

UNIVERSIDAD DE COSTA RICA
SISTEMA DE ESTUDIOS DE POSGRADO

EVALUATING THE EFFECTIVENESS OF AN ESP COURSE FOR BUSINESS
ADMINISTRATION STUDENTS

Trabajo final de investigación aplicada sometido a la consideración de la Comisión del Programa de Estudios de Posgrado en Enseñanza del Inglés como Lengua Extranjera para optar al grado y título de Maestría Profesional en Enseñanza del Inglés como Lengua Extranjera

ANDRICK FERNANDO ARGUEDAS HIDALGO

LUIS PABLO CERVANTES SANABRIA

LIDIA MERCEDES GÓMEZ ROJAS

Ciudad Universitaria Rodrigo Facio, Costa Rica

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Dedicatoria

Teachers have three loves: love of learning, love of learners, and the love of bringing the first two loves together.

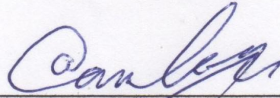
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To our professor Mayra Solís, for her selfless support throughout this process.

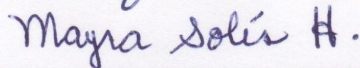
Agradecimientos

We want to thank all the people that were part of this meaningful learning process. This project would not have been possible without the support of our families, professors, and students.

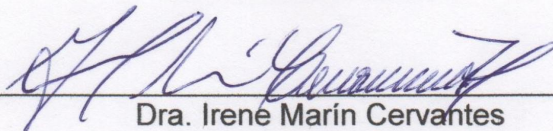
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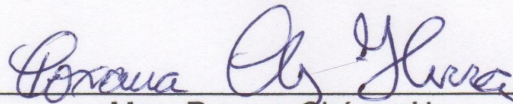
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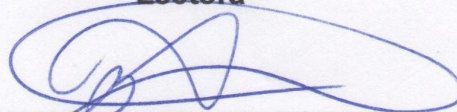
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Profesora Guía



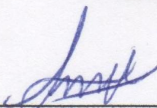
Dra. Irene Marín Cervantes
Lectora



Mag. Roxana Chévez Herra
Lectora



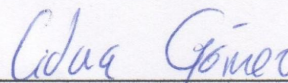
M.A. Xinia Rodríguez Ramírez
Directora Programa de Posgrado en Enseñanza del Inglés como Lengua Extranjera



Andrick Fernando Arguedas Hidalgo
Sustentante



Luis Pablo Cervantes Sanabria
Sustentante



Lidia Mercedes Gómez Rojas
Sustentante

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RESUMEN

El propósito de esta investigación fue explorar la efectividad de un curso de Inglés para Propósitos Específicos (ESP) para estudiantes de Administración de Empresas. Los estudiantes del programa de Maestría en Enseñanza del Inglés como Lengua Extranjera diseñaron este curso como un proyecto de graduación con el propósito de mejorar el dominio del inglés de los estudiantes en su campo profesional. El diseño del curso se basó en un estudio exhaustivo de las necesidades, deseos y carencias de esta población específica y siguió un enfoque de TBLT (Enseñanza del lenguaje basada en tareas). Además, los factores considerados para evaluar la efectividad del curso fueron el logro exitoso de metas y objetivos y las actitudes de los estudiantes hacia la relevancia de los contenidos del curso. Se implementaron métodos mixtos para medir los resultados, tales como observaciones, rúbricas analíticas, encuestas a los estudiantes y grupos focales. Los resultados muestran que el curso fue efectivo en gran medida porque los estudiantes cumplieron con las expectativas de desempeño en todas las tareas principales. Además, los estudiantes calificaron favorablemente el curso en términos de su relevancia para sus campos profesionales.

Palabras clave: Evaluación del curso, efectividad del curso, ESP, Administración de empresas, logro exitoso de metas y objetivos, actitudes de los estudiantes, TBLT.

RESUMEN EN INGLÉS

The purpose of this investigation was to explore the effectiveness of an English for Specific Purpose (ESP) course for Business Administration students. Students of the Master's program in Teaching English as a Foreign Language designed this course as a graduation project with the purpose of improving students' English proficiency in their professional field. The design was based on a thorough study of this specific population's needs, wants, and lacks and followed the Task-Based Language Teaching (TBLT). Moreover, the successful achievement of goals and objectives and the students' attitudes towards the relevance of the course contents were the factors considered to evaluate the effectiveness of the course. Mixed methods were implemented to measure results such as teacher observations, analytic rubrics, student surveys, and focus groups. The results show that the course was effective to a great extent because the students met performance expectations in all main tasks. Additionally, the students rated the course favorably in terms of its relevance to their professional fields.

Keywords: Course evaluation, course effectiveness, ESP, Business Administration, successful achievement of goals and objectives, student's attitudes, TBLT.

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Lista de abreviaturas

A: Assistant
EAP: English for Academic Purposes
EBA: English for Business Administration
EOP: Occupational Purposes
ESP: English for specific purposes
HR: Human Resources
L: Listening
NA: needs analysis
R: Reading
S: Speaking
Ss: Student
T: Teacher
TBLA: Task Based Language Assessment
TBLT: Task-Based Language Teaching
TEC: Instituto Tecnológico de Costa Rica
TEFL: Teaching English as a foreign language
UCR: University of Costa Rica
W: Writing



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INFORMACIÓN DEL ESTUDIANTE:

Nombre Completo: Andrick Fernando Arguedas Hidalgo

Número de Carné: B89517 Número de cédula: 1-1619-0537

Correo Electrónico: andrick2509@gmail.com

Fecha: 13/05/2021 Número de teléfono: 87444924

Nombre del Director (a) de Tesis o Tutor (a): M.A. Xinia Rodríguez Ramírez

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INFORMACIÓN DEL ESTUDIANTE:

Nombre Completo: Luis Pablo Cervantes Sanabria

Número de Carné: B01618 Número de cédula: 304670834

Correo Electrónico: luispabloe@hotmail.com

Fecha: 13/05/2021 Número de teléfono: 72088791

Nombre del Director (a) de Tesis o Tutor (a): M.A. Xinia Rodriguez Ramirez

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INFORMACIÓN DEL ESTUDIANTE:

Nombre Completo: Lidia Mercedes Gómez Rojas

Número de Carné: B12838 Número de cédula: 304580166

Correo Electrónico: lidia.gmz71@gmail.com

Fecha: 13/05/2021 Número de teléfono: 83097551

Nombre del Director (a) de Tesis o Tutor (a): M.A. Xinia Rodríguez Ramírez

Lidia Gómez

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As a final graduation project, the University of Costa Rica (UCR) Master's program in Teaching English as a Second Language requires that their student teachers design and teach an English for Specific Purposes (ESP) course for a given population. In our specific case, we were assigned a group of 23 students from the Business Administration School at the UCR. The first step we took was to carry out a needs analysis (NA) to identify the target students' immediate and delayed English language needs which require fulfillment for both Academic Purposes (EAP) and Occupational Purposes (EOP). Second, we used the results from that analysis-to design an appropriate syllabus for the course. This course design report presents the needs analysis, the course syllabus, two sample lesson plans and their corresponding materials, and some of the instruments that we are going to use to assess the effectiveness of the course and students' performance.

Globally, it is agreed that English is the language of business, which makes the need of performing certain tasks in English more relevant than ever. As stated by Neeley T. (2014, para. 9), "the need to tightly coordinate tasks and work with customers and partners worldwide has accelerated the move toward English as the official language of business no matter where companies are headquartered." She explains that the main reasons for English to become the official language of business are competitive pressure, globalization of tasks and resources, and acquisition integration across national boundaries. In this sense, business people are expected to be able to communicate with customers, suppliers, stakeholders, and other business partners in English. This report will thoroughly discuss the design of an English for Specific Purposes course for Business Administration students that will enable them to utilize the English language effectively in their professional lives.

Chapter 1: Needs Analysis

Having clarity over the needs of a specific population of students will contribute to a more effective learning process. Additionally, it will enable a better selection of activities, materials, and evaluations according to the students' specific language needs. This is the reason why a needs analysis was conducted for the target population. This section discusses methodology, procedures, instruments, general description of the institution, positions students might have at work, the interest of primary stakeholders, group profile, and results and discussion of the needs analysis.

Methodology

Mixed methods were used in this needs analysis. As defined by Creswell et al. (2003), "mixed methods involve combining ... qualitative and quantitative research and data in a research study. Qualitative data tends to be open-ended without predetermined responses while quantitative data usually includes closed-ended responses such as found on questionnaires or psychological instruments" (p. 14). The questionnaires completed by the participants generated data to frame needs and context. Additionally, the use of interviews with stakeholders and business administration students provided student teachers with qualitative data that bridged gaps and expanded on most salient data coming from the questionnaires. The fact that the administration of these instruments happened around the same moment makes this research method the *convergent parallel* type. Creswell et al. explained that "in this design, the investigator typically collects both forms of data at roughly the same time and then integrates the information in the interpretation of the overall results. Contradictions or incongruent findings are explained or further probed in this design" (p. 15). With this method, student teachers obtained reliable information that was used to elaborate an accurate needs analysis.

Procedures

For this needs analysis, the first step taken was to consult articles and research papers, as well as course guides and university websites to obtain information on the profile of business administrators and the role of English in this field. Based on these data, a stakeholders' questionnaire was designed. This questionnaire was answered by 22 stakeholders including 12 undergraduate and nine graduate business administration students. After combining the processed information from the stakeholders' questionnaire, the students' questionnaire 1 was prepared. This instrument asked for information on tasks they were likely to perform in their future careers, the context of these tasks, and their frequency. Based on these results, the students' questionnaire 2 was designed and sent to a list of 50 students (28 business administration students and 22 public accounting students). One week after the questionnaire was sent, there were 23 responses from the students who were interested in taking the course. Since the main questionnaire was lengthy, the student teachers agreed to address areas such as learning styles and attitudes towards English in a different instrument. All questionnaires were completed via Google Forms, as it was not possible to provide them with a printed version due to Covid-19 sanitary practices and social distancing. For these same reasons, the student teachers were not able to administer a diagnostic test to determine the target population's language proficiency levels.

After studying the responses from these three questionnaires, an interview for students was designed to expand on the understanding of the population's specific target needs and situations. Due to time constraints and students' limited availability, the student teachers were able to interview one student via Zoom, a virtual meeting solution software. This interview clarified important aspects to carry out the needs analysis such as specific information about the context, people, and topics related to the identified tasks. At this point, the contact person in the School of Business Administration of the UCR responded

to an email previously sent to her. As a result, student teachers designed and conducted an interview. This interview served to validate and consolidate the data collected throughout the project. Finally, triangulation was used to validate the collected data and carry out this needs analysis.

Instruments

Following Jordan's (1997) suggestions on needs analysis, varied sources were consulted using multiple data collection methods to ensure a better understanding of the target population and their language needs. The instruments were designed in Spanish to ensure that the participants understood every item and instructions in the questionnaires. The items were both closed-ended and open-ended. While closed-ended questions such as multiple-choice items are easier for participants to answer, "open-format items can provide a far greater richness than fully quantitative data" (Dörnyei, 2007, p. 107). Respondents were able to provide information on relevant aspects that the student teachers had not considered. Additionally, open-ended questions helped leverage the learners' expertise in the area. Nonetheless, closed-ended questions were also used in varied sections to make the questionnaire format more appealing.

Stakeholders' Questionnaire

The first instrument administered was the stakeholders' questionnaire (see Appendix A). It was designed with the purpose to gather information about the use of English in the field of business administration. The first section aimed to determine the positions that students of this field may have in the future and the necessity of using English in those contexts. In the second section, stakeholders were asked to provide information on their academic experience in the field in terms of how much they need and use English. Additionally, they indicated which specific areas of the field required the use of English. While completing section three, stakeholders were expected to describe the

frequency in which they need to use the different language skills at work, specific situations in which English is necessary, language difficulties they had when they began working in the field, and authentic materials they use to perform work-related tasks. The main goal of this instrument was to collect enough data to design a questionnaire for students that would help them express their needs, and build the course around them. This aligns with a learning-centered approach (Hutchinson & Waters, 1987).

Students' Questionnaire 1

Having read the stakeholders' responses, we designed students' questionnaire 1 (see Appendix B) to compile a general list of tasks that business administrators have to carry out in English. This instrument consisted of four open-ended questions in which respondents were asked to mention work-related tasks that require writing, speaking, listening, and reading in English. The results of this instrument were used to design students' questionnaire 2, which would enable participants to specify the relevance and frequency of these tasks.

Students' Questionnaire 2

Students' questionnaire 2 (see Appendix C) aimed to gather general and specific data on the participants' target and learning needs, which is paramount for course designers (Hutchinson & Waters, 1987). The first section focused on students' personal information including their ages, majors, current work status, and the professions they may practice after graduating. Section 2 helps the course designers understand the participants' English background experience. Participants were asked to indicate previous English courses they had taken, the proficiency level required for each course, and the amount of time they had studied English. Additionally, a list of English-language descriptors adapted from Richards (2001, p. 75) was used by the participants to indicate their perceived proficiency level. As noted by Jordan (1997), self-assessment procedures

might be used by students to describe their language ability. Participants not only had to identify the frequency in which they used the four language skills in their academic lives but also they had to list target situations in which English is required. A list of specific business administration topics obtained from the stakeholders' questionnaire helped students indicate areas of study that they are exposed to in English. The third section of the questionnaire focused on the English for Occupational Purposes (EOP) needs of the population. The relevance and frequency in which the four language skills are used in the work environment were reported in this section. From a compiled list of tasks reported by stakeholders, participants had to select job-related tasks that require the use of English and to provide additional tasks that they considered important to perform in their jobs. Moreover, Hutchinson and Waters (1987) suggested that only identifying needs is insufficient. Understanding how far or close students are from being able to perform a specific task may determine the amount of instruction and support required; therefore, section four encompasses lacks that participants perceive to have when using English. Additionally, students were asked to describe aspects they consider challenging in each of the four language skills. Finally, section five addressed the participants' wants in terms of (a) the focus of the course, (b) language skills, (c) specific tasks they want to practice, (d) areas of study in the field of business administration, (e) how they would like to work in class (individually or in groups), and (f) class activities they like to participate in.

Students' Questionnaire 3

The third instrument used in this study was Students' Questionnaire 3 (see Appendix D), which addressed students' learning styles, attitudes towards language, and information about the participants' background experience. The first section included a description of each of Barbe's Visual, Auditory, and Kinesthetic (VAK) learning styles

provided by Acuña (2019). This model of learning styles was chosen, as it is easier for students to be able to categorize how they learn.

Participants were also required to list activities, didactic resources, and strategies that they use to improve their learning process. In the second section, students indicated on a Likert scale how much they liked English, how important they considered learning English at that moment, how relevant English is in their field of work, and how motivated they were to take an ESP course. This information would reveal students' attitudes towards the target language, which is one of the aspects that influence effective second language learning (Viet, 2017). The last question encouraged participants to describe their experience when learning English, including the context and how they have learned the language.

Students' Interview

The fourth instrument used was a students' interview (see Appendix E). The purpose of this interview was to obtain further information on the participants' workplace, the type and sources of written input that they are exposed to, and specific details on the tasks that business administrators need to carry out at work in English. It was a semi-structured interview containing four questions. This structure was chosen as it allows for clarification and follow-up questions that may arise during the interview. These questions were essential for participants to provide particular information about the reasons why the language is needed, the channels, types of discourse used, the content areas required, the context in which English is used, and other relevant aspects to carry out the target situation analysis. This was designed following Hutchinson and Waters' framework (1987, p. 59).

