the macro-Theme not sufficiently signalling what the analysis was doing, Natasha's business tutor rated her text highly. This may be because Part 1 of her assignment had already set the context and boundary

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<sup>&</sup>lt;sup>7</sup> P1 = Paragraph number in the text.

of the analysis. Therefore, the second sentence in the excerpt above specifies the goal of marketing strategy but it does not include the aspects regarding her marketing strategies considered later in her analysis. In contrast, both Amina and Lou wrote relatively more successful macro-Themes in that they orientated the reader by predicting hyper-Themes in the analysis as exemplified below (see Extracts 4-5 for a comparison):

Lou's macro-Theme

P1 The following report is based on M&S retail business and using different concepts and tools from units1-4 of block 3 and evidence from (M&S Annual report). An introduction of key success factors, listing the knowledge and management techniques has been mentioned with the view that they help the firm. The use of Political, Economic, Social, Technology, Legal and Environment analysis from part 1 focuses on addressing the developments and challenges that faces M&S and meeting its corporate business capabilities or competencies that are required to deal with a very competitive world.

A summary of the results for hyper-Themes is presented in Table 8. As each student wrote their assignment in response to a different TA task, the number of hyper-Themes inevitably varied. The table indicates that except Amina the other two students wrote some or all appropriate hyper-Themes in DAs. A hyper-Theme, normally the beginning sentence of a paragraph, is considered appropriate when it predicts the theme of the paragraph (Ravelli, 2004). The table also shows that the majority (over 60%) of the hyper-Themes were appropriate in each student's TA.

Table 8: Summary of results for hyper-Themes

Students	Number of appropriate hyper-Themes		
	DA1	DA2	TA
Amina	0 out of 5	0 out of 5	15 out of 25
	4 indicated by	4 out of 4 (not so	13 out of 18
Lou	sub-headings	effective)	C
Natasha	2 out of 4	4 out of 4	5 out of 7

In relation to the appropriateness of the hyper-Themes, when they were connected with the macro-Theme in addition to focusing on the Theme of the paragraph, they were classified as appropriate. While some were very effective, some others were less so. For instance, Natasha's DA1 hyper-Theme in Table 9 is indicated by the sub-heading Social factors and the DA2 hyper-Theme clearly links back to the STEP framework and is effective although her hyper-Theme in TA does not explicitly link back to the macro-Theme (i.e., market strategy) and, thus, may not be considered as effective as it should have been. Nonetheless, Natasha seemed to have made an assumption that *market segmentation* is an aspect of *market strategy* already made known to the tutor in Part 1. Therefore, she may not have made the explicit link between the macro-Theme and this hyper-Theme.

Table 9: Natasha's hyper-Themes

DA1	P2 Social factors: People awareness of towards a healthier lifestyle has increased
	in recent years.
DA2	P2 There is one major social factor, which influences the popularity of safer

	syringes.
TA	P2 Segmentation is the identification of the customers within a market who
	demonstrate similar buyer behaviour.

Lou, as shown in Table 10, did not write an effective hyper-Theme in DA1 except the sub-heading. However, she linked the hyper-Themes explicitly with the macro-Theme in both DA2 and TA (i.e., SWOT, and challenges faced by M&S) thereby making them effective hyper-Themes. In fact, her business studies tutor's feedback comment on TA confirms that her structuring of the analysis was effective: 'You structure your report coherently'. It is her application of the business concepts that the tutor considered needed further development which is discussed in the next section.

Table 10: Lou's hyper-Themes

DA1	Strengths Google hopes to capure new clients with their ideas for developing a operating system,
	which they plan to be faster for the future.
	which they plan to be faster for the fature.
DA2	P4 The second looks at the weaknesses for the business.
TA	P3 In this section it is important to understand the meaning of external analysis and
	what it means for the organisation.

