

Assessment of Memorandum Writing in a Quantitative Business Context

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Abstract

This article examines a manageable approach that provides students with significant opportunities to write and improve their writing over time in an introductory quantitative business course. The study examines six elements of written communication skills, as evidenced by assessment data from memorandum assignments administered following pedagogical interventions throughout the semester in an operations management course. Results demonstrate that student performance of audience identification, action-oriented request, and punctuation improved. Interestingly, student performance of grammar slightly decreased. A follow-up analysis indicates that some writing mistakes were related to a lack of proofreading. This article also presents original memorandum assignments and suggestions for improvement.

Keywords

assessment, memorandums, management communication

Employers rank the need for written communication skills highly, yet they frequently note the lack of communication skills in new employees (Knoch, May, Macqueen, Pill, & Storch, 2016; Lim, Lee, Yap, & Ling, 2016). While a business writing course improves student performance early in the business major's sequence (Marcal, Hennessey, Curren, & Roberts, 2005; Riordan, Riordan, & Sullivan, 2000; Zhao & Alexander, 2004), it should be supported by writing assessment in other courses. Despite calls for writing across the curriculum, business faculty have hesitated to add

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writing assessment to their business courses. A limiting factor for the completion of such an assessment could be the time required to assess both content and poor language mechanics (Knoch et al., 2016; Plutsky & Wilson, 2001). While writing may be included in advanced business courses through case studies and capstone projects, it is unclear how much writing has been integrated into survey and introductory quantitative courses, which typically use multiple-choice assessments. The first author sought to develop a manageable approach that would give students significant opportunities to write in an introductory quantitative business course.

Business schools have instituted various responses to support writing across the curriculum, such as establishing writing standards. A critical element of writing standards is a rubric that can be tailored for specific business assignments (Sigmar & Hynes, 2012) and can evolve dynamically based on student performance (Kenworthy & Hrivnak, 2014). Fraser et al. (2005) proposed a detailed business writing rubric that includes audience, content, strategy, literacy, and style. Two of the authors of this article were actively involved in creating their university's writing rubric, which includes criteria similar to Fraser et al.'s rubric: audience, content development, conclusion, and mechanics of language. Rubrics help students understand expectations so they can better evaluate their own writing (Young & Murphy, 2003). Also, rubrics provide a standardized, transparent yardstick by which, over time, to measure workforce-ready skills such as business writing (Riebe & Jackson, 2014).

Another response to support writing across the curriculum involves providing access to institutional writing resources. University writing centers support individual faculty efforts through grammar tutoring and paper readings (Ashbaugh, 1994; Plutsky & Wilson, 2001). Paper readings provide a significant opportunity for students to meet with a peer who is specifically equipped to give helpful writing feedback not only for grammar, punctuation, and spelling but also about the intended audience, content development, and conclusion.

One other response includes the addition of short writing assignments in upper-level business courses. Faculty view shorter writing assignments as more manageable to integrate into business courses (Plutsky & Wilson, 2001). Employers regard writing the short professional memorandum as an important skill for employees (Knoch et al., 2016; Lim et al., 2016). Faculty have reported successful integration of the memorandum in accounting, finance, and management science courses (Carrithers & Bean, 2008; Gabriel & Hirsh, 1992; Williams, Stanny, Reid, Hill, & Rosa, 2015). However, Carrithers and Bean (2008) and Williams et al. (2015) reported only summative measures of student performance for memorandum writing.

Problem Statement and Central Research Question

Despite students' need for business writing skills, many business faculty do not emphasize and assess their students' business writing. Students in introductory quantitative business courses lack writing skills for the elements of audience identification, problem statement, request formulation, and mechanics. A gap in the literature is a *manageable approach* for faculty to incorporate writing and assessment results. There

is a lack of manageable interventions that have been assessed and shown to contribute improvements to writing in survey and introductory quantitative business courses. Typical multiple-choice assessments of decision tool calculations do not offer students writing practice and feedback. While integrating writing standards, university writing center resources, and short writing assignments is a common sense approach, the novelty in this study is that these approaches are applied and assessed to include writing feedback in an introductory operations management course. Given the concerns employers have about new employee writing and the constraints that faculty face assessing student writing, it is important to develop a manageable assessment approach with activities to improve writing over time. This study examined the following central research question: What trends exist in students' writing performance over time given a manageable intervention approach in a quantitative business course?