Stakeholders' Interview

The last data collection instrument used was an interview with the stakeholders (see Appendix F). The purpose of this semi-structured interview was to confirm the information previously obtained regarding the target population's needs, wants, and lacks in both EAP and ESP. For this reason, it consisted of 17 questions including multiple relevant topics for the needs analysis. In this instrument, the stakeholder was asked to provide authentic materials such as articles, reports, and project guidelines from courses that the students need to take in their major.

Description of the institution

According to the School of Business Administration's website, the most recent syllabus for the Business School at the UCR was designed in 1995. Their vision was to create a participative methodology composed of workshops and reflection that related to the role of a business administrator within society (para. 11). By 1996, the School Assembly decided to separate the school into two majors: Business Administration and Public Accounting. Today, the globalization, competitiveness, and technological advances that determine the demand for the current job opportunities has shaped this school towards equipping professionals with relevant skills. According to the School of Business Administration's website, the objectives of the Business Administration major are: (a) Training professionals with the ability to create, manage and administer organizations, as well as generating benefit, (b) developing academic activities that promote social responsibility and an ethical vision of the business, (c) providing future professionals with a comprehensive vision of organizations, (d) forming a solid knowledge of the technical tools of the Administration, the strategic and tactical planning and the promotion of managerial skills, and finally, (e) developing leadership skills that allow you to identify opportunities and propose innovative solutions, becoming an agent of change (para. 2).

Description of the field of work

To provide context on the participants' field, according to the UCR (2018) the labor market consists of private or public organizations that seeks to hire a professional who is capable of planning, guiding, organizing, and controlling administrative processes in several functional areas. These include general management, human resources (HR), finance, marketing, international commerce, quality, productivity, amongst others. Additionally, as indicated in the Website of Instituto Tecnológico de Costa Rica (TEC), these functional areas include ethics, social responsibility, and business vision. Moreover, the key areas of communications in business are "socializing, using the telephone, presenting information, participating in meetings and negotiations" (Sweeney, 2004, p. 4). Moreover, TEC's Business Administration website states that business administrators can conduct studies on marketing programs, carry out auditing processes, and conduct hiring events, and Human Resources (HR) evaluations. In addition, professionals in this field have to create training and personal development programs, measure risks, select the most appropriate promotion and marketing strategies for the company's products, and prepare strategic plans that respond to the objectives of the company (TEC, n.d.).

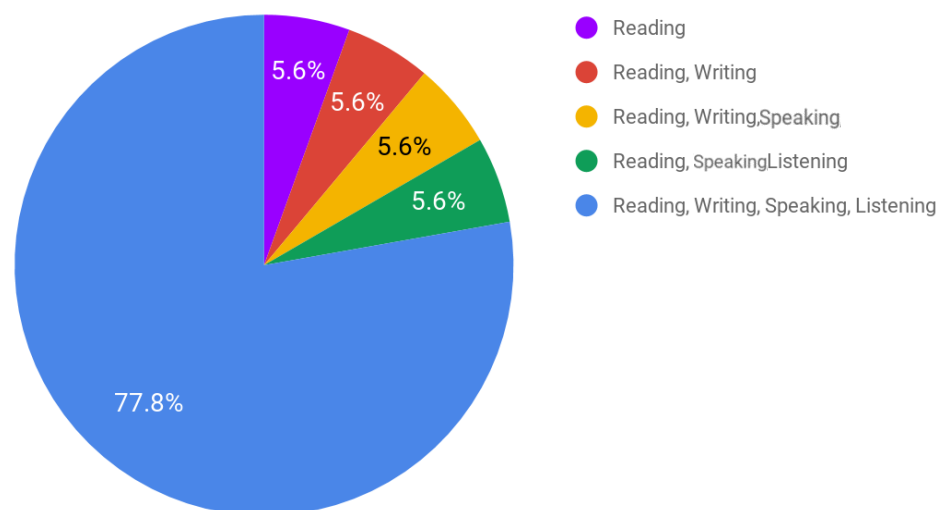
Interests of Primary Stakeholders

English is the language of business. Ku and Zussman (2010) claim that "one of the major consequences of the current phase of economic globalization has been the emergence of English as the leading *lingua franca* of international business" (p. 281); this means that professionals in this area must be able to communicate in this language. In fact, 95.2% of the participants who answered the stakeholders' questionnaire confirmed that English is a necessity for business administrators, and 86% of them indicate they currently use it at work. They express that reading and writing are the macro-skill that a business person uses the most, but still, they have to listen to and speak English at their

workplace. In effect, 77% of the stakeholders say they have to use all the macro-skills to perform tasks in English at work. Figure 1 displays these results:

Figure 1

Stakeholders' use of English at work per macro-skill. Question 1, Section 3; Stakeholders' questionnaire.



The stakeholders stated that the tasks they perform in English at work are understanding and composing emails about sales and purchases, composing improvement proposals, analyzing financial reports, participating at meetings with stakeholders to communicate and discuss problems and solutions, and participating in business conferences.

In addition, a business administration professor at UCR confirmed that English is crucial for people working in this field. She explained that companies expect applicants to have an advanced English level since they have to be able to interact with different people and situations using the language. She stated that people working in business administration have to be able to listen and speak English to offer services and products to

clients, talk to suppliers to get information about prices, goods and services, and explain financial reports in meetings. Also, she mentioned they have to write emails in English for consumers giving them information about products. Additionally, she mentioned that they usually have to answer inquiries and give a written description of a product to clients or management. She added that it is a common task to write a financial audit report to discuss it at a board meeting. Finally, she claimed they have to read financial reports in English and write marketing proposals, as well as reading inquiries from suppliers and clients about the pricing of products and services to agree on contracts or purchases.

Students' educational background

Our target population consists of 15 business administration students and 8 public accounting students. Their ages range from 19 to 35 years. Additionally, six participants are working in areas related to their field of study, while 16 are only studying. Although the course design's focus is on business administration, due to the interest and similarities in the major, students from public accounting were allowed to participate.

In terms of English background experience, the data collection instruments revealed that participants have studied English in a variety of contexts including elementary, secondary, and higher education in both public and private sectors, as well as in language institutions. Five participants have never taken an English course besides those taken in high school, while others have taken English courses at the beginner (8 students), intermediate (11 students), and advanced (2 students) levels. Additionally, eight participants had studied English for less than one year, while the rest reported having studied English for two years or more. Besides taking English courses, participants also mentioned being exposed to the language through media in several formats such as articles and documentaries, using apps like Duolingo, playing video games, visiting English-speaking countries, performing job-related tasks that require English, and studying

the language by themselves. Even when some participants mentioned taking advanced English courses in the past, all the participants reported that their proficiency was at a beginner or intermediate level. According to their perceptions, there are two low beginners, three high beginners, 11 low intermediate, and six high intermediate students.

Description of Needs

As stated above, English is fundamental for people working in the field of business administration. The participants confirmed that knowing English is a need for occupational purposes in all four skills. Reading and writing are needed for emailing customer requests related to purchases and sales, management communication, staying updated with marketing news for current trends, describing financial statements to make decisions, composing audit reports for process improvement, and writing a project proposal and a financial report. Finally, listening and speaking are needed to verify phone calls from clients, to have meetings to explain products and services to clients, to speak about processes that are currently taking place, to call clients to give inquiry resolution, and to listen to news about business-related topics. Table 1 presents these results:

Table 1*Percentage of Participants Who Perform These Tasks Daily*

Tasks	Percentage
Reading	
emails with customer requests related to purchases and sales	70%
emails from management	65%
marketing news for current trends	65%
financial statements to make decisions	17%
audit reports for process improvement	17%
Writing	
emails to clients	65%
responses to clients	61%
emails to management	57%
project proposals	26%
financial reports	13%
Listening and Speaking	
to understand business administration news	39%
to verify phone calls from clients	52%
to call clients to give inquiry resolution	52%
to speak about implemented processes	61%
to have meetings with potential clients	61%

Description of Wants

Concerning wants, 100% of the participants expressed their preference for taking a course focused on English for occupational purposes. According to what the participants indicated in students' questionnaire 1, more than 90% of them want to practice listening and speaking, and around 70% of the population prefer writing and reading. In terms of specific tasks for listening and speaking, they want to be able to have management and board meetings, improvise in topics such as accounting, stock market and finances, to have phone call conversations with potential clients, and present projects such as marketing campaigns. For reading and writing, they want to be able to read and to write

auditing, finance and commerce reports, emails to management and clients stating requests, and written responses to clients about necessities and requests. Moreover, most of the students selected auditing, finance, and commerce as the main topics for the course and expressed their desire to improve their grammar and to increase their technical vocabulary.

Description of Lacks

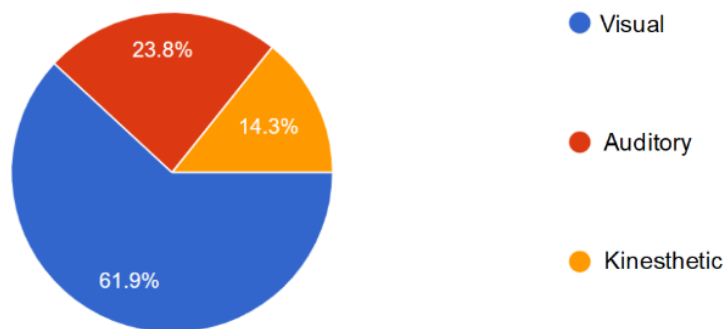
Most of the students perceive that they lack vocabulary, grammar, verb tenses, and correct pronunciation to communicate in English in an oral form. They struggle to understand fast speech and different accents when listening to someone speaking English. Also, the participants stated that they lack the necessary technical vocabulary and expressions to comprehend written texts in English. They feel that they fail to use grammar, punctuation, spelling, and different verb tenses correctly to write texts in English.

Students' learning styles and preferences

Regarding learning styles, 61.9% of the participants indicated to be visual learners. Figure 2 shows this information:

Figure 2

Distribution of participants' learning styles according to their beliefs. Question 1, Section 1; Second questionnaire for students.



Knowing the students' learning styles is useful when designing and selecting appropriate activities and teaching strategies for a language class. As Richards and Rodgers (2014) highlighted "the notion of learning styles can help capture the diversity of types of learners we meet in language classrooms and the different ways in which learners respond to teaching methods based on their learning style preferences" (p. 337).

Concerning participants' preferences in the dynamics of the class, they prefer to work individually or in groups during classes. 78.3% of the participants mentioned that they like to work in both ways, 13% individually, and 8.7% in groups. Also, watching videos and movies, writing and reading summaries, reading schemes, doing role-plays, reading aloud, studying with music, and participating in class discussions are some activities that the participants consider would benefit their learning process. When ranking how much they like English in a scale from 1 to 10 (1 meaning: "I do not like it a lot" and 10: "I like it a

lot), 61% of the students ranked it as a 10, 19% as a 9, 9.5% as an 8, 4.8% ranked it as a 7, and 4.8% ranked it as a 4. These results show an overall positive attitude from the participants towards English. Furthermore, all participants consider English to be very important in their field of work. Table 2 describes a group profile based on the previous analysis.

Table 2*Group Profile*

Positions at work	Participants are composed of eight public accounting students and fifteen business administration students. Seven of these participants are currently working in the following jobs: marketing intern, credit analyst, auditing assistant, and administrative assistant.
Needs	<p>English for occupational purposes: Reading is needed daily to understand information related to purchases and sales of services and products. In addition, they are required to marketing plans to stay up to date with current trends, financial statements to make business decisions, and audit reports to identify areas of improvement.</p> <p>Writing is needed daily to write emails to clients, management, and stakeholders about requests related to purchases and sales of products and services. Writing a marketing proposal and an audit report are also desired skills since they claimed this is an activity performed almost every month.</p> <p>Listening and speaking are needed four or more times a week to verify phone calls from clients and to listen to news about business-related topics; at least once a week they have meetings with potential clients to speak about implemented processes and to call clients to give inquiry resolution.</p>
Wants	<p>Skills and Topics All students want the course to be focused on English for occupational purposes. Most students want to practice listening and speaking to be able to have face to face and phone conversations with stakeholders and management. They are also interested in using the appropriate grammatical structures and technical vocabulary, practicing some reading and writing to be able to read and write marketing, financial, and audit reports. Finally, the students showed were mostly interested in topics related to auditing, marketing, and commerce.</p>
Learning Preferences	Most students prefer both individual and group assignments. They want to have activities such as role-plays, oral presentations, written practices, reading comprehension, class discussions, and didactic games.
Language Experience	Most students consider that they have an intermediate English level. Most of them have studied English for 1 to 3 years. All participants have taken English lessons in public high schools, and 18 of them have taken formal English courses at different institutions. Half of the group have at least taken an intermediate English course. They consider English to be important for their field and they feel motivated to take an ESP course.
Lacks	Most students perceived that they lack technical vocabulary, grammar, and verb tenses. They have difficulty understanding conversations with English native speakers.

Results and Discussion

The following section discusses the results of this needs analysis and the implications that they will have in the syllabus design. A group profile was determined based on the findings of the primary stakeholders' interests, the needs, wants, and lacks of the students. The course had to be designed for low intermediate students to meet most of the participants' needs since there was not enough time to administer a diagnostic test because of COVID-19. As reported by the participants, this course ought to be designed to address occupational needs over academic needs. Additionally, the course should address the four macro skills with an emphasis on speaking and writing. The results of the needs analysis also indicated that the contents of the course units should be built around reading stakeholders' requests related to purchases and sales, financial statements to make decisions, and audit reports that suggest process improvement. Other contents must include (a) writing emails to clients and management explaining products and services, (b) writing marketing project proposals, and (c) reading audit reports. Finally, regarding the speaking skill, students must exercise conducting formal business meetings with stakeholders and clients to provide purchase recommendations about products and services, presenting audit reports, and communicating marketing plans.

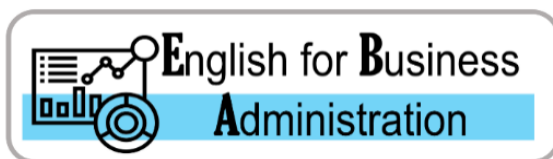
Finally, the course activities should be designed in such a way that they favor the visual and auditory learning styles. According to students' perceptions, they are unable to clearly understand fast speech; they have limited knowledge of technical vocabulary; they have difficulty producing sentences using correct verb tenses, and they need general reinforcement in grammar, punctuation, and spelling.

Chapter 2: Syllabus

The following section describes the different components of our English for Specific Purposes (ESP) course. It includes the logo, the course description, the statements of goals and objectives, its methodology, and assessment. For the student version of this syllabus see Appendix G. Additionally, a detailed description of each of the main tasks is presented. The design of this syllabus is supported by theory and based on a previous needs analysis carried out with 23 students from the Business Administration School at the University of Costa Rica.

Course Logo

The name “English for Business Administration” (EBA) was chosen to keep transparency and provide the right expectations for what the course will be about. Sober colors such as white, black, and light blue represent the formality of business. The icons in the logo represent finance, auditing, marketing, and stakeholder relations, which are major components of the course.



Course Description

English for Business Administration follows an English for Specific Purposes modality. Its purpose is to teach university-level students the particular English language features and communication strategies that they will need to work more efficiently during their professional careers. The focus of this course is to help students to successfully (a)

handle business interactions via text and voice, (b) write and present the main components of an audit report to stakeholders, and (c) elaborate and present a marketing mix section of a marketing proposal to stakeholders. The participants are students from the Business Administration School at the UCR. The needs analysis revealed that these students perceive themselves at a low-intermediate English level. Moreover, this EBA course will require two hours per week, for 14 weeks. Each lesson will be taught on Wednesdays, from 5:00 P.M. to 7:30 P.M., and three instructors will be present in every class. Due to the national emergency around Covid-19, this course will take place in a virtual environment.