In this section, it was shown how the three students construed the textual meaning in writing a case study analysis in DA1 and developed this through to DA2. On the basis of these results, it can be contended that these three students may have transferred their ability to write an appropriate macro-Theme to a new and more challenging assessment context. Likewise, although these three students did not write all the hyper-Themes appropriately, their texts did indicate that they carried over their skills from the previous AL assessment contexts to the new business studies assessment context. As in Cheng's

study (Cheng, 2007), these students may have, at least, developed some genre awareness through the DA process.

#### 6.3 Conceptual development

The students' developing genre knowledge and business studies conceptual knowledge in their assessment texts were examined to evidence learning transfer, drawing on genre studies in SFL and Vygotskian notion of 'scientific concepts' explained in Section 2.2. In particular, the previous section showed that they learned how to write a case study analysis by following suitable generic stages and the macro-Theme in DA1 which they applied to DA2 and continued with their TA except for Amina's DAs. Despite some less appropriate hyper-Themes, these students' knowledge of hyper-Themes was also realised in their TA. In this respect, all three students seemed to have transferred their case study genre knowledge to the TA.

All three students showed the transfer of conceptual knowledge albeit at varying levels. For instance, like the DA assignment, the TA required Lou to apply business concepts and frameworks to the analysis. However, it demanded a wide range of frameworks, including STEP and SWOT. Most importantly, not only did the student have to apply them to the analysis but also evaluate them. Conceptually, such a task was more sophisticated and challenging than those that Lou accomplished for the DAs. However, it may be argued that module materials should have provided her with the required conceptual knowledge<sup>8</sup> for this assignment. It is also worth noting that Lou did not

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<sup>&</sup>lt;sup>8</sup> Yet, module materials themselves as symbolic mediators may not have been sufficient without a human mediator to fully activate her maturing ability vis-à-vis the application and evaluation of the conceptual knowledge in question (Kozulin, 2003).

explicate SWOT sufficiently in paragraph 5 while applying this framework to the analysis of M&S' business environment as shown in Table 11 although she accomplished her DA assignments using this framework successfully:

Table 11: Use of SWOT framework in Lou's TA

Paragraph 5 of TA	Comment	
P5 When it comes to analysing the near environment, it tends to	Lou does not explain why she used the	
look a little closer to the organisation and points out the	SWOT framework to analyse M&S'	
methods in which the business can react to different problems.	external environment. Nor does she	
This is mainly the developments of using the SWOT analysis.	show a clear understanding of the	
This is the strengths that may be hidden within the business,	concepts such as Strengths and	
such as through the skills of talents of employees. The	Weaknesses when writing this	
weaknesses that could spell trouble for the organisation, asking	paragraph.	
questions in how they could improve their position in the retail		
sector, and leading up to the knowledge of improving the	<b>A Y</b>	
business performance compared to the monthly stats in		
particular areas. Due to the weaknesses of the business which		
could lead the organisation open to threats from their rivals and		
therefore taking away competition. What a business regards a		
threat to some may be an opportunity to others.		

In this regard, her ability to apply the SWOT framework might not have fully matured and, consequently, she may not have been able to transfer it to a new assessment context.

In addition to the conceptual knowledge of writing a case study analysis genre, the technicality in the writing of the three students was investigated. Categories of technicality were identified following the process explained in Section 5.1. The categories were drawn on the basis of the requirement of the assignment tasks. A summary of results for technicality (frequency count and %) is shown in Figures 1, 2 and 3. The technicality in Amina's texts in DAs is presented separately for each DA due to the differing business frameworks used.