Overview of Manageable Intervention Approach

The first author implemented several pedagogical interventions in an introductory operations management course that is part of the core requirements across undergraduate business degrees at the author's institution. Before the midpoint of the semester, the first author educated students on typical professional communication expectations. The primary expectation, in this case, was the short business memorandum. We adapted the university's official written communication rubric (intended for all disciplines) to fit within the quantitative business environment. For the audience element, we asked students to identify an appropriate recipient. For the content element, we asked students to write a brief operations management problem statement. For the conclusion element, we asked students to write an action-oriented request concerning the operations management problem. For the language mechanics, we asked students to write with excellent grammar, punctuation, and spelling.

Our university writing center provided feedback to students on their grammar and punctuation skills at the beginning of the course. Also, the university writing center offered multiple 1-hour tutoring class sessions on grammar and punctuation topics as well as individual peer paper readings by appointment.

In multiple instances, students wrote a memorandum in class, and memorandum elements were identified. Because we selected the memorandum format, the business writing assignments were typically less than one half page. Thus, the assignments were manageable to assess by the instructor at multiple intervals in a quantitative business course.

Method

Overview

We conducted our study at an Association to Advance Collegiate Schools of Business accredited college of business at a state university with approximately 13,000 students. Participants in this study were consenting students who enrolled in one of the two

sections of a core quantitative business course in operations management, which was taught by the first author during the fall 2016 semester. The institutional review board of the authors' university approved the study. On the first day of class, students received invitations and informed consent forms to sign and return if they wanted to volunteer to be part of the study. Of the 89 students enrolled in the two sections, 83 consented to be part of the study. Of the 83 consenting students, the participant sample consisted of 57 students who completed three in-class memorandum writing assessments.

Chi-square tests on enrollment population for classification and gender demographics indicated that it was appropriate to combine the two sections into one data set. Chi-square tests also indicated that the participant population was representative of the enrolled population. For the participant group, the categories for year classification included 23% senior, 58% junior, and 19% other, which included sophomores and non-degree-seeking students. In the participant group, 51% were female, and 49% were male.

Assessment Intervals and Test Instruments

The first author created test instruments and assessed student memorandum writing at multiple points, beginning with a baseline assessment at the start of the semester. The midpoint and end-of-semester assessments occurred after students reviewed the writing standards, received university writing center feedback, and participated in short writing exercises and class discussions.

The assessments evaluated the extent to which students could accurately identify the audience, state an operations problem, write an appropriate action-oriented request, and use correct mechanics of language. The first author created the three test instruments for the beginning, midpoint, and end of the semester with the same structure. Each instrument required students to read a business scenario memorandum with a data table, create a histogram on the grid provided, and write a response memorandum by filling in the salutation with an appropriate recipient and the body with a problem statement and an action-oriented request, while using excellent writing mechanics.

Procedure

The study included three assessments during the semester. For each assessment, the instructor gave students a memorandum template and asked students to complete the salutation and write the body by stating the problem and recommending an action-oriented request. At the beginning of the first lecture, the instructor conducted the baseline assessment using the first test instrument, shown in Figure 1.

The first test instrument consisted of a memorandum from the customer service manager with customer feedback on broken packaging for a fictitious company that produced Mighty Muffins. Each memorandum included a grid in which the students were asked to create a histogram with the data provided in Figures 1, 2, or 3. Figure 4 shows the template for the first test instrument. The first author provided a similar template for the second and third test instruments shown in Figures 2 and 3.