Methodology

This section will discuss the methodology of the course from a technical perspective around the selected approach, classroom dynamics, tasks, techniques, as well as the role of the learners and teachers.

Approach

Richards and Rodgers (2014) define the Task-Based Language Teaching (TBLT) as an approach that is “based on the use of tasks as the core unit of planning and instruction in language teaching” (p. 223). They further expand that the purpose of this approach is to focus on activities that involve real communication, meaningful tasks, and language as support of the learning process. TBLT enables students to utilize specific language to carry out relevant activities. This approach has been selected for this course since it adapts to teaching language features that participants are required to use for their specific professional lives. Moreover, these skills and strategies are taught throughout the successful completion of tasks. Student teachers have identified tasks that can be organized and sequenced in a way that will facilitate learning while using meaningful

language features. Other characteristics that describe the TBLT are that there is focus on the process instead of the product, that learning happens through interaction, and that the use of authentic materials is highly encouraged (Feez, 1998).

Classroom Dynamics

Three teachers will be in charge of this English for Business Administration course. They will teach through a virtual environment following Covid-19 sanitary practices and social distancing recommendations. There will be a lead instructor and two assistant teachers. The lead instructor will be in charge of delivering one full class. This includes opening the class, presenting topics, giving instructions, explaining language related to the tasks, answering all questions, and managing the class in general. On the other hand, assistant teachers will support in minor tasks such as emailing materials, helping the lead instructor modeling conversations, taking notes of students' language mistakes, and help troubleshoot any connectivity issues. If required at any time, they will also assist by answering questions on the virtual chat, acting as students for activities with an uneven number of participants, supporting students to complete a task, and supporting any other requests indicated by the lead teacher. Teachers will rotate these roles every week. With the appropriate coordination, these dynamics will benefit both teachers and students by letting teachers experience both roles and allowing students to receive the instructor's support in all the activities. The roles of each teacher and general dynamics of each class will be explained at the beginning of every class.

Tasks and Techniques

All tasks and techniques in this EBA course will seek to imitate real-world scenarios. Nunan (1989) defines real-world tasks as activities that are identified from a needs analysis as important and useful for their professional lives. This ensures an

integrative approach by joining both language and technical skills; this approach will contribute to students' learning.

This course includes both group and individual activities in all four macro-skills. For reading and writing, the activities involve email writing, interpretation of policies, and the composition of business audit reports. All these are real-world tasks that will be familiar to students since they mentioned them as a priority during the needs analysis. To develop speaking and listening skills, students will role-play in virtual environments, practice public speaking through formal presentations, make phone calls and conduct meetings, and capture the gist of verbal and text messages. Different techniques are encouraged in activities such as peer feedback, note-taking, discussing, debating, problem-solving, negotiating meaning, and self-monitoring. As suggested by Jacobs (2014), these lessons will encourage collaboration and communication through group projects involving activities that are transferable to the workplace with the intention of promoting students' engagement in virtual classes.

Role of the learners

Because of the nature of the activities, students will be active participants and will be communicating constantly with each other in the target language. They will need to interact in different ways with their peers and teachers to boost their confidence and enhance their language learning process. This course includes activities in which learners act as monitors. They will have the opportunity to initiate a discussion and provide peer feedback at the same time, to support their reflection on the tasks (Bell & Burnaby, 1984). This course will leverage the background and technical knowledge that these students have acquired in their majors, which will bring that authenticity to the language learning process. As Bowman and Schleppegrell (1986) state, "knowledge of the specialty area

enables the students to identify a real context for the vocabulary and structures of the ESP classroom. In this way, the learners can take advantage of what they already know about the subject matter field to learn English” (p. 110). Finally, as recommended by Richards and Rogers (2014), course designers will ensure students will have risk-taker and motivator roles by allowing them to expand beyond their current level of proficiency and negotiate meaning.

Role of the teachers

The lead instructor, as supported by Richards and Rogers (2014) will enact as a selector and sequencer of tasks, will prepare and warm-up students for tasks, and will raise awareness. Instructors will select and sequence activities that enable students to learn by having the required tools and guidance to produce meaning freely. The teachers will design pre-tasks that will establish expectations and motivate students. Finally, the lead instructor will encourage participation, direct attention to critical details, and focus the class in relevant moments during discussions and oral presentations. Additionally, one of the teachers will act as an assistant teacher. He or she will prepare the online space, deliver materials at the appropriate time, and function as the timekeeper. The third teacher will function as an observer. He or she will take notes of the students’ behaviors, communication errors, and overall performance to collect data for a research project which will assess the effectiveness of the course. The observer teacher will also send a report with all the notes of the class to the other teachers.

Contents

Unit 1: Managing Your Stakeholders

Goal: By the end of this course, students will be able to correctly produce written and oral replies to stakeholders' requests about sales and purchases of products in a formal business environment.

General Objectives: By the end of the unit, the students will be able to:

1. Adequately construct formal written replies to customer requests about purchases and sales by using appropriate structures, vocabulary, and register.
2. Adequately respond orally to stakeholders' requests about purchases and sales of products by using appropriate structures, vocabulary, and register.

Unit 2: Presenting Your Audits

Goal: By the end of this course, students will be able to successfully show understanding of audit evidence to write a financial audit report and present it in a face-to-face meeting.

General Objectives: By the end of the unit, the students will be able to

1. Accurately write the main parts of an audit report based on the company's internal policies and audit evidence by using appropriate structures, vocabulary, and register.
2. Appropriately explain an audit report in a face-to-face meeting by using pertinent correct structures and business-related vocabulary.

Unit 3: Presenting Your Marketing Strategy

Goal: By the end of this course, students will be able to successfully write a marketing mix section (product, price, place, and promotion) of a marketing proposal and present it during a marketing meeting with stakeholders.

General Objectives: By the end of the unit, the students will be able to:

1. Construct a marketing mix section by following business format standards and correct English grammar and vocabulary.
2. Successfully present a marketing mix in a meeting with stakeholders by using effective public speaking strategies and correct English grammar and vocabulary.

Assessment Instruments

The following section includes the assessment instruments used in this ESP course. Both formal and informal assessment will be present in this course. Brown (2004) indicates that “informal assessment is embedded in classroom tasks designed to elicit performance without recording results and making fixed judgments about a student’s competence” (p. 5). Due to this, students’ performance during the course will be assessed through tasks in every lesson and this is beneficial for students’ progress in a TBLT course. This type of assessment will take place in the form of spontaneous observations, and general peer and teacher feedback during regular class activities. Moreover, Brown (2004) claims that formal assessment demonstrates whether students have managed to accomplish the goals of the course. To assess the achievement of these EBA course objectives, there will be formal assessment in the form of (a) role-playing business interactions via phone call, (b) presenting the main components of an audit report orally, (c) presenting the product detail section of a marketing proposal to other students acting as stakeholders orally, and (d) a set of written deliverables.

In addition, this course assessment will be formative and summative. As suggested by Graves (2000), formative assessment can show students’ performance, areas of improvement, and the extent to which the course meets their needs. This information benefits the decision-making process during the course as it enables instructors to make the necessary adjustments to increase its effectiveness. There will also be a summative

assessment task at the end of each unit. This is done to obtain data on students' overall achievement and the success of the lessons (Graves, 2000).

The assessment tasks in this ESP course were designed following Ellis' (2003) work-sample approach in which target situations are analyzed to determine the strategies and language features the students need to perform a task. First, by the end of Unit 1: Managing Your Stakeholders, students will work in pairs and pretend to be a business administrator and a stakeholder. Students have to role-play a phone call and write an email in which they discuss, provide, or request information on the sales and purchases of a particular product or service. These two tasks were chosen as the results of the needs analysis showed that handling business interactions with stakeholders was one of the most frequent tasks that this population needs to perform at work. By the end of Unit 2: Presenting Your Audits, students will write the main components of an audit report based on audit documentation provided by the instructors. Then, they will present their audit reports to the rest of the class simulating an audit committee meeting. According to the students and stakeholders, business administrators need to be able to write an audit report and participate in auditing meetings as part of their job duties. In Unit 3: Presenting Your Marketing Strategy, students will write the marketing mix section of a marketing plan. Later, they will present it in class simulating a meeting with board directors. These two tasks were selected because the participants showed interest in developing and presenting projects such as marketing plans in English. Because of the length of audit reports and marketing plans, we decided to focus on specific sections of these documents as the number of lessons is not enough to develop a complete report and plan.

In addition to these assessment tasks, attendance will also represent 10% of the final grade. This was decided as an attempt to encourage students to attend all the classes. 1% will be deducted for each class that students miss. Moreover, students will also create a portfolio including the materials and activities used in the course as well as

the email response, the audit report, and the marketing plan. According to Mumme and De Fina (as cited in Birgin & Baki, 2007), this assessment strategy helps teachers assess students' progress and the efficiency of the instruction and the course. The distribution of the formal assessment tasks and their percentages is presented in Table 3 below:

Table 3

Formal Assessment

Formal Assessment		
Tasks	Description	Percentage
Phone call Role-play	Handling business interactions via voice	20%
Project 1	Presenting the main components of an audit report to stakeholders	25%
Project 2	Presenting the product detail section of a marketing proposal.	25%
Written Deliverables	<ol style="list-style-type: none"> 1. Email response to stakeholders. (10%) 2. Written audit report (10%) 3. Written marketing proposal (10%) 	30%
Total		100%

Chapter 3 Course evaluation

In Costa Rica, ESP courses are becoming increasingly popular and necessary as international companies scale operations globally. Our practices as professionals in English teaching must evolve and adapt to this rapidly-changing business world around us. This change demands a great number of ESP courses that address the most relevant language needs. Sánchez (2018) supports this view when she claims that multinational companies in Costa Rica are captivated by the knowledge of a second or third language, and that it improves the opportunities to obtain a job, as these skills are needed to interact with local and foreign stakeholders. Liton (2012) suggests that an ESP course for business administration should “design the latest curriculum for business English classes to reflect what’s happening in the contemporary business world” (p.4). By designing, implementing, and evaluating effective English courses, we are enabling learners to improve the language skills required in their professions; thus, increasing their chances of success in the business world.

This report aims to evaluate the effectiveness of an English for Business Administration (EBA) Course using the following criteria: the degree to which its goals and objectives were achieved, measured through task completion, as well as the overall student perceptions of the relevance of the course contents to the business world, measured through program evaluations. We believe that if the learners were able to successfully complete the tasks, and if they feel that they can use the course contents in future jobs, then the course has been effective. The research questions which guided this study are presented below.

Research Question

To what extent was the English for Business Administration online course effective in terms of goal/objective achievement and relevance of unit contents to the field?

Sub question 1

To what extent were the goals and objectives achieved in the EBA online course?

Sub question 2

According to students' perceptions, were the unit contents relevant to the field?

Literature Review

The importance of gathering data through program evaluation to improve language courses, especially in the field of ESP, has been widely documented (Kuppan, 2008; Hussein & Shafiei, 2012; Acosta et al., 2015; Çelik & Topkayab, 2016; and Çelik, 2018). Diamond and Sudweeks (1980) claim that evaluation provides three levels of data: (a) what is occurring during the teaching process, (b) what aspects are being effective, and (c) what areas need improvement. Obtaining this information is essential for language instructors as it allows for changes that can improve the learning experience and the program itself. This literature review focuses on program evaluation, mainly of ESP courses that adopt the TBLT approach. It discusses the relevance of the course contents to the business administration field, successful achievement of course goals and objectives, and students' perceptions of course effectiveness.

Program Evaluation

The evaluation of a program must be carried out to ensure that courses are effective. Acosta et al. (2015) refer to course evaluation as “a tool that provides a general

picture of what a course was or is like, reveals important information that could improve the course if taught in the future, and proves if it was successful in meeting its goals or not” (p. 265). In addition, Graves (2000) indicates that the main aspects to be evaluated in a course are goals and objectives, course content, needs assessment, the way the course is organized, the materials and methods, and the learning assessment plan. Assessing the course outcomes’ alignment to the stated goals and objectives provides an opportunity for the continuous improvement of the program. Research has demonstrated that the characteristics of program evaluation align with formative assessment principles. Boston (2002) claims that “the goal of formative assessment is to gain an understanding of what students know (and don't know) in order to make responsive changes in teaching and learning” (p. 1). An additional study by Graves (2000) provides three main reasons why a formative assessment is important; (a) meeting students’ needs by evaluating what is effective and making changes accordingly, (b) allowing students to have a say in the learning process, and (c) gathering data to restructure the course. This means that using formative assessment can help determine whether the objectives of an ESP course have been accomplished and the extent to which materials have contributed to the students’ learning experience. Having mentioned the elements of effective program evaluation, we consider that its assessment must include the selected approach, in this case, Task Based Language Teaching (TBLT).

Task Based Language Teaching and Assessment

Defining TBLT and the role of assessment in this approach will guide how to successfully meet students’ needs. Since TBLT centers on specific tasks that adapt to learner needs, program assessments should evaluate task completion. Richards and Rodgers (2014) define TBLT as an approach that is “based on the use of tasks as the core unit of planning and instruction in language teaching” (p. 223). They further expand on the

idea that the purpose of this approach is to focus on activities that involve real communication, meaningful tasks, and language as part of the learning process. Due to the nature of TBLT, traditional assessment (i.e. written exams and quizzes) lacks the necessary criteria to evaluate students' performance while completing tasks that resemble real life (Acosta et al., 2015). This idea supports the implementation of direct assessment, as explained by Nunan (2004), in which students are required to perform tasks that are similar to the ones they will do in the real world. Furthermore, Task Based Language Assessment (TBLA) follows the same core principles of TBLT regarding learning and teaching while also addressing testing and assessment (Coombe et al., 2012). TBLT and TBLA provide a complete framework to design relevant tasks and understand how to assess them. The following section will explain how these tasks can be relevant to learners' realities.

Relevance of unit contents in an ESP course

One of the basic needs of ESP students is to successfully perform field-related tasks using English (Hutchinson & Waters, 1987); thus, the contents of ESP courses must be chosen based on what those students will need in a professional setting. The course effectiveness is then evaluated by assessing the relevance to real world applications. Experts agree that using content that resembles real-life tasks enhances the learning experience and motivates students. For instance, Coombe et al. (2007) state that "language learners are motivated to perform when they are faced with tasks that reflect real-world situations and contexts" (p. 25). More than simply reflecting the real world, learners need to be exposed to situations that will be applicable to the reality of their professional environment. Blagojević (2013) refers to these materials as 'authentic materials'. He mentions that learners' motivation in class can be positively influenced by

materials designed in accordance with their academic needs. Evans (2013) elaborates on the difficulty of designing fully authentic tasks by explaining that “materials and activities for Business English will never be able to replicate the complexities of the contemporary business world”. However, he adds that this can be overcome by forming “a deeper understanding of the types of tasks that professionals are required to perform in English and how they flow and interrelate in the course of their work” (p. 289). Moreover, House (as cited in Torregrosa & Sanchez-Reyes, 2011) claims that authentic materials allow students and teachers to “link the formal, and to some extent artificial, environment of the classroom with the real world in which we hope our students will be using the language they are learning” (p. 89). These claims support the idea that the relevance of the program content is directly related to the authenticity of its tasks and materials. This relevance can also generate motivation amongst students, which has been found to have a positive impact on students’ academic achievement when learning a second language (Dörnyei, 1994; Schmidt et al., 1996; and Far et al. 2016). Analyzing the relevance of the contents and learners’ motivation might help determine the effectiveness of an ESP course. It is also key to understand the extent to which learners are able to achieve the course goals and objectives.