Figure 1A: Technicality in Amina's DA1 (count & %oftotal technical terms)

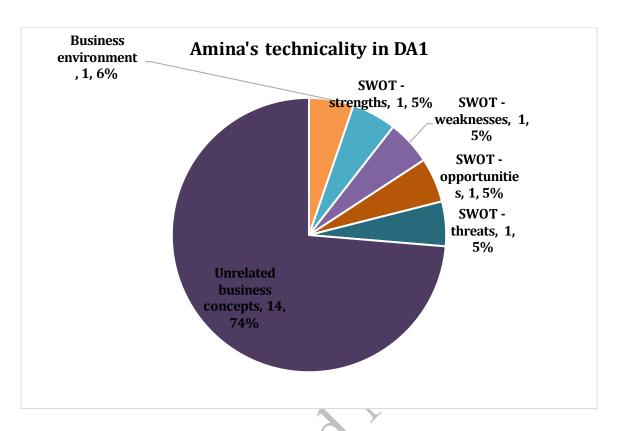


Figure 1B: Technicality in Amina's DA2 (count & %oftotal technical terms)

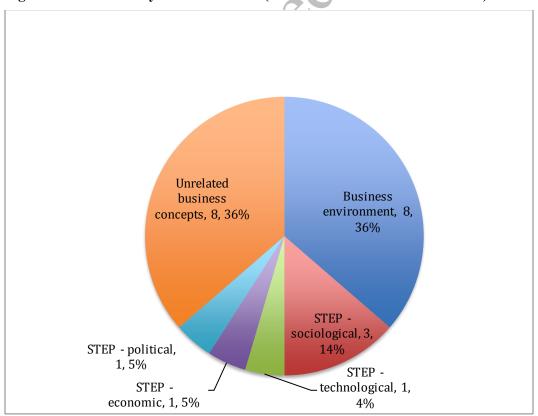


Figure 1C: Technicality in Amina's TA (count & % of total technical terms)

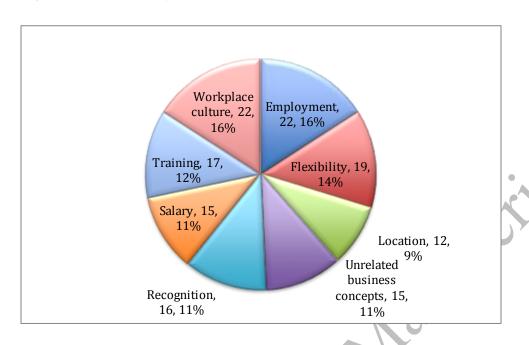


Figure 2A: Technicality in Lou's DA1 & DA2 (count & % of total technical terms)

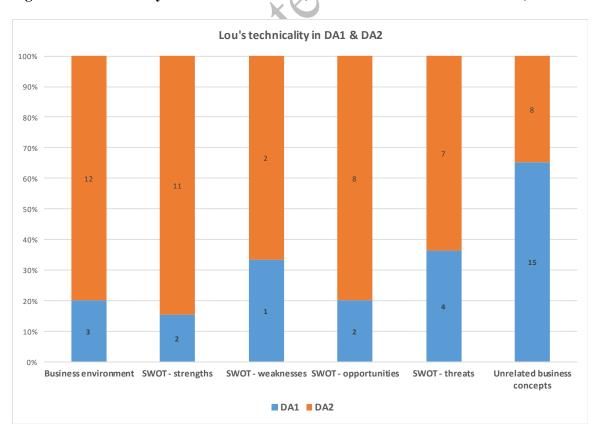


Figure 2B: Technicality in Lou's TA (count & % of total technical terms)