Mighty Muffins Memo 1
 TO: Operations Manager (OM)
 FROM: Xiuli Lu, Customer Service Manager
 RE: Customer feedback for week 1 (Aug 14 – Aug 20) for Mighty Muffins

Per your request, I reviewed the customer feedback from our website for the new 8-ounce Mighty Muffins that were introduced in two cities August 14 – August 20. Since 80% of the complaints were related to broken packaging, I created a table for the number of customer complaints related to broken packaging per day.

Day	Number broken
1	20
2	20
3	20
4	30
5	40
6	50
7	60

Figure 1. Baseline test instrument for the beginning of the semester assessment of student memorandum writing.

Cool Cases Memo 1
 TO: Operations Manager (OM)
 FROM: Pablo Rios, Smartphone Case Supervisor
 RE: Case length

The 6-inch case must fit over 6-inch smartphones. However, the case lengths we received this morning from Supervisor Saffron Smith’s manufacturing line are listed in the table.

Smartphone case length (inches)	Frequency
5.5	200
5.6	300
5.7	600
5.8	300
5.9	0

Figure 2. The midpoint assessment test instrument for student memorandum writing.

Pumpkin Pies Memo 1
 TO: Operations Manager (OM)
 FROM: Qin Zhang, Customer Service Manager
 RE: Week 3 customer feedback for Pumpkin Pies

Per your request, I reviewed the customer feedback on our website for pumpkin pies during week 3. Since 90% of the complaints were related to burnt pies, I created a table for the number of customer complaints related to burnt pumpkin pies per day.

Day	No. of burnt pumpkin pie complaints/day
1	30
2	40
3	40
4	60
5	70
6	70
7	90

Figure 3. The end-of-semester test instrument for assessment of student memorandum writing.

The first author then evaluated the students’ work for the six standard writing elements described earlier: audience, problem statement, request, grammar, punctuation, and spelling. The assessment rubric was originally constructed on a 3-point scale (0 = *does not meet expectations*, 1 = *meets expectation*, 2 = *exceeds expectations*). Over time, the nature of the short memorandum assignment and the instructor’s desire to identify patterns in students’ inability to meet expectations evolved the rubric into a 2-point scale (0 = *does not meet expectations*, 1 = *meets or exceeds expectations*). Omission of or inclusion of an incorrect recipient, problem statement, or request failed to meet expectations, while a complete and correct recipient, problem statement, or request met and/or exceeded expectations. The first author also wrote standard writing

To demonstrate how the rubric was applied, we discuss the baseline assessment memorandum at the beginning of the semester for a participant we will call Sam. In Sam's baseline assessment memorandum (refer to Figures 1 and 4), Sam incorrectly addressed his or her memorandum back to the customer service manager, implying that the customer service manager should investigate the source of the increase in broken packages. Furthermore, Sam used repetitive sentences to describe the problem, omitted a specific request for action, and made several grammar and punctuation mistakes. The first author wrote multiple writing codes on Sam's memorandum (below) and evaluated it as *does not meet expectations* for five of the elements and *meets expectations* for the problem statement.

The Histogram show a steady increase of broken packages starting on day 4. There were 20 broken packages on day 1. There were 20 broken packages on day 2. There were 20 broken packages on day 3. There was an increase in broken packages to 30, on day 4. Number of broken packages are increasing. There was an increase in broken packages to 40, on day 5. There was an increase in broken packages to 50, on day 6. There was an increase in broken packages to 60, on day 7. We need to investigate why there is a increase in the number of broken packages within the last few days.

After the students wrote the baseline memorandums (refer to Figures 1 and 4), in the first lecture the instructor began introducing the interventions by leading an active writing exercise for a productivity improvement problem. The exercise began with a memorandum seeking productivity improvements and a list of writing standards. The instructor reviewed the six elements of the writing standards: audience, problem statement, action-oriented request, grammar, punctuation, and spelling. The instructor guided class discussion by asking students to identify the recipient, the problem statement, and the request in the first memorandum example. Then, students practiced writing their own memorandums per the six memorandum elements. Following the student writing practice, the instructor led class discussion by asking students to identify the recipient, the problem statement, and the request in additional examples of memorandums. One of the elements emphasized was audience, since students may need extra guidance to identify and understand the role of audience in their business writing (Carrithers, Ling, & Bean, 2008; Fraser et al., 2005; Kogen, 1983; Roberts, 1989). Students were advised to evaluate the appropriateness of the request for the corresponding recipient.