Successful Achievement of Goals and Objectives

There is consensus among studies on course evaluation that one of the main aspects of course evaluation is the achievement of its goals and objectives by observing students’ performance. Hutchinson and Waters (1987) claim that the effectiveness of a course can be determined through the assessment of students’ performance. More importantly, Graves (2000) explains that the assessment should respond to how the objectives were defined. This is supported by Adam et. al. (2014) who conclude that “ESP

assessment should be focused on assessing the ability to use language precisely in order to perform relevant tasks in various contexts while integrating aspects of field-specific background knowledge” (p. 161). Evaluation should focus on observing and analyzing students’ performance in these tasks. To achieve this purpose, research has shown that analytic rubrics are an effective way to measure students’ performance. Brookhart (2013) lists several advantages of these rubrics; for example, they allow students to receive formative feedback, are easier to relate to instruction, and can be adaptable for summative assessment. Additionally, Shehadeh (2012) mentions that analytic rubrics allow the evaluator to make a more functional measurement of the learners’ capabilities. Existing research also recognizes the critical role played by teacher observation to determine the successful completion of tasks. This is usually called direct assessment. Shehadeh (2012) states that direct assessment direct assessments center around assessors evaluating learner performance on tasks based on predefined criteria, with or without making additional judgements.). Acosta et al. (2015) support this idea by claiming that “teachers are probably the main evaluators as they are constantly paying attention to the students and their performance, the flow of the course from class to class, and goal achievement” (p. 265). On the other hand, relying on the behaviors observed by the teacher can make the assessment subjective. Acosta et al. (2015) provide a solution by explaining that direct assessment can be contrasted by using rubrics to obtain reliable data to determine whether a course is effective or not. Thus, there can be a balance between teacher observation and objective assessment. Moreover, beyond the results that the completion of a task can yield, there should be awareness of students’ perceptions of the course as their feedback can also help determine the effectiveness of a program.

Students' Perceptions and Level of Satisfaction

Students' perceptions of a course have been approached differently with researchers focusing on aspects such as emotional responses and student satisfaction. For example, Forsyth et al. (1999) claim that course evaluation must take into consideration learners' feelings and opinions regarding the materials and classroom activities. In this research study, students' perceptions also include their level of satisfaction towards the course. Moreover, O'Leary & Quinlan (2007) refers to student satisfaction as an emotional reaction towards the quality of the service provided during the learning event which includes the materials and teaching practices. Understanding students' perceptions and their level of satisfaction with a course provides valuable insights which can contribute to the improvement of a program.

Methodology

Approach

A combination of quantitative and qualitative approaches was used in the data analysis. Dörnyei (2007) describes quantitative studies as those that collect data in numerical form which is later analyzed from a statistical perspective. This method often resorts to surveys and questionnaires. On the other hand, he explains that qualitative research collects "open-ended, non-numerical data" that requires the use of "non-statistical methods" to be synthesized (p. 24). In this study, there is an interest in the opinions of the students and instructors, as well as the observation and interpretation of behaviors and task outcomes through graded rubrics. Therefore, this research study adopts a mixed methods approach since it involves collecting data using questionnaires, observation forms, focus groups, and analytic rubrics. The purpose of combining methods

is to achieve a fuller understanding of this course evaluation while analyzing the data collected in this study.

Setting and Participants

This study was carried out while the English for Business Administration course was team-taught through a virtual platform using the Zoom software. Each student teacher was in charge of a weekly session every three weeks. This course started on August 12th, 2020 and concluded on November 18th, 2020. It was taught once a week on Wednesdays from 5:00 p.m. to 7:00 p.m.

The participants in this study consisted of four business administration students and three public accounting students. Their ages ranged from 19 to 35 years. In terms of their background experience as English learners, previous data collection revealed that the participants had studied English in a variety of contexts including elementary, secondary, and higher education in both public and private schools, as well as in language institutions. In each session, one of the student teachers, not facilitating the lesson, observed the class and collected data using an observation form.

Instruments

To collect the data for this investigation, we used observation forms, unit evaluation questionnaires, analytic rubrics for the main tasks of each unit, a final course evaluation form, and a focus group session.

Class Observation Form (see appendix H). This instrument was designed for the student teacher in charge of observing the class. The objective was to gather evidence to determine the degree to which students were able to complete the main tasks of each unit. The form provided guiding questions for the observer to consider while taking notes and room to write down any relevant evidence.

Unit Evaluation Questionnaires (see appendix I). We designed a unit evaluation questionnaire to collect data on the relevance of course contents and goal achievement after completion of each unit. The questionnaire format was the same across sections, adjusting only the goals to reflect the relevant section of the material. This questionnaire consisted of three 4-point scale questions and four open-ended questions. The 4-point scale questions evaluated the learner perception of the content relevance, as well as identifying factors contributing to the accomplishment of the goals and objectives of the course. The open-ended questions were designed to collect anecdotal evidence to support the results of the close-ended ones.

Analytic Rubrics (see appendices J, K, L, M, N, O). The analytic rubrics were designed to assess students' performance during the main tasks of each unit to help researchers collect evidence to determine the level of accomplishment of the goals and objectives. There were two main types of rubrics. The rubrics for speaking tasks assessed content, fluency, pronunciation, grammar, and vocabulary. The rubrics for writing tasks assessed content, organization, vocabulary, grammar, and punctuation.

Final Course Evaluation Questionnaire (see appendix P). The objective of this questionnaire was to gather data from students after the course was completed. This questionnaire included four different sections addressing the relevance of course content, materials, activities, vocabulary, and expressions acquired (language chunks). In the first section, students rated the level of relevance of the main tasks. Then, they had to list the most and least relevant tasks and justify their answers. In the materials and activities sections, students rated the effectiveness of the materials and activities, justifying their ratings. In the last section, students made a list of expressions and vocabulary they learned in each unit.

Focus Group (see appendix Q). A focus group discussion was held to gather students' perceptions of the course objectives, usefulness of the tasks, materials, and language taught. The participants also had the opportunity to provide recommendations for future courses. The objective of this instrument was to collect more data that could be used to triangulate the findings of this study in order to increase their credibility and validity.

Procedures

All the data collection instruments were administered virtually, and all the lessons were video recorded. The data collection process started in the second class. In order to reduce subjective bias, the observations were completed by all three instructors. The analytic rubrics were used to grade both the writing and speaking main tasks in each unit. There were two rubrics per unit, six in total for the course. These tasks were completed during the third and fourth lessons of each unit and were graded by watching the video recordings after the class had ended. The tasks were graded jointly by all the instructors. At the end of each unit, students were emailed a link to the unit evaluation questionnaire. All questionnaires allowed the students to answer open-ended questions in Spanish; however, the questions were in English. Students completed the survey at the end of each unit. During the last class, the students completed the final course evaluation questionnaire and held the focus group discussion. All comments and answers in this activity were recorded in a document by one student teacher while the other two conducted the discussion. Finally, we analyzed the data using triangulation to validate the results.

Results and Discussion

In this section, we review the results of the study regarding achievement of goals and objectives as well as examine the insights from the students' perceptions of the relevance of the course content in the business administration field.

Achievement of goals and objectives

The results are presented unit by unit, followed by their corresponding discussion and analysis.

Unit 1: Managing your stakeholders

Unit 1 goal stated that at the end of the course, the students would be able to correctly produce written and oral replies to stakeholders' requests about sales and purchases of products in a formal business environment. The general objectives indicated that students would (a) be able to adequately construct formal written replies to customer requests about purchases and sales, and (b) adequately respond orally to stakeholders' requests about purchases and sales of products. We planned to accomplish the first general objective with three pre-tasks, and the second general objective with three pre-tasks and one main task. From the class observation notes, we confirmed that students were able to accurately complete all pre-tasks and main task. For instance, the students understood the products' descriptions; however, they had difficulties pronouncing technical vocabulary. Additionally, the students had some issues coordinating group work at the beginning of several tasks, but this weakness did not interfere with the completion of the main task. A reason for this may be that it was the beginning of the course and the students were still adjusting to a virtual setting. To further determine if the main tasks had been completed successfully, we examined the results yielded from the two analytic rubrics that were used for the main tasks.

For the first main task, the students were asked to write an email comparing two conferencing products and providing a purchase recommendation. They were evaluated in terms of vocabulary, grammar, organization, and content on a scale from 1 to 10 for a total of 40 points (See appendix J). Table 1 shows that all students received a score higher than 80, which was determined as the passing score in the design of the course following UCR Maters' Program standards. The average score for the class was 90. Some of the common mistakes in this task were related to spelling mistakes, especially omitting double consonants (i.e. *finally, recommend*) and writing sentence fragments (i.e. *Because it is very expensive.*). These results suggest that the students were able to acquire the specific required skills during the preparation stages, and this allowed them to correctly execute the task.

Table 4

Scores for Unit 1 Main Tasks (Written and Oral Replies to Stakeholders' Requests)

Participants	Scores for Writing Task	Scores for Speaking Task
Ss 1	87.5	86
Ss 2	90	94
Ss 3	87.5	96
Ss 4	92.5	92
Ss 5	82.5	88
Ss 6	95	94
Ss 7	95	96
Average	90	92.29

Ss=Student

For the second main task, the students were asked to respond to stakeholders' requests in a business meeting about the terms and conditions of a banking service. They were evaluated in terms of pronunciation, grammar, fluency, vocabulary, and content on a scale from 1 to 10 for a total of 50 points (See appendix K). Table 1 also shows that all students received a score higher than 80. The average score for the class was 92.29. This reflects that students were able to perform the tasks successfully. Students performed slightly better in the speaking task than in the writing task. One reason for this could be the time they spent preparing to complete each task, since they worked during two classes on the speaking task and one class on the written one. In terms of pronunciation, they struggled with word stress placement (i.e. *accordance*, *distributed*, *guarantee*). When asked during the focus group discussion, the students mentioned that they were more excited when the classes were about speaking, which could have positively influenced their performance as they scored higher in the speaking tasks of each of the units. This may be due to the relevance of this skill for their future careers. We also asked students if they found the technical vocabulary useful as well as their perception in changes to their overall English proficiency. All the participants agreed with both statements and some comments indicated that Unit 1 was very helpful in terms of improving the students' vocabulary. The students expressed that they perceived that their technical vocabulary had improved because they were more comfortable reading field-specific texts. These comments may explain why the grades obtained were high. In the focus group, the students were asked if they believed the objectives for Unit 1 had been accomplished. One student mentioned that they "did a good job" comparing the two technological products. Another student explained that although their language abilities had been challenged by Unit 1 tasks, they were still able to attain the goal. Based on these results,

we can interpret that students demonstrated a high performance in Unit 1 and that they fully achieved the objectives. These findings are indicators of course effectiveness.

Unit 2 Presenting your audits

The Unit 2 goal was for students to successfully show understanding of audit evidence so that they could write a financial audit report and present it in a face-to-face meeting. The general objectives were for students to (a) write the main parts of an audit report based on a company's internal policies and audit evidence and (b) explain an audit report in a face-to-face meeting with stakeholders. To determine whether these goals and objectives were achieved, the following findings were drawn from the class observation notes. The students had difficulties understanding the instructions for the scanning of an audit report pre-task of the written task. These difficulties affected the completion of this pre-task since the students ran out of time and were not able to finish it. Moreover, when observing the progress of the main task (i.e. writing the introduction of an audit report), the students needed additional examples and were not able to complete the task in the time allotted. The teacher had to ask the students to finish the task as homework. On the other hand, we observed that the main tasks for the following two classes, which were about writing the scope and objectives and the findings and recommendations sections, were done on time and satisfactorily. For the speaking task (presenting an audit report in a meeting with stakeholders), the students were able to complete all the pre-tasks and the main task. However, the students expressed that they did not feel comfortable during the completion of the task because they felt they needed more time to prepare themselves.

Table 2 displays the scores that the students obtained, which allows us to determine the students' performance in the main tasks. The analytic rubrics used to

assess this task take into consideration the three audit report sections that the students wrote as well as the oral presentations.

Table 5

Scores for Unit 2 Main Tasks (Writing and Orally Presenting Financial Audit Reports)

Participants	Scores for Written task	Scores for Speaking Task
Ss 1	85	88
Ss 2	92.5	90
Ss 3	90	98
Ss 4	90	96
Ss 5	85	94
Ss 6	92.5	96
Ss 7	95	96
Average	90.3	94

Ss=Student

For the main task, the students were asked to write one section of an audit report per class. They were evaluated in terms of vocabulary, grammar, organization, and content on a scale from 1 to 10 for a total of 40 points (See appendix L). As shown in Table 2, all students obtained a score higher than 80. The average grade for the class was 90.3. It is important to note that the most common mistakes in this task were related to punctuation (i.e. comma splices and missing commas) and grammar, including issues like sentence fragments and subject-verb agreement. Although these were not topics within the course syllabus; they were addressed as part of formative assessment. Regarding the content taught during this unit, the students were able to successfully use the vocabulary and followed the structure of audit reports.

For the second main task, the students were asked to present their audit reports in a meeting with a board of directors. They were evaluated in terms of pronunciation, grammar, fluency, vocabulary, and content on a scale from 1 to 10 for a total of 50 points (See appendix M). Table 2 shows that all students had a score higher than 80. The average score for the class was 94. This indicates that the students were able to exceed performance expectations. Some students mispronounced some of the auditing-related vocabulary previously studied in class (i.e. *asset, procedures, conducted, administrative, purpose*). Despite these words being modeled and reviewed during the pre-tasks; however, the students were not able to produce them correctly during the assessment. Regarding this, the students mentioned that they would have benefited from having more preparation time. The lack of preparation time could have been the reason why they had issues pronouncing those words. This pronunciation weakness should be considered as an area that needs improvement in future ESP courses. Even with those pronunciation errors, the students performed slightly better in the speaking task than in the writing task. This fact may be due to (a) the motivation to practice the speaking skills based on the wants gathered in the needs analysis, and (b) the fact that they had more preparation time for this task relative to the writing one. To triangulate these results, the students were asked on a survey if they had learned useful technical English and if their English had improved. All participants agreed with both statements. Some comments provided by the students mentioned that their pronunciation improved on technical words such as *audit, process, scope, headquarters, and compliance*. Additionally, the students were asked if they believed that the goal of the unit was met; six students agreed that the goal was met, and one disagreed. One student commented that the presentation of the audit report was too fast-paced and that they did not feel they had truly accomplished the objective. We can say that the students were able to accurately complete all of the tasks on time except scanning an audit report, which was a pre-task activity. Moreover, the results also show

that the scores on this oral task were above the passing score for all participants. These findings reveals that the students were able to apply the knowledge they had acquired during the activities and they had enough scaffolding during the preparation stages, which is also supported by the results from the observation forms. Additionally, the majority of the students claimed that they perceived that the goals were accomplished. Their responses suggest that they were satisfied with their performance.

Unit 3: Presenting your marketing strategy

Unit 3 goal state that the students would be able to write a marketing mix section (product, price, place, and promotion) within a marketing proposal and present it during a meeting with stakeholders. The general objectives were for the students to (a) construct a marketing mix section by following business format standards, and (b) present a marketing mix in a meeting with stakeholders by using effective public speaking strategies. Through the observation forms, we were able to determine that all of the main tasks were completed successfully. We also observed that for the place and promotion tasks, the students were able to apply their academic background knowledge to complete the tasks.