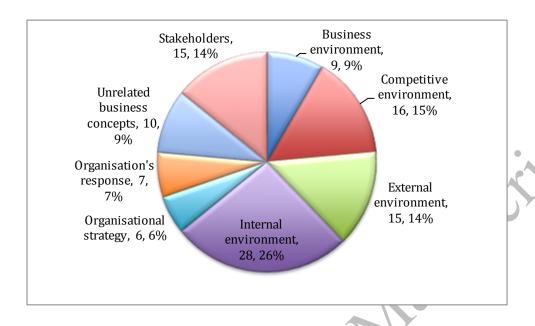
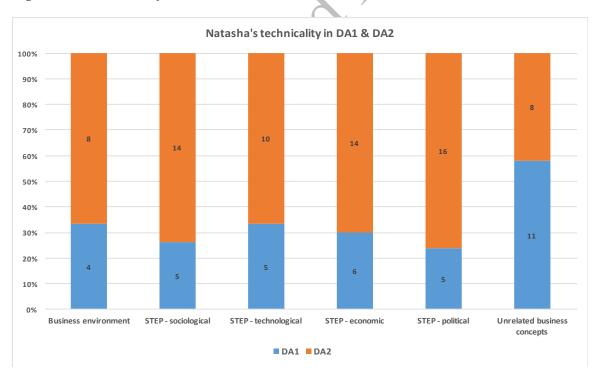


Figure 3A: Technicality in Natasha's DA1 & DA2 (count & % of total technical terms)



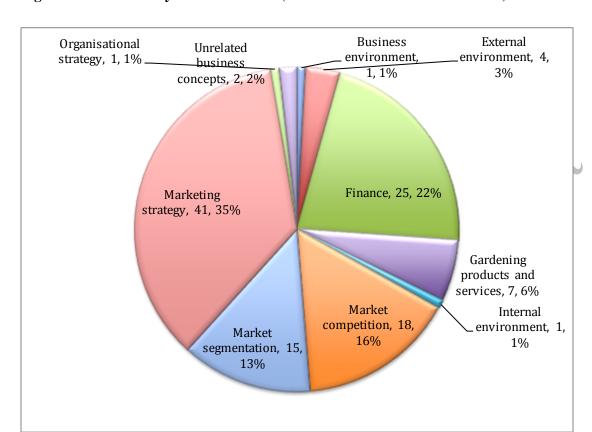


Figure 3B: Technicality in Natasha's TA (count & % of total technical terms)

The figures show that all three students used fewer technical terms in DA1 than in DA2. More importantly, they employed more unrelated technical terms than relevant ones in DA1. However, there are a considerable number of relevant technical terms used in all three students' DA2 and TA although their use in the TA looks higher which is due to the length and conceptually complex nature of TA. Most of the terms used in the TA are different from those in the DA given the nature of the specific assignments and field. For example, in DA2, Natasha used *demographic* and *automation of production* under the categories STEP-sociological and STEP-technological respectively. In her TA, the text included, for instance, *minimal marketing budget* under *Finance* and *market* 

orientation matrix under Marketing strategy. As can be seen in these charts, all three students employed a higher percentage of relevant technical terms in their TA.

The three students, nevertheless, demonstrated different levels of transfer of technical terms meaningfully in their TA as evidenced by the proportion of relevant technical terms they used effectively as summarised in Figure 4 below.