In addition to the test instruments shown in Figures 1 to 4, the first author applied standard writing mistake codes to nine weekly, 10-minute quizzes to provide specific and frequent feedback to students about grammar, punctuation, and spelling mistakes. The quiz writing requirements were typically one to three sentences. This frequent instructor feedback on writing follows the high-impact practices advocated by Kuh (2008) and Kuh and O'Donnell (2013).

The first author gave students several options to improve their writing outside the classroom. During the first week of class, the university writing center conducted an online grammar and punctuation assessment of each student. A representative from the

university writing center visited the second class meeting of the semester to describe the writing resources available on campus. Resources included paper reading services, tutoring sessions, and the center's website. Students were encouraged to schedule a paper reading with the university writing center in order to improve their memorandum writing. The first writing exercise also provided students with two opportunities to meet with a peer outside class. Students were provided a form to identify strengths and weaknesses based on the six standard student learning outcomes of audience, problem, request, grammar, punctuation, and spelling. This form was used to guide their peer meeting. Students were then given two opportunities to revise and resubmit their memorandums. The students received instructor feedback on the final revision.

Before the midpoint assessment, the first author led a second in-class writing exercise based on a quality management problem. Again, the students read memorandums for an operations management problem, practiced writing an inquiry memorandum, and discussed the audience, problem statement, and request memorandum elements. At the midpoint in the semester, the test instrument (Figure 2) consisted of a memorandum from a smartphone case shipping supervisor with a table indicating the number of incorrectly sized smartphone cases received in shipping. After students completed and received their midpoint assessments, the instructor reviewed the results with students and reviewed the writing standards.

Following the same format, the final assessment at the end of the semester (Figure 3) consisted of a memorandum from the customer service manager with customer feedback data on burnt pumpkin pies. To illustrate the progress of the participant labeled earlier as Sam, we present Sam's final memorandum assessment (refer to Figure 3). Sam addressed his or her memorandum to the baker manager, described the problem briefly, and specifically requested that the baking process and equipment be examined. In the memorandum that follows, Sam was evaluated as *does not meet expectations* for only the grammar and punctuation elements and *meets or exceeds expectations* for the remaining four elements.

The Histogram shows that each day has a greater number of burnt pumpkin pie complaints. After reviewing the customer feedback on our website for pumpkin pies, the number one complaint was for burnt pie. Every day there are a greater number of burnt pies being made. I need you to make sure that the chefs making the pies are baking them correctly and that the equipment being used to make the pies are in working condition.

Sam's writing samples demonstrated several typical trends that are seen in the analysis of the overall participants' results. Next, we summarize and discuss the assessment of all the participants' memorandum writing performance for the three instruments shown in Figures 1 to 4.

Results and Discussion

To determine what trends exist in students' writing performance over time, we graphed the six memorandum elements for the beginning of the semester baseline, midpoint, and end-of-semester assessments in Figures 5 and 6. Figure 5 illustrates that by the end