To determine the students' performance the two main tasks (i.e. writing the marketing mix section of a marketing proposal, and presenting a marketing mix in a meeting with stakeholders), we used analytic rubrics to assess them. Table 3 shows these results.

Table 6**Scores for Unit 3 Main Tasks (Writing and Orally Presenting a Marketing Proposal)**

Participants	Scores for Writing task	Scores for Speaking Task
Ss1	95	94
Ss2	97.5	96
Ss3	95	98
Ss4	95	100
Ss5	87.5	90
Ss6	97.5	98
Ss7	87.5	98
Average	93.5	96.2

Ss=Student

For the main task, the students were asked to write two sections of a marketing mix per class (in two classes). They had to present the final written report and make a formal oral presentation. The written report was evaluated in terms of vocabulary, grammar, organization, and content on a scale from 1 to 10 for a total of 40 points (See appendix N). As can be seen in Table 3, all students got grades over 80. The average score for the class was 93.5. As was the case in previous units, the students produced the expected outcome successfully. The most common mistakes made in this task were related to punctuation (missing commas), and pronouns (using the wrong pronoun). Both topics were later addressed as part of formative assessment since they were not part of the course contents. What this tells us is that the students were able to complete the tasks but still had some difficulties that did not affect the result of the task. In other words, the students' writing was not impeccable, but the message was conveyed successfully.

For the second main task, the students were asked to present a marketing mix as if they were in a meeting with stakeholders. They were evaluated in terms of pronunciation, grammar, fluency, vocabulary, and content on a scale from 1 to 10 for a total of 50 points (See appendix O). Table 3 shows that all students obtained a score higher than 80. The average score for the class was 96.2. Three students struggled with the pronunciation (stress misplacement, omitting final consonant sounds) of previously studied words. The students performed slightly better in the speaking task than in the writing task; however, both tasks were marked with high scores.

To support these results, the students were asked on a survey if they had learned useful technical English and if their English had improved. All the participants agreed with both statements. Moreover, from the observation notes, we identified the fact that there was some additional class time dedicated to practice technical words using feedback strategies such as recast and choral repetition. This strategy seems to have been effective because the students mentioned that their pronunciation of technical words such as *thriving*, *lack thereof*, *widespread*, and *shipping* had improved. Additionally, the students were asked if they believed that the goal of the unit was met. For this unit, six students agreed that the goal was met, and one disagreed. A reason why the students disagreed was the low difficulty level of the activities since they mentioned that some could have been more complex to match the demands of the business world. Some students mentioned that they would have benefited from learning more about sociocultural factors; however, covering all the skills required in the business world is challenging. Although we worked on areas such as public speaking, formality and politeness in business settings, we recommend increasing the focus on other social factors besides linguistic ones to increase satisfaction. This supports the claims by Evans (2013) that classroom activities cannot fully replicate the intricacies of real business-world situations. From these findings,

we can conclude that the students were able to complete all of the tasks in the allotted time and in an appropriate way.

By examining the results from the three units, we can say that the students were able to complete the tasks appropriately on time with only a few language mistakes which did not affect the accomplishment of the objectives. This success was probably due to influencing factors as reported in the focus group. For example, the students mentioned the appropriateness of the activities, excellent time management during most lessons, and their motivation as positive factors to keep them on task all the time. These factors helped the students achieve the proposed course objectives. Moreover, the students met the performance expectations when assessed in a variety of field-specific scenarios. In these assessments, there were language mistakes identified during the completion of the main tasks; however, these did not prevent the students from producing the desired outcome. Additionally, all the grades on the tasks were high, and the majority of students claimed that they perceived the goals had been accomplished. They also expressed that the materials were similar to what they use in their academic and professional environment. This positive comment can be taken as a sign of course effectiveness, as Blagojević (2013) claims that authentic materials can generate motivation in students, which is a reflection on appropriate course design in accordance with their academic needs. All students confirmed these materials helped them with the completion of the tasks. Moreover, the students claimed that they had a noticeable improvement in pronunciation. One reason for these results could have been the emphasis given to pronunciation during most of the warm-up activities, in which the students were shown words, phrases, and sentences to read aloud to check pronunciation. As Hutchinson and Waters (1987) claim, results like these can be, to some extent, evidence of the effectiveness of the course itself since learners' performance is a reflection of the skills and knowledge acquired.

Students' perceptions of course content relevance

Following Forsyth et al. (1999) course evaluation recommendations, we decided to analyze students' perceptions of the relevance of the course regarding tasks, materials, and the language that was included in each unit. Table 4 shows the students' responses to the relevance of the main tasks of each unit in the field of business administration. The students were asked to rate the 10 main tasks completed during the course. The numbers in the table indicate students' responses to each option.

Table 7**Students' Perceptions of the Relevance of the Tasks**

Main Skill	Unit	Task	Not Relevant	Somewhat Relevant	Relevant	Very Relevant
R	1	Understanding the terms and conditions of banking services	0	1	2	4
R	2	Understanding an audit report and its main components	1	0	1	5
R	3	Understanding the main components of a marketing mix	0	1	0	6
S	1	Responding to stakeholders' business requests related to banking services in a meeting	0	0	2	5
S	2	Presenting an audit report to a board of directors in a business meeting	0	1	2	4
S	3	Presenting a marketing mix in a business meeting	0	1	1	5
W	1	Writing an email comparing two technological devices to suggest a purchase decision	0	0	5	2
W	1	Writing an email to answer stakeholder's requests	0	0	0	7
W	2	Writing an audit report	1	1	0	5
W	3	Writing a marketing mix	0	1	0	6

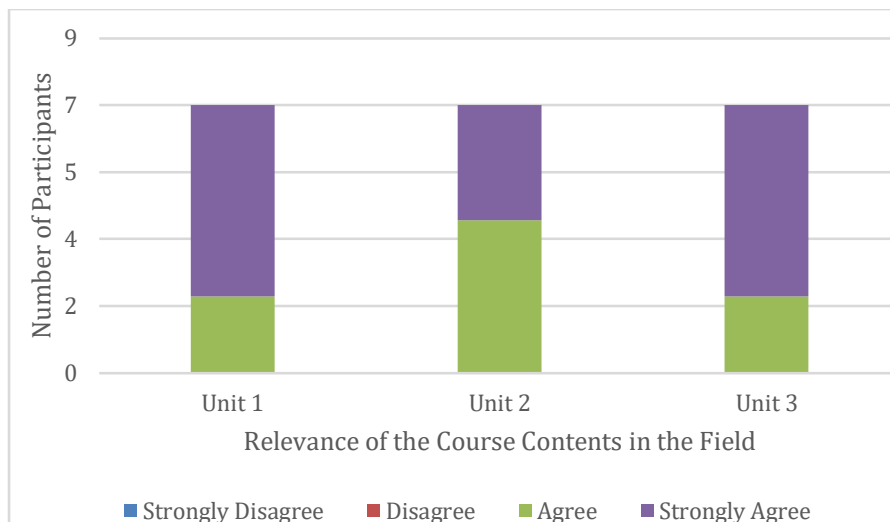
R= reading

S= speaking

W= writing

Unit 1 tasks received the most favorable relevance rating including the top-rated task , writing an email to answer stakeholders' requests. A reason for this could be that writing emails is one of the tasks that they have to undertake most often in their professional context as business administrators or public accountants. The lowest ranked task was writing the audit report with 5 favorable ratings and 2 unfavorable ratings. We used the focus group to gather more information on this matter, and one student shared that audit reports were not as relevant for those students in public accounting. Furthermore, speaking activities were the best rated, followed by reading and then the writing ones. This result aligns with the design of the course since it was focused on speaking activities based on the results of the needs analysis done prior to the course. Overall, by looking at the total numbers, there is a clear inclination towards the relevant and very relevant options, which may reveal that the students considered the tasks to be relevant to their field.

Furthermore, to help determine the effectiveness of the course, the students were asked to which extent they considered that the unit contents were relevant to their field. Figure 1 shows these results.

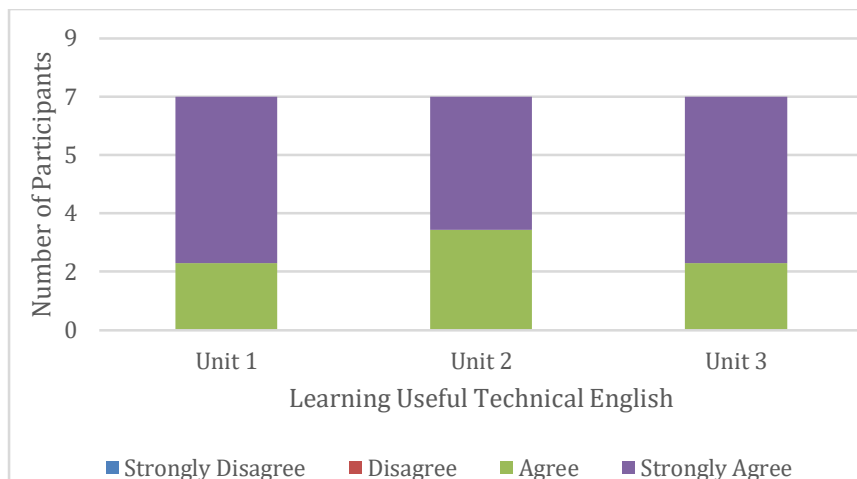
Figure 3*Students' Responses as to the Relevance of the Content*

All the students either agreed or strongly agreed that the contents in Unit 1, 2, and 3 were relevant. These results indicate that the contents were appropriately designed to meet this specific population's lacks, wants, and needs. For example, for Unit 1, one student stated that the content of the unit was tightly related to the business administration environment.

A factor that prevented the students from strongly agreeing could have been time constraints. Due to the small number of lessons in this course, there was not enough time to study certain topics in depth. For instance, for Unit 2, one student suggested studying other types of audit processes such as financial or internal control auditing for private companies or shared service centers. Another student mentioned that although he was not interested in Unit 2 because their major only includes a course on auditing, this unit had been valuable since it had taught him the basics to take such a course in the future. Other

four students expressed that they are now able to use what they learned to read and write audit reports. Similarly, for Unit 3, there were six comments on how relevant this content was for their profession. Additionally, two of these comments indicate that what the students learned in this unit addresses their academic needs. Moreover, all students reported that the materials were either relevant or very relevant to their field. In the comments, the students referred to the materials of the units as “helpful”, “essential”, “interesting”, and “adequate.” One factor which may have contributed to obtain these results is the fact that for the design of the course, we decided to obtain materials and content from authentic sources, as suggested by Blagojević (2013), and we carefully designed the main tasks and pre-tasks of each of the units based on the needs analysis results.

As mentioned by Forsyth et al. (1999), examining students' perceptions can be very valuable in the evaluation of a program. Figure 2 illustrates the perceptions that students had of their technical English acquisition after each unit.

Figure 4*Students' Responses as to Learning Useful Technical English*

In Units 1, 2 and 3 all students agreed that they have learned useful technical vocabulary. The students also mentioned that they strongly believe that they are going to be able to use this vocabulary in both their academic and professional settings. For Unit 1, participants reported that they had learned the vocabulary required to open a meeting and write an email. Some of the expressions they reported learning were *currency*, *payable*, *liable*, *accrue*, *affordable*, *fees*, *hereby*, *nonetheless*, and *wholesale*. For Unit 2, the students indicated that they are able to use expressions and vocabulary to present the findings of an audit report. *Withdraw*, *due date*, *scope*, *assurance*, *headquarters*, *compliance*, *enhance*, *audit evidence*, *assets report*, *factual*, *policies*, and *circumvent* were examples provided by the participants. Two of them also highlighted that the vocabulary studied is necessary to understand and go through complex audit processes. For Unit 3, the participants mentioned that they had learned enough vocabulary to understand and write the different sections of a marketing mix. Some of the examples given were *thriving*, *widespread*, *word of mouth*, *encapsulates*, *warranty*, *advantage*, *bundle*, *anchorage*, *bound*, *shareholder*, and *stakeholder*. This positive perception of vocabulary acquisition

reported by the participants may have been promoted by the inclusion of at least one pre-task in almost all the lessons to expose learners to the new vocabulary required to perform the main task. In addition to this exposure, we also adapted the materials and vocabulary to meet students' proficiency level, and this adaptation could have helped students to understand the new information easily.

With this discussion, we have attempted to determine whether the English for Business Administration online course was effective or not. We were able to see that the course was effective in terms of its content relevance to the business administration field and successful achievement of course goals and objectives. Students' perceptions of these two aspects confirmed the findings of this study. We expect this study to be a contribution to the English teaching field, mainly to the ESP area. We strongly believe this report can help other course designers and teachers because it provides a thorough description of the evaluation process of an ESP course for business administration. We also think that there is an opportunity to assess other course components beyond performance and perceptions, for example, administering a formal pre and posttest to determine students' proficiency level in ESP will provide additional details that can support the effectiveness of the course. In our case, because the coronavirus pandemic led us to change traditional face-to-face instruction, we were not able to administer a formal language proficiency test. Nevertheless, the class outcomes suggest that this course was effective and that it will be useful to our participants in the near future.

Conclusions

From the above findings, we conclude that the English for Business Administration course was effective to a great extent because the students were able to successfully accomplish the goals and objectives of all three units. Having taken this course, the

participants can write emails replying to stakeholders' requests about sales and purchases, financial audit reports, and marketing proposals. Furthermore, the students are able to use effective public speaking strategies in order to engage with stakeholders in a business meeting environment. Another conclusion drawn from this study is that the students perceived the course as very relevant to their professional field. These were the parameters that were set to prove this course effectiveness; however, there is a call for future research to follow up on the progression of the students' careers to see the level of impact that this course will have on their professional performance. As a pedagogical implication, given that this course was created based on real-life tasks that students need to carry out in their fields, and because they were satisfied by the end of the course, we can also conclude that this study supports the statement that learners are motivated when they encounter real-world situations and contexts in the classroom (Coombe et al., 2007). This study is significant because it provides a way to assess the type of reactions and performance of a particular group of students of business administration and public accounting when provided with an ESP course that follows the TBLT approach. We hope that other professionals in the English field can take this as a guide to assess English for Business Administration courses and improve them for the sake of designing effective courses, which will definitely benefit students from various fields.

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Appendices

Appendix A: Stakeholders' questionnaire

Universidad de Costa Rica
 Posgrado en la Enseñanza del Inglés como Lengua Extranjera
 Arguedas, Cervantes, Gómez

Business Administration - Stakeholders

El fin de este cuestionario es conocer las situaciones y contextos laborales en los que egresados de la carrera administración de empresas y personas que trabajan en esta área utilizan el inglés.

Parte 1. Información Personal. Complete la siguiente información.

1. Dirección de correo electrónico

2. Nombre Completo

3. Puesto de trabajo

4. ¿Es graduado de la carrera Administración de empresas?

_____ Sí

_____ No, soy estudiante de administración de empresas.

_____ No, no estudio ni soy egresado de administración de empresas.

5. ¿Considera que el inglés es necesario para su área de trabajo?

_____ Sí

_____ No

Parte 2. Uso de inglés como estudiante

Responder las preguntas de esta sección según su experiencia cuando era estudiante de la carrera administración de empresas o a fin.

1. Cuando era estudiante de la carrera, ¿usaba el inglés para fines académicos?

_____ Sí

_____ No

2. ¿En general, con qué frecuencia utiliza el inglés?

- Mucha
 Regular
 Poca
 Nada

3. ¿Con qué frecuencia utiliza el inglés para HABLAR?