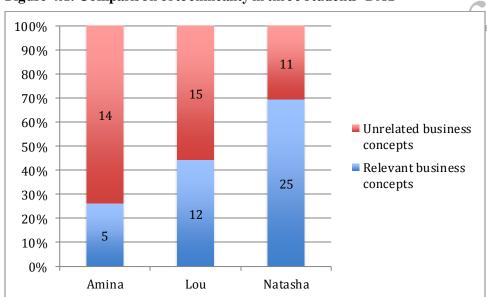


Figure 4A: Comparison of technicality in three students' DA1

Figure 4B: Comparison of technicality in three students' DA2

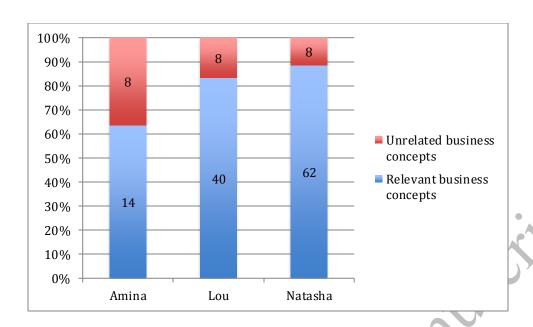
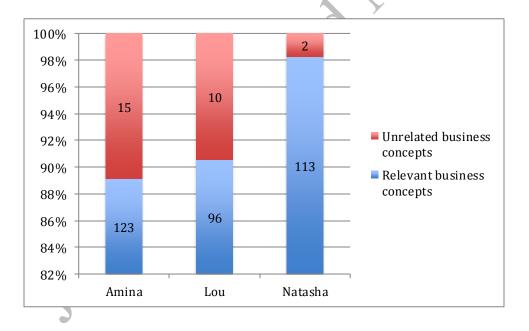


Figure 4C: Comparison of technicality in three students' TA



For instance, Natasha appeared to be the most successful by employing almost only relevant terms in her analysis. The majority (89%) of her terms are represented by four core aspects of her analysis: *marketing strategy, finance, market competition and market segmentation*.

Business tutor comments help shed further light on these students' conceptual development as indicated by their use of technical terms. Natasha appeared to have applied such knowledge effectively to her analysis as confirmed by her business tutor's comments:

Lots of evidence that you've based your thinking on course concepts – good.

You've made extensive use of the course activities.

[...]

Overall, your style and content are coming on very well – very business-like and well reasoned. (my emphasis, Natasha's tutor feedback comments)

On the other hand, both Lou and Amina did not apply the business concepts and theories to their analysis in their TAs as expected by their tutors although their texts contained a significant number of technical terms. This may have been the reason why they did not score high marks on their assignments. Lou's business tutor's comments below clearly suggest this:

Your use of concepts in units 3 and 4 could have been more expansive, e.g.

maybe Grieners theory or the Craig and Douglas reader on globalisation in Unit 4

[...]

Your report did these important conceptual parts of the course to some degree.

(my emphasis, Lou's tutor feedback comments)

Although there may be a variety of reasons for this, a DA approach in assessment in the subsequent module may have revealed further what type of guidance or support these

students needed. In this respect, the students' own views on DA can be insightful which the next section explores.

# 6.4 Learner perspectives on DA

In order to explore the value of DA from the perspective of the learner-writers, each student was interviewed in a semi-structured style. In general all three participants were positive about the DA procedures.

All three repeatedly stated that they achieved greatly through their participation in the DA procedures. They mentioned that the interactive tutor feedback and writing of several drafts enabled them to concentrate on what they needed to develop further. According to Natasha, she was able to develop her skills to write effective paragraphs (hyper-Themes) in case studies which she carried over to her TA:

Particularly beneficial were paragraphing, structure and linking in the text. I am more aware of the linking words and using them to connect sentences. I think about the logical connections more now than I used to. (Natasha, Interview data)

The participants said that DA was "more relaxed" and comfortable, and helped to build their confidence in academic writing unlike traditional methods of assessment which often cause stress and do not explain why they obtained a particular score on their performance. Concepts related to 'affect' (e.g., 'better relationship through personal communication' as noted by Amina) were frequently mentioned by these learners as an important aspect to their learning, which DA, through tutor mediation, possessed. For example, Amina reported, "... because I think this method is more helpful in a way of life, it means it's in a *better relationship*, it helps to understand better. This [DA] had

more *personal communication and interaction*....' (my emphasis). 'Patience' and 'encouragement' as attributes of DA were very frequently alluded to throughout the interview. Natasha, for instance, said 'The tutor had *lots of patience* when I made many mistakes and also *the way the mistakes were pointed out was very helpful* because they were *not shown directly at first but gradually* if I did not notice them' (my emphasis). It is crucial to recognise this affective aspect in order to obtain a complete picture of any pedagogic practices (Daniels, 2007).