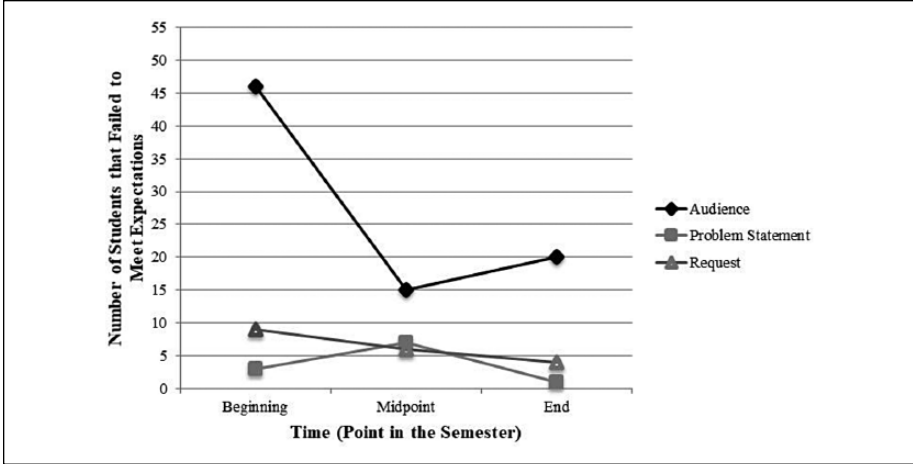


Figure 5. Content assessment of the participant responses that failed to meet expectations for each of the three assessments for operations management participants in fall 2016.

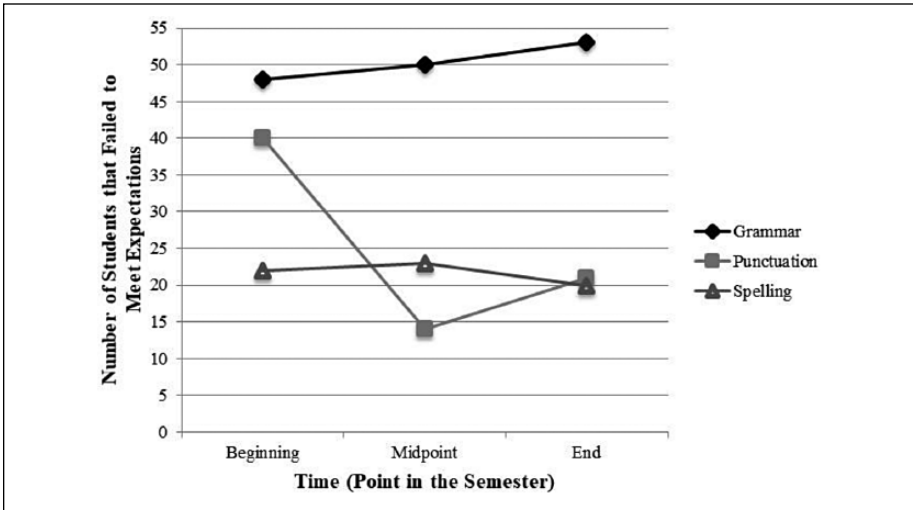


Figure 6. Mechanics assessment of the participant responses that failed to meet expectations for each of the three assessments for operations management participants in fall 2016.

of the semester, the number of *does not meet expectations* decreased in content-related writing elements of audience, problem statement, and request. Figure 6 illustrates that while the number of *does not meet expectations* in participants' use of punctuation significantly decreased over the semester, spelling remained rather static, and grammar slightly increased.

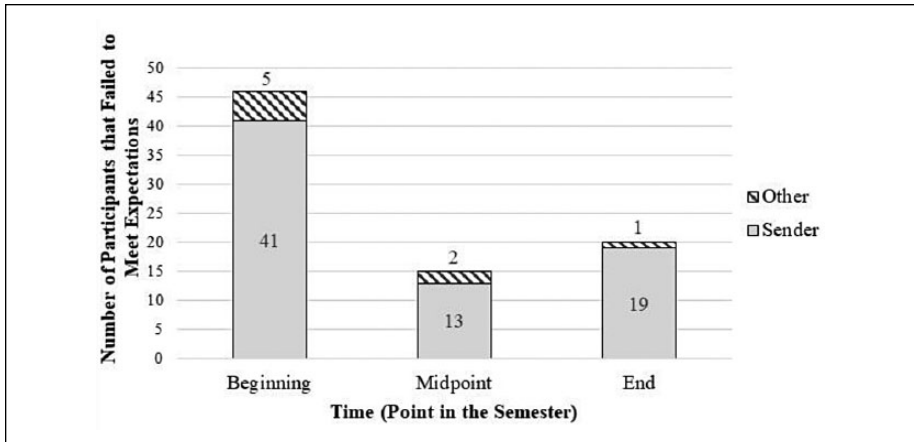


Figure 7. Participant audience responses that failed to meet expectations for each of the three assessments for operations management participants in fall 2016.