- Mucha
 Regular
 Poca
 Nada

4. ¿Con qué frecuencia utiliza el inglés para ESCRIBIR?

- Mucha
 Regular
 Poca
 Nada

5. ¿Con qué frecuencia utiliza el inglés para LEER?

- Mucha
 Regular
 Poca
 Nada

6. ¿Con qué frecuencia utiliza el inglés para ESCUCHAR?

- Mucha
 Regular
 Poca
 Nada

7. ¿De qué manera estaba expuesto a los siguientes temas en INGLÉS? Si no tuvo contacto con el tema, escoja la opción "No uso el inglés para este tema"

	Lo leía en Inglés	Lo escuchaba (Audio o Video) Inglés	Lo escribía Inglés	Lo hablaba Inglés	No use el inglés para este tema
Administración de negocios (Business Administration)					
Economía (Economy)					

Administración de proyectos (Project Management)					
Análisis de datos (Data Analysis)					
Toma de decisiones (Decision Making)					
Finanzas (Finances)					
Operaciones financiera (Finance Operations)					
Estadística (Statistics)					
Legislación empresarial (Corporate Law)					
Legislación comercial (Commerce Law)					
Legislación laboral (Labor Law)					
Legislación bancaria (Banking Law)					
Legislación financiera (Finance Law)					
Legislación tributaria y aduanera (Tax and Customs Law)					
Mercadeo (Marketing)					
Mercadeo Digital (Digital Marketing)					
Gerencia de personal (People Management)					
Gestión del talento humano (Talent and Development)					

Comercio internacional (International Commerce)					
Publicidad y promoción (Advertising and Promotion)					
Emprendimiento (Entrepreneurship)					
Ventas (Sales)					
Liderazgo (Leadership)					
Evaluación de proyectos (Project Quality)					
Innovación (Innovation)					
Mercados Bursátiles (Stock Market)					
Auditoría Financiera (Financial Audit)					
Investigación de mercados (Market Research)					
Tácticas de negociación (Negotiation Tactics)					
Mercados financieros internacionales (International Finance Market)					
Comportamiento del consumidor (Consumer behavior)					
Sistema económico (Economic System)					

Mejora de procesos (Process Improvement)					
Recursos Humanos (Human Resources)					
Análisis de datos (Data analytics)					

Parte 3. Uso del inglés en el trabajo.

Responder las preguntas de esta sección según su experiencia laborando en el área de administración de empresas.

1. Actualmente, ¿Usa el inglés en su trabajo?

Sí

No

2. ¿Para qué utiliza inglés en su trabajo?

Hablar

Escribir

Leer

Escuchar

3. ¿Con qué frecuencia utiliza inglés para HABLAR?

Mucha

Regular

Poca

Nada

4. ¿Con qué frecuencia utiliza inglés para ESCRIBIR?

Mucha

Regular

Poca

Nada

5. ¿Con qué frecuencia utiliza inglés para LEER?

Mucha

Regular

Poca

Nada

6. ¿Con qué frecuencia utiliza inglés para ESCUCHAR?

Mucha

Regular

_____ Poca
 _____ Nada

7. ¿Con qué frecuencia utiliza inglés en general?

_____ Mucha
 _____ Regular
 _____ Poca
 _____ Nada

8. ¿Qué tan seguido utiliza el inglés para las siguientes actividades?

	Mucho Regular	Poco	Nada	No realizo esta actividad
Hablar cara a cara				
Leer correos electrónicos				
Leer documentos				
Escuchar conferencias				
Escribir correos electrónicos				
Escribir documentos				
Coordinar reuniones y conferencias				
Conducir reuniones y conferencias				
Aprender en capacitaciones				
Enseñar en capacitaciones				
Escuchar reuniones en inglés para tomar notas en español				
Escuchar reuniones en inglés para tomar notas en inglés				
Negociar acuerdos				
Dar y recibir retroalimentación				
Vender productos o servicios				
Dar servicio al cliente				
Escribir revisiones anuales				
Escribir reportes financieros				
Comunicar problemas y soluciones				
Leer revisiones anuales				
Leer reportes financieros				
Escribir propuestas de mejora				

Leer propuestas de mejora				
Leer políticas				
Leer términos y condiciones				

9. Al INICIO de mi carrera laboral, lo que más se me dificultaba era:

- Hablar en inglés
 Escribir en inglés
 Entender al escuchar el inglés
 Leer en inglés

10. Al INICIO de mi carrera laboral, lo que más se me facilitaba era:

- Hablar en inglés
 Escribir en inglés
 Entender al escuchar el inglés
 Leer en inglés

11. En este momento lo que más se me dificulta es:

- Hablar en inglés
 Escribir en inglés
 Entender al escuchar el inglés
 Leer en inglés

13. En este momento, lo que más fácil se me hace es:

- Hablar en inglés
 Escribir en inglés
 Entender al escuchar el inglés
 Leer en inglés

14. En general, ¿qué tan seguido utiliza los siguientes medios en inglés para obtener información relacionada a su área de trabajo?

	Nada	Poco	Regular	Mucho
Videos en Internet				
Televisión				
Correos electrónicos				
Libros				
Artículos Académicos				
Revistas				
Páginas en Internet				
Redes sociales (Twitter, Facebook, LinkedIn, otros)				
Políticas o leyes				
Wikis				

Cursos en línea				
Conferencias				

Appendix B: Students' questionnaire 1

Universidad de Costa Rica
 Posgrado en la Enseñanza del Inglés como Lengua Extranjera
 Arguedas, Cervantes, Gómez

Business Administration – Cuestionario para estudiantes

El fin de este cuestionario es conocer el tipo de tareas que requieren el uso del inglés que realizan las personas en un puesto de administración de negocios.

1. Mencione tareas que involucran leer en inglés. Por ejemplo: Entender los puntos más importantes detallados en un contrato.

2. Mencione tareas que involucran escribir en inglés. Por ejemplo: Escribir correos electrónicos para agendar una reunión.

3. Mencione tareas que involucran escuchar en inglés. Por ejemplo: Escuchar para identificar los acuerdos discutidos en una reunión.

4. Mencione tareas que involucran hablar en inglés. Por ejemplo: Presentar de forma oral un informe financiero a una junta directiva.

Appendix C: Students' questionnaire 2

Universidad de Costa Rica
 Posgrado en la Enseñanza del Inglés como Lengua Extranjera
 Arguedas, Cervantes, Gómez

Business Administration - Cuestionario para estudiantes

El objetivo de este cuestionario es recoger información para diseñar un curso de inglés con fines específicos para los estudiantes de la carrera de Administración de Negocios de la Universidad de Costa Rica. Este proyecto es un requisito para completar el programa de Posgrado en la Enseñanza del Inglés como Lengua Extranjera. Además, se pretende conocer los contextos en los que los estudiantes utilizan el inglés. La información recolectada será confidencial.

Parte 1. Información Personal. Complete la siguiente información.

1. Nombre: _____
2. Teléfono: _____
3. Correo: _____
4. Edad: _____
5. Actualmente trabaja: Sí ___ No ___
6. Puesto de trabajo: _____

* En puesto de trabajo, si no trabaja, indicar No trabajo.

Parte 1.2 Puesto de trabajo

1. Seleccione los puestos de trabajo en los que podría trabajar luego de graduarse

- _____ Gerente comercial
- _____ Director general
- _____ Gerente de operaciones
- _____ Gerente de proyectos
- _____ Gerente de finanzas

- _____ Analista financiero
- _____ Analista de datos
- _____ Auditor
- _____ Supervisor de calidad
- _____ Administrador de recursos humanos
- _____ Gerente de negocios
- _____ Emprendedor
- _____ Otra...

Parte 2. Uso de inglés en la actualidad

A. Responda las siguientes preguntas según su contacto con el inglés.

1. ¿Por cuántos años ha estudiado inglés?

- _____ 1 año
- _____ 2 a 3 años
- _____ 4 a 5 años
- _____ 6 años o más

2. Si alguna vez ha llevado algún curso formal de inglés, ¿Qué niveles cursó?

- _____ principiante
 - _____ intermedio
 - _____ avanzado
 - _____ nunca he llevado un curso de inglés
- Dé algún detalle sobre el curso

3. Lea cuidadosamente las siguientes descripciones de niveles de inglés. ¿Cuál cree usted que es su nivel de inglés?

- _____ Básico (bajo): Sabe algunas palabras y expresiones fijas; no puede manejar conversaciones de diferentes temas; responde a preguntas y respuestas en algunos temas; vocabulario, gramática y conocimiento de frases idiomáticas muy limitado; pronunciación fuertemente influenciada por lengua materna.
- _____ Básico (alto): Sabe un número limitado de palabras y expresiones; capaz de manejar limitadas, conversaciones cortas en algunos temas predecibles; conocimiento a nivel de supervivencia de vocabulario, gramática, y frases idiomáticas; pronunciación fuertemente influenciada por lengua materna.

- _____ Intermedio (bajo): Fluidez razonable en un rango restringido de temas, pero dificultad fuera de un rango limitado de temas; muchos problemas con palabras, frases idiomáticas, gramática y pronunciación.
- _____ Intermedio (alto): Puede manejar cómodamente situaciones familiares con temas familiares, aunque todavía con algunas dificultades con vocabulario, modismos, gramática y pronunciación.
- _____ Avanzado: Capaz de conversar fluidamente y naturalmente en la mayoría de temas; poca dificultad con vocabulario, modismos, gramática y pronunciación.

B. ¿Con qué frecuencia utiliza el inglés con fines académicos? Marque con una X la casilla correspondiente.

	Una vez a la semana	Dos veces a la semana	Tres veces a la semana	Cuatro o más veces a la semana
1. HABLAR				
2. ESCRIBIR				
3. LEER				
4. ESCUCHAR				

5. En el ámbito académico ¿En cuáles situaciones necesita hablar en inglés y con quién?

6. En el ámbito académico ¿Qué necesita usted escribir en inglés? ¿Por qué es necesario que usted sepa escribir correctamente en inglés?

7. En el ámbito académico ¿Qué necesita usted leer en inglés? ¿Por qué debe leer en inglés?

8. En el ámbito académico ¿Para qué fin escucha inglés?

C. ¿De qué manera está expuesto a los siguientes temas en INGLÉS? Si no está en contacto con el tema, escoja la opción "No uso el inglés para este tema"

Marque con una X la casilla correspondiente

	Lo lee en inglés	Lo escucha (Audio o Video) inglés	Lo escribe inglés	Lo habla inglés	No uso el inglés para este tema
1. Administración de negocios (Business Administration)					
2. Economía (Economy)					
3. Análisis de datos (Data Analysis)					
4. Toma de decisiones (Decision Making)					
5. Finanzas (Finances)					
6. Operaciones financiera (Finance Operations)					
7. Estadística (Statistics)					
8. Legislación empresarial					
9. Legislación tributaria y aduanera (Tax and Customs Law)					
10. Mercadeo (Marketing)					
11. Gerencia de personal (People Management)					

12. Gestión del talento humano (Talent and Development)					
13. Comercio internacional (International Commerce)					
14. Publicidad y promoción (Advertising and Promotion)					
15. Emprendimiento (Entrepreneurship)					
16. Ventas (Sales)					
17. Liderazgo (Leadership)					
18. Evaluación de proyectos (Project Quality)					
19. Mercados Bursátiles (Stock Market)					
20. Auditoria Financiera (Financial Audit)					
21. Investigación de mercados (Market Research)					
22. Tácticas de negociación (Negotiation Tactics)					
23. Mercados financieros internacionales (International Finance Market)					
24. Comportamiento del consumidor (Consumer behavior)					
25. Sistema económico (Economic System)					
26. Mejora de procesos (Process Improvement)					
27. Recursos Humanos (Human Resources)					
28. Análisis de datos (Data analytics)					
29. Otros. Indique cuál o cuáles					

Parte 3. Uso del inglés en el futuro, laborando en administración de negocios. Marque con una X la casilla correspondiente

A. Indique qué tan necesario es cada destreza de inglés en su campo laboral.

	Muy necesario	Necesario	Poco necesario	No es necesario
1. HABLAR				
2. ESCRIBIR				
3. LEER				
4. ESCUCHAR				

B. ¿Con qué frecuencia realizaría las siguientes actividades en inglés, laborando en administración de negocios?

Actividades de lectura	A diario	Semanalmente	Mensualmente	Una o dos veces al año	No creo realizar esta actividad
Leer estados financieros					
Leer correos electrónicos de solicitudes de clientes					
Leer documentos legales aportados por clientes que laboran en el extranjero y que solicitan productos financieros en el país					
Leer requerimientos técnicos de proyectos del área					
Leer informes de auditoría					
Leer manuales para entender procesos de la organización					
Leer noticias de mercado para analizar nuevas tendencias					
Otra: _____ _____					

Actividades de escritura	Una vez a la semana	Dos veces a la semana	Tres veces a la semana	Cuatro o más veces a la semana	No creo realizar esta actividad
Escribir correos electrónicos a proveedores de servicios					

Presentar un proyecto de forma escrita					
Redactar estados financieros					
Escribir artículos de prensa					
Dar respuesta escrita a consultas de clientes					
Otra: _____ _____					

Actividades de escucha y habla	Una vez a la semana	Dos veces a la semana	Tres veces a la semana	Cuatro o más veces a la semana	No creo realizar esta actividad
Reuniones con clientes potenciales					
Verificar vía telefónica solicitudes de clientes					
Hablar sobre procesos implementados con directores y gerentes					
Llamar a clientes para comunicar las resoluciones sobre quejas presentadas.					
Escuchar noticias sobre temáticas empresariales					
Otra: _____ _____					

Parte 4. Dificultades con el uso del inglés

1. A la hora de HABLAR en inglés ¿qué es lo que más se le dificulta?

2. A la hora de LEER en inglés ¿qué es lo que más se le dificulta?

3. A la hora de ESCRIBIR en inglés ¿qué es lo que más se le dificulta?

4. A la hora de ESCUCHAR en inglés ¿qué es lo que más se le dificulta?

Parte 5. Preferencias de Aprendizaje

1. ¿En qué tipo de inglés preferiría que nos enfoquemos en el curso?

En el inglés que necesito como estudiante

En el inglés que necesitaré laborando

A. ¿Qué tanto le gustaría que se practique cada destreza en este curso?
 Marque con una X la casilla correspondiente.

	Mucho	Poco	Nada
1. Hablar en inglés			
2. Escribir en inglés			
3. Leer en inglés			
4. Escuchar en inglés			

B. ¿Cuáles son las tres actividades que más le gustaría practicar en este curso?

Eg: *Escribir reportes financieros en inglés.*

—

—

C. ¿Cuáles serían los tres temas más relevantes relacionados con la administración de negocio que le gustaría que se incluyeran en el curso?
 Eg: *Investigación de mercados.*

—

D. En una clase de inglés ¿De qué manera prefiere trabajar en clase?

Individual

Grupos

Ambas

E. ¿Cuáles de estos tipos de actividades le gustaría que se hicieran en el curso?

Comprensión de lectura

- Lecturas grupales
- Discusión con toda la clase
- Simulaciones
- Presentaciones orales
- Juegos didácticos
- Prácticas escritas
- Debates

F. ¿Hay alguna otra actividad que le gustaría que se incluya en el curso?

Muchas gracias por su colaboración.