When asked how much the tutor mediation enhanced their writing development, the participants reported that the DA procedures were very supportive. For example, Natasha thought the tutor had lots of patience when she made many mistakes and also the way the mistakes were pointed out was very helpful because they were not shown directly at first but gradually if she did not notice them. According to her, "... it is a great way of learning because the guidance questions helped me to think about what I did and how I could improve." These students' such expressions suggest that DA offers an innovative pedagogical approach which may not only make learning an enjoyable experience but also enhance writing development. It should, however, be noted that their views do not necessarily represent direct evidence of transfer.

# 7 Conclusion and implications

The goal of this paper was to explore the value of DA in transferring students' academic writing skills and conceptual knowledge from one AL assessment task to a new context of undergraduate business studies. For this purpose, DA was operationalized as a method of instruction and assessment. SFL genre theory was applied to examine the independent learner performance regarding the case study analysis genre schema, macro-Themes and

hyper-Themes which were identified as problematic in DA1. Additionally, the students' capacity to make ideational meaning was tracked through their DA and TA texts.

Feuerstein's (Feuerstein et al., 2002) notion of 'far transfer' was applied to examine the aforementioned aspects in the student assessment texts.

The findings suggest that DA may contribute to the transfer of learning. In this study, the transfer of using generic stages, macro-Themes and hyper-Themes, and conceptual knowledge of these and business studies concepts appeared to take place in the TA texts albeit differently for each of the three participants. They seemed to be able to transfer genre features, or show their awareness as in Cheng (2007), and conceptual knowledge to their TA although one student, Natasha, appeared to be the most successful. These students' (except Natasha) reconstrual of their conceptual knowledge was not as successful as their academic writing skills (i.e., genre, macro-Themes and hyper-Themes). This suggests that writing and conceptual development is a lengthy process that may benefit from a greater amount of mediation, learner motivation and commitment. Additionally, various other factors may have influenced these students' transfer of learning such as time and business module materials.

This paper contributes to the growing body of AL research that uses SFL and sociocultural theory as frameworks. However, in terms of studies on learning transfer in the field of AL, these two frameworks do not seem to have been employed together despite them being robust tools. Future studies in learning transfer in AL may find them valuable tools.

As this study is limited to three students only, a larger study may be built on this one in order to evaluate DA's contribution to students' ability to transfer genre features and conceptual knowledge to their chosen disciplinary areas. The same methodology used in this study may also be deployed for ESP programme evaluation which seems to be underresearched (Tsou & Chen, 2014).

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# **Appendix**

Example of a DA task (DA2)

# Instructions You are going to read three short case study texts that look at Vodafone's business environment in relation to its broadband market: 'Vodafone expands into broadband' by Katie Allen (a Guardian news report on 10 November 2006) 'Vodafone entering U.K. fixed-line broadband market' by Jo Best (a ii) CNET news report on 11 September 2006) An extract from Vodafone's Annual Report 2009 by Vodafone Group iii) PLC These four articles form a case study of Vodafone's broadband market. These articles examine the business environment of Vodafone's broadband market from different perspectives. Read the three case study texts about Vodafone's broadband market mentioned Task above and write a SWOT analysis of this product based on the articles. Your SWOT analysis should be of about 500 words. Using the SWOT framework, analyse the internal and external environment of this Guidance new operating system by drawing on the three texts. If you wish, you can also refer notes to annual reports by clicking here. As you are using the SWOT framework to analyse Vodafone's business environment based on this case study, look for examples that illustrate the four categories (Strengths, Weaknesses, Opportunities and Threats) in the SWOT framework in order to produce an effective SWOT analysis while you are making notes. It may also be helpful to use a SWOT table for your notes. If you are not sure about what SWOT means, please read the documents (about SWOT analysis) that I sent you for the previous assessment task. You can also ask me for clarification or more information. Please note that you can ask me (the researcher) any questions related to the assessment task during any time of the writing process by email or chat or any appropriate method that allows me to record your queries and my response. We will be using an appropriate online tool (email, wiki or chat) for our interaction while working on your SWOT analysis.