Further analysis of Figures 5 and 6 shows that from the beginning of the semester to the midpoint of the semester, the number of participants who failed to meet expectations decreased for three of the six memorandum elements: audience, action-oriented request, and punctuation. These results support an improvement trend for the interventions introduced. Conversely, participant performance failed to improve for the other three memorandum elements: problem, grammar, and spelling. One possible explanation for the lack of improvement in problem statement was the ceiling effect, since 54 of the 57 participants already met or exceeded expectations for this element at the beginning of the semester. In contrast, fewer than 10 participants met or exceeded expectations for grammar over the semester.

Figures 5 and 6 analyses revealed that, from the midpoint to the end of the semester, the number of participants who showed improvement increased for the memorandum elements of problem, request, and spelling. These results also support an improvement trend for the interventions introduced. For the other three memorandum elements—audience, grammar, and punctuation—participant performance failed to improve. A possible explanation for the lack of improvement at the end of the semester is that student attendance was lower than in the preceding weeks.

For the content-related elements, we analyzed the results further for participants who failed to meet expectations. We graphed a summary of the participant audience responses that failed to meet expectations (see Figure 7). Most participants who incorrectly identified their audience requested that the sender (e.g., customer service manager or smartphone case supervisor) fix the problem, while several students incorrectly requested that an executive fix the problem. Many participants initially failed to recognize that the sender was simply a messenger, and not an applicable team member to investigate and solve the problem. Figure 5 illustrates that the recipient selection mistakes shown in Figure 7 decreased significantly after the interventions were introduced.

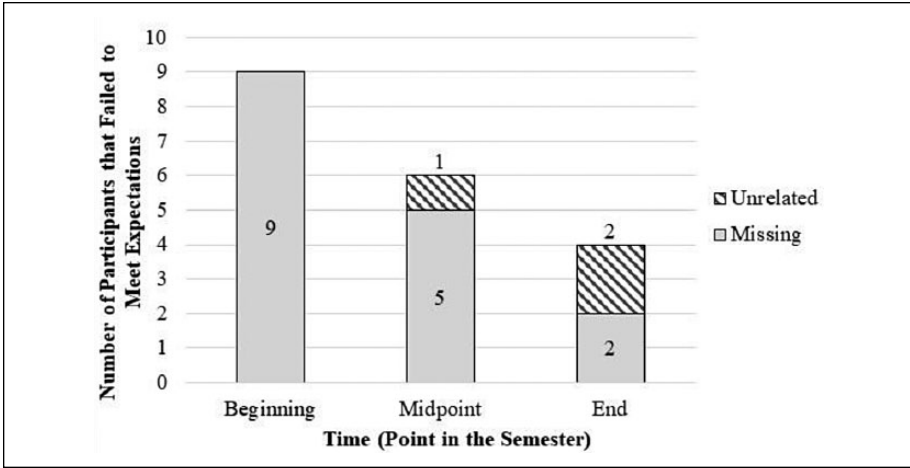


Figure 8. Participant request responses that failed to meet expectations for each of the three assessments for operations management participants in fall 2016.

Because participant performance was fairly strong for problem identification, we did not graph these results. Only 2% to 12% of students failed to meet expectations for stating the problem over the semester. A summary of the participant requests that failed to meet expectations is graphed in Figure 8. Most participants who failed to meet expectations did not state an action-oriented request, while a few made requests of their audience that were unrelated to the problem they identified. Figure 5 also illustrates that the omissions and unrelated requests decreased after the interventions were introduced.