Appendix D: Students' questionnaire 3

Universidad de Costa Rica
 Posgrado en la Enseñanza del Inglés como Lengua Extranjera
 Arguedas, Cervantes, Gómez

Estilos de Aprendizaje y Actitudes

Parte 1. Estilos de Aprendizaje

1. Lea la siguiente información sobre estilos de aprendizaje e indique cuál considera más similar a la manera en la que aprende.

___ Visual: Relaciono el aprendizaje con ver y leer. Prefiero leer que escuchar. Capto grandes cantidades de información solo mirando. Pienso en imágenes y visualizar en detalle. Realizo resúmenes y esquemas, subrayo y escribo en los márgenes de los libros, siempre tomo apuntes en clase. Tomo fotos o vídeos a los eventos importantes dentro las clases.

___ Auditivo: Relaciono el aprendizaje con hablar y escuchar. Prefiero escuchar que leer. Me gusta leer en voz alta. Aprende mejor mediante explicaciones orales. Grabo o busco audios para estudiar. Sigo instrucciones orales eficientemente.

___ Kinestésico: Relaciono el aprendizaje con tocar y hacer. Prefiero aprender haciendo por mí mismo, por ejemplo, proyectos o experimentos de laboratorio. Necesito moverme durante la clase. Cuando estudio, muchas veces siento la necesidad de levantarse o caminar. Aprendo actividades manuales y técnicas con facilidad.

2. Si considera que su forma de aprender se ve reflejada en dos categorías, indique la segunda en esta pregunta.

___ Visual

___ Auditivo

___ Kinestésico

___ No considero que mi forma de aprender se refleja en dos categorías.

3. Mencione actividades, recursos didácticos o estrategias que considera que mejoran su proceso de aprendizaje.
-

Parte 2. Actitudes hacia el inglés

1. Del 1 al 10, ¿Qué tanto le gusta el inglés?

No me gusta en lo absoluto

___ 1

___ 2

___ 3

___ 4

___ 5

- _____ 6
- _____ 7
- _____ 8
- _____ 9
- _____ 10

Me gusta mucho

2. ¿Qué tan importante considera que es aprender inglés en este momento?

No es importante

- _____ 1
- _____ 2
- _____ 3
- _____ 4
- _____ 5
- _____ 6
- _____ 7
- _____ 8
- _____ 9
- _____ 10

Es muy importante

3. ¿Qué tan importante considera que es saber inglés en su ámbito profesional?

No es importante

- _____ 1
- _____ 2
- _____ 3
- _____ 4
- _____ 5
- _____ 6
- _____ 7
- _____ 8
- _____ 9
- _____ 10

Es muy importante

4. ¿Cuál es su nivel de motivación con respecto a llevar un curso de inglés especializado en su área de estudio?

Bajo

- _____ 1
- _____ 2
- _____ 3
- _____ 4
- _____ 5
- _____ 6

____ 7
____ 8
____ 9
____ 10
Alto

5. Describa cómo ha sido su experiencia aprendiendo inglés incluyendo detalles como dónde y cómo lo ha ido aprendiendo.

Appendix E: Students' interview

Universidad de Costa Rica

Posgrado en la Enseñanza del Inglés como Lengua Extranjera

Arguedas, Cervantes, Gómez

Name:

1. ¿Cuál es el nombre de la empresa donde usted labora?
2. ¿Qué funciones específicas desempeña donde trabaja y que requieren inglés?
3. Si lee noticias en inglés sobre temas relacionados a administración de empresas, ¿de dónde lo lee? ¿De qué medios?
 3. ¿Nos podría facilitar documentos que utilice en su día a día en inglés? dónde trabaja? Por ejemplo, correos, estados financieros o documentos en general que utilice en inglés. Puede compartirlos eliminando información confidencial que puedan tener, o bien, puede compartir la versión original y nosotros eliminaremos toda información sensible antes de utilizarla.

Appendix F: Stakeholder' interview

Entrevista - Stakeholder

Nombre:

Correo electrónico:

1. ¿En general, qué funciones realiza una persona que trabaje en administración de empresas?
2. ¿En la carrera de administración de empresas, se llevan cursos de inglés?
3. En la carrera, les dan algún curso en donde tengan que crear un producto o un servicio Podríamos tener acceso a las instrucciones y/o guías?
4. ¿En la carrera, se llevan materias de administración que sean impartidas en inglés?
5. ¿Qué nivel de inglés espera una compañía de una persona que quiera trabajar en el área de administración de empresas?
6. ¿Qué tan importante es que estudiantes de administración de empresas dominen el inglés?
7. ¿Qué tan importante es que personas que laboren en administración de empresas dominen el inglés?
8. ¿Qué funciones realiza una persona trabajando en administración de empresas que requieran hablar en inglés? Con quién hablan? Para qué?
9. ¿Qué funciones realiza una persona trabajando en administración de empresas que requieran escribir en inglés? Para qué escribe? A quién?
10. ¿Qué funciones realiza una persona trabajando en administración de empresas que requieran leer en inglés. Para qué lee? Qué lee?
11. ¿Qué funciones realiza una persona trabajando en administración de empresas que requieran escuchar en inglés? Para qué?
12. ¿Si una persona que está trabajando en administración de empresas tiene que desarrollar una propuesta de un proyecto en inglés, sobre qué sería ese proyecto? ¿Qué tema? ¿Qué partes incluiría esa propuesta?
13. ¿Qué función que requiera inglés es la que más se le dificulta a una persona que trabaja en el campo de administración?
14. Entre hablar, escuchar, leer y escribir, ¿cuál sería la destreza que motivaría más a estudiantes de administración a tomar cursos de inglés?
15. ¿Normalmente, cuando lee noticias o similares sobre negocios, de qué medios los toma? Internet? ¿Qué página específicamente?
16. ¿Nos podría compartir material que estudiantes de administración utilicen durante la carrera en inglés?
17. Nos podría compartir documentos en inglés como:
 - a. Reporte de auditoria
 - b. Reporte de finanzas
 - c. Reporte de comercio

- d. Proyecto de mercadeo
- e. Reportes de ventas
- f. Correos con clientes sobre solicitudes
- g. Correo con jefaturas
- h. Artículos sobre auditoría, finanzas, mercadeo o comercio.

Appendix G: Student-version of the syllabus

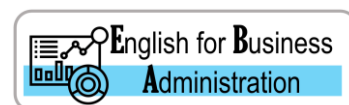
University of Costa Rica

Master's program

Instructors: A. Arguedas, L. Cervantes, L. Gomez

Schedule: Wednesday 1700h - 1900h

Location: [Access Your Class By Clicking Here Zoom](#)



Course Description

This course follows an English for Specific Purposes modality. Our purpose is to teach university students English for their specific language features and communication strategies they will use during their professional careers. The focus of this course is to help students improve their ability to (a) handle business interactions via text and voice, (b) write and present the main components of an audit report to stakeholders, and (c) elaborate and present to stakeholders the product detail section of a marketing proposal. The lessons in this course are planned to take place online via Zoom. The EBA course will require two and a half hours per week, for 14 weeks. Each lesson will be taught on Wednesdays, from 5:00 P.M. to 7:30 P.M. Three instructors will be present in every class.

Methodology

This course includes both group and individual work for reading, writing, listening, and speaking. It includes activities such as email writing, reading comprehension, composition of business documents, role-play of business meetings, phone calls, and public speaking. Students are expected to attend to all classes and actively engage in all activities and assignments.

Assessment

Assessment		
Tasks	Description	Percentage
Phone call Role-play	Handle business interactions orally	20%
Project 1	Presenting the main components of an audit report to stakeholders	25%
Project 2	Presenting the product detail section of a marketing proposal.	25%
Portfolio	Compilation of each unit work: All completed activities during the course (15%) The email response to stakeholders. (5%) Written Audit report (5%) Written marketing proposal (5%)	30%
Total	100%	Passing Score: 80%

Contents

Unit 1: Managing Your Stakeholders

Goal: By the end of this course, students will be able to correctly produce written and oral replies to stakeholders' requests about sales and purchases of products in a formal business environment.

General Objectives: By the end of the unit, the students will be able to:

3. Adequately construct formal written replies to customer requests about purchases and sales by using appropriate structures, vocabulary, and register.
4. Adequately respond orally to stakeholders' requests about purchases and sales of products by using appropriate structures, vocabulary, and register.

Unit 2: Presenting Your Audits

Goal: By the end of this course, students will be able to successfully show understanding of audit evidence to write a financial audit report and present it in a face-to-face meeting.

General Objectives: By the end of the unit, the students will be able to

3. Accurately write the main parts of an audit report based on the company's internal policies and audit evidence by using appropriate structures, vocabulary, and register.
4. Appropriately explain orally an audit report in a face-to-face meeting by using pertinent correct structures and business-related vocabulary.

Unit 3: Presenting Your Marketing Strategy

Goal: By the end of this course, students will be able to successfully write a marketing mix section (product, price, place, and promotion) of a marketing proposal and present it during a marketing meeting with stakeholders.

General Objectives: By the end of the unit, the students will be able to:

3. Construct a marketing mix section by following business format standards and correct English grammar and vocabulary.
4. Successfully present a marketing mix in a meeting with stakeholders by using effective public speaking strategies and correct English grammar and vocabulary.

Appendix H: Observation Form

Observation Form

Date: _____ Unit: _____ Lesson: _____

Objective of the observation:

Instructions for the Observer:

Write in here events or details about students' ability to complete the tasks. Guiding questions:

- Do they make language mistakes that affect the completion of the main task?
- What type of mistakes do they make?
- What are the most common mistakes?
- Do they use Spanish constantly? How often?
- Are they able to complete the tasks? Why or why not?
- Do students get enough preparation to complete the task?

Write the context in which the mistakes happen (during individual work, during group work, in front of the class)

Comments on the preparation stages (tasks and pre-tasks)

Notes	Context

Comments on the completion of the main task

Notes	Context

Other events:

Appendix I: Unit Evaluation Form

Unit Evaluation Form

Read each item and provide an answer as requested.

Relevance to the field

a. Read each statement and rate how much you agree with it.

	Strongly disagree	Disagree	Agree	Strongly agree
1. The objectives of the unit are relevant to my profession.				
2. The contents of the unit are relevant to my profession.				
3. I learned useful technical English in this unit.				
4. My English has improved.				

b. Write your general comments about the unit usefulness. (Puede escribir su respuesta en español.)

c. What important words have you learned? (Puede escribir su respuesta en español.)

d. Do you think the goal for this unit was met? (Unit Goal: By the end of this course, students will be able to successfully show understanding of internal company policies and audit evidence to write a financial audit report and present it in a face-to-face meeting.)

Tasks and Materials

a. Read each statement and rate how much you agree with it.

	Strongly disagree	Disagree	Agree	Strongly agree
1. The instructions for the main tasks were clear.				
2. The difficulty level of the activities allowed me to improve.				
3. Activities were challenging.				
4. Activities were simple enough to complete.				
5. I enjoyed doing the activities.				
6. The unit materials were relevant to my field.				

b.

b. Write your general comments about the tasks and materials. (Puede escribir su respuesta en español)

c. Which activities do you consider have contributed to your learning process in this course?

Appendix J: Analytic Rubric for Email Evaluation

Analytic Rubric for Email Evaluation

Email Evaluation Rubric					
Aspect	Needs improvement 3-4	Fair 5-6	Good 7-8	Excellent 9-10	Points
Content	The comparison of the products and the purchase recommendation misses 5 or more relevant details	The comparison of the products and the purchase recommendation miss 3 or 4 relevant details.	The email includes a comparison of the products and a purchase recommendation but misses 1 or 2 relevant details.	The email includes a complete comparison of the products and a purchase recommendation.	
Organization	Most of the ideas in the email are not organized. There are no transitional words or phrases.	Some ideas of the email are not organized. Use of 1 correct transitional words or phrases.	Most of the email is properly organized. Use of 2 correct transitional words or phrases.	The email is properly organized. Use of 3 or more correct transitional words or phrases.	
Vocabulary	There were more than 8 word-choice errors that could cause misunderstandings There were several spelling mistakes.	There were 4-8 word-choice errors that could cause misunderstandings. There were several spelling mistakes.	There were 1-3 word-choice errors that could cause misunderstandings. There were a few spelling mistakes	There were no word-choice errors that could cause misunderstandings There were no spelling mistakes	
Punctuation and Grammar	Three or more punctuation or grammar errors.	Two punctuation or grammar errors.	One punctuation or grammar errors.	Zero punctuation or grammar errors.	
Comments:				Total Pts:	
				Score:	

Appendix K: Analytic Rubric for Role-play

Student's name:

	Needs improvement 3-4pts.	Fair 5-6pts.	Good 7-8pts.	Excellent 9 -10 pts.	Points obtained :
Content	The role-play did not include most of the sections required and missed several aspects regarding the terms of use of a bank.	The role-play did not include 1 or 2 of the sections required and missed 1 or 2 relevant aspects regarding the terms of use of a bank.	The role-play included all the sections required but missed one or two relevant aspects regarding the terms of use of a bank.	The role-play included all the sections required (greetings, meeting opener, etc.) and relevant information regarding the terms of use of a bank.	
Fluency	Several problems with the flow of ideas, hesitated most of the time, and pauses affected the clarity of ideas.	Some problems with the flow of ideas, some hesitation instances, somewhat effective use of pauses.	Good flow of ideas, few hesitation instances, and usually effective use of pauses.	Excellent flow of ideas, no hesitation, and effective use of pauses.	
Pronunciation	There were more than 8 pronunciation errors that could cause misunderstandings.	Pronunciation was often correct. There were 4-8 errors that could cause misunderstandings.	Pronunciation was correct most of the time. There were 1-3 errors that could cause misunderstandings.	Pronunciation was correct most of the time and it did not cause misunderstandings.	
Grammar	There were more than 8 grammar errors that could cause misunderstandings.	There were 4-8 grammar errors that could cause misunderstandings.	Grammar was effectively used most of the time. There were 1-3 errors that could cause misunderstandings.	Grammar was effectively used and there were no errors that could cause misunderstandings.	
Vocabulary	Vocabulary related to banking was not used during the task. There were more than 8 word-choice errors that could cause misunderstandings.	Vocabulary related to banking was used in a few instances. There were 4-8 word-choice errors that could cause misunderstandings.	Vocabulary related to banking was effectively used most of the time. There were 1-3 word-choice errors that could cause misunderstandings.	Vocabulary related to banking was effectively used. There were no word-choice errors that could cause misunderstandings.	