We also conducted an additional assessment of writing mechanics for each of the three test instruments. The most common writing mistake codes were “something missing,” “punctuation error,” “spelling error,” and “awkward sentence structure.” These types of mistakes indicated that the participants failed to proof-read their work carefully. After the initial interventions were introduced, punctuation mistakes decreased, as shown in Figure 6.

Summary

This study contributes to research and practice for writing across the business curriculum in several ways. We introduced a manageable assessment approach that can be administered multiple times throughout a course. Previous studies (e.g., Carrithers & Bean, 2008; Gabriel & Hirsh, 1992; Williams et al., 2015) either did not report assessment results or reported only summative measures. This study presented results from three time periods, two of which occurred after the interventions were introduced. Our interventions included writing standards, which we adapted from a general writing rubric developed by our university into the quantitative business environment. The university developed its rubric as part of its Quality Enhancement Plan. The rubric was

designed for use by all departments. We adapted the rubric to the business environment and contextualized the concepts of audience, content, conclusion, and mechanics. We also promoted the use of university writing resources and created short writing assignments with instructor and peer feedback to improve students' overall writing quality.

We highlighted the potential gains in the areas of identifying an appropriate audience, writing an action-oriented request, writing a problem statement, and using correct punctuation. These intervention strategies were practical for the first author to implement in multiple sections of a course with 89 students in the fall of 2016.

Our results indicate that from the beginning of the semester to the midpoint of the semester, participant performance tended to improve for audience, action-oriented request, and punctuation, as shown in Figures 5 and 6. Figures 5 and 7 show a dramatic decrease in the number of participants who incorrectly selected a recipient for the audience element from the beginning to the midpoint assessment. Figures 5 and 8 illustrate a steady decrease from the beginning, to the midpoint, to the end of the semester assessment in the number of participants who failed to write a clear request or who wrote an unrelated request. Our results indicate that the class discussion of the rubric, use of active learning exercises and class memorandum examples, and instructor and peer feedback on participant memorandum writing increased the number of participants who could identify an appropriate recipient for the problem statement and write a related action-oriented request. Similarly, the emphasis on punctuation in repeated instructor feedback and by university writing center resources may have helped participants pay more attention to their punctuation as they wrote business memoranda.

Unfortunately, a similar emphasis on grammar throughout the semester did not increase the number of participants who met expectations for grammar at the end of the semester. In the first half of the semester, more than 75% of the participants met with a peer of their choice to identify their memorandum strengths and weaknesses and subsequently revise an in-class memorandum exercise. However, only 14% of the participants who met with a peer chose a university writing center peer at least once during the semester. Since less than 20% of the participants met expectations for grammar (see Figure 6), it is likely that participants may have selected peers lacking in grammar skills. Our future plans include encouraging students to select trained university writing center peers and creating a more extensive template that would require peer reviewers to assess specific writing elements.

Our study points to several significant opportunities. Our experiences suggest that instructors across the business curriculum should review writing standards in their classes initially and integrate them throughout the semester with business scenarios relevant to the class focus. Instructors may also encourage students to use university writing center resources, such as online grammar and punctuation assessments and paper readings that may include the assessment of not only writing mechanics but also the content elements related to audience, problem statement, and clear request. Because in all three assessments many participants had writing code(s) related to missing words, our results support short writing assignments in class along with advising students to proofread their work carefully.

Efforts to introduce writing across the curriculum may be the best way to influence writing skill development. Assessing student performance on audience, content, conclusion, grammar, punctuation, and spelling in quantitative business classes reinforces these competencies in the context of business problem-solving. In fact, the test instruments we created with business memoranda, shown in Figures 1 to 4, could be used in a variety of different business courses, including business writing courses. Adapting a more general writing rubric for business writing, encouraging business students to use university writing resources, and assessing business student writing with brief memoranda are manageable strategies for a quantitative upper-level business course.

Authors' Note

This study was approved by the Institutional Review Board of the University of West Florida (Approval No. 2014-009). The student examples are reproduced by permission.

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