Additional comments:

Total pts: / Score:

Appendix L: Analytic rubric for audit written report

Student's name:

Audit written report evaluation Rubric					
Aspect	Needs improvement 3-4	Fair 5-6	Good 7-8	Excellent 9-10	Points
Content	Some sections of the report were not included (objective, scope, findings, and recommendations). A considerable amount of relevant information was missing in each of the sections.	The report included all the sections required (objective, scope, findings, and recommendations). Some sections missed relevant information.	The report included all the sections required (introduction, objective, scope, findings, and recommendations). Each section included most of the required information.	The report included all the sections required (introduction, objective, scope, findings, and recommendations). Each section was developed thoroughly and included the required information.	
Organization	Most of the ideas in the report are not organized. There are no transitional words or phrases.	Some ideas of the report are not organized. Use of 1 correct transitional words or phrases.	Most of the report is properly organized. Use of 2 correct transitional words or phrases.	The report is properly organized. Use of 3 or more correct transitional words or phrases.	
Vocabulary	There were more than 8 word-choice errors that could cause misunderstandings. There were several spelling mistakes.	There were 4-8 word-choice errors that could cause misunderstandings. There were several spelling mistakes.	There were 1-3 word-choice errors that could cause misunderstandings. There were a few spelling mistakes	There were no word-choice errors that could cause misunderstandings. There were no spelling mistakes	
Punctuation and Grammar	More than 10 punctuation or grammar errors.	7-10 Two punctuation or grammar errors.	4-7 punctuation or grammar errors.	1-3 punctuation or grammar errors.	
Comments:				Total Pts:	
				Score:	

Appendix M: Rubric for audit report oral presentation

Student's name:

	Needs improvement 3-4 pts.	Fair 5-6 pts.	Good 7-8 pts.	Excellent 9-10 pts.	Points obtained :
Content	Some sections of the presentation were not included (objective, scope, findings, and recommendations). A considerable amount of relevant information was missing in each of the sections.	The presentation included all the sections required (objective, scope, findings, and recommendations) . Some sections missed relevant information.	The presentation included all the sections required (objective, scope, findings, and recommendations). Each section included most of the required information.	The presentation included all the sections required (objective, scope, findings, and recommendations). Each section was developed thoroughly and included the required information.	
Fluency	Several problems with the flow of ideas, hesitated most of the time, and pauses affected the clarity of ideas.	Some problems with the flow of ideas, some hesitation instances, somewhat effective use of pauses.	Good flow of ideas, few hesitation instances, and usually effective use of pauses.	Excellent flow of ideas, no hesitation, and effective use of pauses.	
Pronunciation	There were more than 8 pronunciation errors that could cause misunderstandings.	Pronunciation was often correct. There were 4-8 errors that could cause misunderstandings .	Pronunciation was correct most of the time. There were 1-3 errors that could cause misunderstandings.	Pronunciation was correct most of the time and it did not cause misunderstandings .	
Grammar	There were more than 8 grammar errors that could cause misunderstandings.	There were 4-8 grammar errors that could cause misunderstandings .	Grammar was effectively used most of the time. There were 1-3 errors that could cause misunderstandings.	Grammar was effectively used and there were no errors that could cause misunderstandings .	
Vocabulary	Vocabulary related to auditing was not used during the task. There were more than 8 word-choice errors that could cause misunderstandings.	Vocabulary related to auditing was used in a few instances. There were 4-8 word-choice errors that could cause misunderstandings .	Vocabulary related to auditing was effectively used most of the time. There were 1-3 word-choice errors that could cause misunderstandings.	Vocabulary related to auditing was effectively used. There were no word-choice errors that could cause misunderstandings .	

Additional comments:

Total pts: / Score:

Appendix N: Analytic rubric for the marketing mix oral presentation

Student's name:

	Needs improvement 3-4 pts.	Fair 5-6 pts.	Good 7-8 pts.	Excellent 9-10 pts.	Points obtained :
Content	Some sections of the presentation were not included (product, price, place, and promotion). A considerable amount of relevant information was missing in each of the sections.	The presentation included all the sections required (product, price, place, and promotion). Some sections missed relevant information.	The presentation included all the sections required (product, price, place, and promotion). Each section included most of the required information.	The presentation included all the sections required (product, price, place, and promotion). Each section was developed thoroughly and included the required information.	
Fluency	Several problems with the flow of ideas, hesitated most of the time, and pauses affected the clarity of ideas.	Some problems with the flow of ideas, some hesitation instances, somewhat effective use of pauses.	Good flow of ideas, few hesitation instances, and usually effective use of pauses.	Excellent flow of ideas, no hesitation, and effective use of pauses.	
Pronunciation	There were more than 8 pronunciation errors that could cause misunderstandings.	Pronunciation was often correct. There were 4-8 errors that could cause misunderstandings.	Pronunciation was correct most of the time. There were 1-3 errors that could cause misunderstandings.	Pronunciation was correct most of the time and it did not cause misunderstandings.	
Grammar	There were more than 8 grammar errors that could cause misunderstandings.	There were 4-8 grammar errors that could cause misunderstandings.	Grammar was effectively used most of the time. There were 1-3 errors that could cause misunderstandings.	Grammar was effectively used and there were no errors that could cause misunderstandings.	
Vocabulary	Vocabulary related to marketing was not used during the task. There were more than 8 word-choice errors that could cause misunderstandings.	Vocabulary related to marketing was used in a few instances. There were 4-8 word-choice errors that could cause misunderstandings.	Vocabulary related to marketing was effectively used most of the time. There were 1-3 word-choice errors that could cause misunderstandings.	Vocabulary related to marketing was effectively used. There were no word-choice errors that could cause misunderstandings.	

Additional comments:

Total pts: / Score:

Appendix O: Analytic rubric for marketing mix written report

Student's name:

Marketing Mix Written Report Evaluation					
Aspect	Needs improvement 3-4	Fair 5-6	Good 7-8	Excellent 9-10	Points
Content	Some sections of the marketing mix were not included (product, price, place, and promotion). A considerable amount of relevant information was missing in each of the sections.	The marketing included all the sections required (product, price, place, and promotion). Some sections missed relevant information.	The marketing mix included all the sections required (product, price, place, and promotion). Each section included most of the required information.	The marketing mix included all the sections required (product, price, place, and promotion). Each section was developed thoroughly and included the required information.	
Organization	Most of the ideas in the report are not organized. There are no transitional words or phrases.	Some ideas of the report are not organized. Use of 1 correct transitional word or phrase.	Most of the report is properly organized. Use of 2 correct transitional words or phrases.	The report is properly organized. Use of 3 or more correct transitional words or phrases.	
Vocabulary	There were more than 8 word-choice errors that could cause misunderstandings. There were several spelling mistakes.	There were 4-8 word-choice errors that could cause misunderstandings. There were several spelling mistakes.	There were 1-3 word-choice errors that could cause misunderstandings. There were a few spelling mistakes.	There were no word-choice errors that could cause misunderstandings. There were no spelling mistakes.	
Punctuation and Grammar	More than 10 punctuation or grammar errors.	7-10 Two punctuation or grammar errors.	4-7 punctuation or grammar errors.	1-3 punctuation or grammar errors.	
Comments:				Total Pts: Score:	

Appendix P: Final Course Evaluation Form

Read each item and provide an answer as requested.

1. Relevance

A) Rate the following tasks based on how relevant they are for your future careers.

	1- Not relevant	2 - Somewhat relevant	3 - Relevant	4 - Very relevant
a. Writing an email comparing two technological devices to suggest a purchase decision				
b. Writing an email to answer stakeholder's requests				
c. Understanding the terms and conditions of banking services				
d. Responding to stakeholders' business requests related to banking services in a meeting				
e. Understanding an audit report and its main components				
f. Writing an audit report				
g. Presenting an audit report to a board of directors in a business meeting				
h. Understanding the main components of a marketing mix				
i. Writing a marketing mix				
j. Presenting a marketing mix in a business meeting				

B) In your opinion, which were the 3 most relevant tasks, and why?

C) In your opinion, which were the 3 least relevant tasks, and why?

2. List of language chunks

Instructions: Indicate per unit the language chunks that you learned during class.

- A) What phrases, expressions and vocabulary did you learn in Unit 1: Managing Your Stakeholders?

- B) What phrases, expressions and vocabulary did you learn in Unit 2: Presenting your audits?

- C) What phrases, expressions and vocabulary did you learn in Unit 3: Presenting Your Marketing Strategy?

Appendix Q: Focus group

As a group, discuss the following questions and use follow up questions when needed.

Ask all the questions for each unit.

Unit 1: Managing Your Stakeholders

Unit 2: Presenting your audits!

Unit 3: Presenting Your Marketing Strategy

Questions

1. Objectives - Were the objectives of this unit achieved? Why?
2. Tasks - Do you think the tasks were appropriate for the unit? Why?
3. Materials - Do you think the materials used during this unit were appropriate? Why?
4. Language - Was the vocabulary appropriate for the topic? Why?
 - a. Reading selection
5. Do you have any recommendations?

Appendix R: Lesson Plans and Materials

University of Costa Rica
 Master's Program in TEFL
 English for Business Administration
 Arguedas, Cervantes, Gómez

Date: August 12 Lesson Plan # 1

Student teacher: Luis Cervantes

Assistant/s: Lidia Gomez, Andrick Arguedas

Unit # 1: Title of unit: Managing Your Stakeholders



Unit Goal: : By the end of this course, students will be able to correctly produce written and oral replies to stakeholders' requests about sales and purchases of products in a formal business environment.

General Objective: At the end of the lesson, students will be able to write an email comparing two technological products based on official specifications found on the web to suggest a purchase decision to management.

Specific Objectives: The students will be able to

1. Appropriately share their preferences about communication channels.]
2. Accurately show understanding of technical vocabulary about purchases of products.
3. Accurately identify the pros and cons of two technological products based on online information.
4. Appropriately identify sequence, comparison, and contrast transitional words and phrases in an email to stakeholders about purchases of products.
5. Correctly write an email comparing two-conferencing products and providing a purchase recommendation.
6. Appropriately evaluate peers' email quality based on a rubric.

Objectives	Procedures	Language (Vocabulary, expressions, useful language, grammatical or phonetic features)	Strategies	Macro Skills	Time
1	<p>Warm-up: Your favorite communication channel?</p> <ol style="list-style-type: none"> 1. After reading the instructions in handout 1: Activity 1, in pairs Ss will be sent to Zoom breakout rooms to discuss about their 	<p>Vocabulary:</p> <ul style="list-style-type: none"> - Email - Over the phone - Face to face - Chat - Video Conference 	Expressing an opinion	S	10 min

	<p>favorite channel of communication (4 min).</p> <p>2. After this, they will share their answers in the Zoom main room with the class (6 min).</p> <p>Materials.</p> <p>1. Handout 1.1</p>	<p>Useful language:</p> <ul style="list-style-type: none"> - My favorite channel is _____ because _____. - I prefer _____ because _____. - In my opinion, the best option is _____ because _____. - _____ is better, because _____. - _____ is better than _____ because _____. - One of the advantages of _____ is _____. 			
2	<p>Pre-task 1: What do we know?</p> <ol style="list-style-type: none"> 1. In pairs and using handout 1: Activity 2, Ss will try to predict the meaning of highlighted words and phrases in a text. 2. Then, Ss will look up the words and phrases using an online dictionary. They will also check if the definitions they wrote were correct. 	<p>Vocabulary:</p> <ul style="list-style-type: none"> -Product features: Pure-play, Codec, Mounted Frame, Intuitive, Interfaces Whiteboarding, Heavy-duty Scalable, Hardware, Software... <p>Useful language:</p> <ul style="list-style-type: none"> -What is the meaning of the word....? 	<p>Predicting the meaning of words</p> <p>Using online dictionaries to find the meaning of words</p>	R	20 min.

	<p>3. T will double-check the answers with the class by asking Ss to share their answers.</p> <p>4. A will be rotating between groups to answer any questions.</p>	<p>-This word means... -Do you know the meaning of this word? -It sounds like... -I think it means...</p>			
3	<p>Pre-task 2: Collect your information!</p> <ol style="list-style-type: none"> In groups and using handout 1.3, Ss will identify the pros and cons of two conferencing technological devices by completing an informational chart. A will be rotating between groups to answer any questions. T will double-check the Ss' answers with the class by asking them to share their answers. 	<p>Useful language:</p> <ul style="list-style-type: none"> -What is the answer to question...? -Is this correct? -Is this information in the paragraph? -Where is this in the text? 	Identifying key elements in a text	20 min.	
4	<p>Pre-task 3: Using the right transitions:</p> <ol style="list-style-type: none"> Using handout 1.4, students will read a list of sequence, comparison, and contrast transitional words and phrases and their definitions and examples. Then, Ss will highlight the sequence words and phrases in yellow, and highlight in green the comparison and contrast words and phrases. Using the sample email in handout 1.4, T will present the parts of an email. 	<p>Vocabulary:</p> <ul style="list-style-type: none"> -Whereas -On the other side -The only disadvantage -In contrast -First -Second -Furthermore -Finally 	Using transition words to list a sequence and show contrast	10 min.	

5	<p>Main Task: Composing your email. <i>Task:</i> Ss prepare to write their emails by using the information obtained from the previous tasks and the sample email from the previous task.</p> <p><i>Planning:</i> Individually and using Handout 1: Activity 5, Ss will write an email comparing two-conferencing products and providing a purchase recommendation directed to stakeholders based on official specifications found on a website.</p> <p><i>Reporting:</i> Ss share their email with the class by reading it aloud.</p>	<p>Vocabulary: -On the other side -The only disadvantage -In contrast -First -Second -Furthermore -Finally</p> <p>Useful language: -How do you write ___ in English? -Is this correct? -What does ___ mean?</p>	<p>Organizing ideas to write a structured text</p> <p>Connecting ideas using transitional words and phrases</p>	W	40 min.
6	<p>Post task: Peer feedback review:</p> <ol style="list-style-type: none"> 1. Ss will evaluate their peers' email using a checklist. Each student will share the evaluation with his or her peer and the teacher. 2. Each student will have 2 minutes to share their recommendations with the class orally. 	<p>Useful language: -In my opinion, ___ is better because... - ___ has more advantages. -The best option is ___ because of the following reasons...</p>		S	20 min.

Activity 1: Your Favorite Technological Device



Instructions:

You are meeting your manager or an employee for the first time. Role-play With your partners; ask each other the answer the following question. **You will have 4 minutes for this.**

1. **Since we are going to work together, we are going to need to communicate a lot. Could you tell me what your favorite channel of communication is and why?**

Examples of channels of communication:

- Email
- Over the phone
- Face to face
- Chat
- Video Conference

Useful language:

- My favorite channel is _____ because_____.
- I prefer _____ because_____.
- _____ is better, because_____.
- _____ is better than _____ because_____.
- One of the advantages of _____ is _____.

Type your answer here:

Example answer: I prefer email communication because it helps you remember what people say.

Activity 2: What do we know?

Instructions: In your company, you were asked to read information about Polycom and Webex conference equipment. You will need to make a purchase decision later. Complete the following steps to understand the texts.

1. In groups, read **Text 1** and **Text 2**.
2. With your peers, complete the chart below each text by **trying to predict** the meaning of the highlighted words. If you cannot predict the words, **use this online dictionary (<https://dictionary.cambridge.org/es/>) to look for the definitions.**
3. You will later share your answers with the class.



TEXT 2

Polycom RealPresence

Polycom is one of the most popular video-conferencing equipment businesses in the world. Polycom is the largest **pure-play** collaboration company with nearly 30 years of experience **under its belt**. You can understand why its video-conferencing options are so highly **sought after**. No other conferencing equipment is more popular than the Polycom RealPresence Group Series.

Polycom equipment comes in three models: the Group 310, Group 500, and Group 700. They all come with the Polycom Group microphone, EagleEye camera, power supply, cables, remote, and a **codec**. Some people say that Polycom cameras are the best in the world. Users have access to enterprise-grade video-conferencing capabilities, as well as high-quality audio and a number of collaboration features. These include:

1. EagleEye Producer – uses facial recognition technology to accurately follow all meeting participants, keeping them in the **frame**.
2. RealPresence Touch – a simple and intuitive touch screen that allows for simple one-touch calling and other helpful interfaces.
3. Polycom NoiseBlock – keeps background noise to a minimum, making it easy to hear everything participants say.
5. Polycom Pano – allows for **seamless** wireless sharing between four users at once, including annotating and **whiteboarding**.

The Polycom RealPresence Group Series is a **heavy-duty** option for an office that requires complicated video-conferencing equipment, and the price reflects that. You're going to be paying a lot, but you're going to get an incredible, comprehensive kit that will work perfectly for a long time.

Price: \$2,999 (Group 310), \$13,999 (Group 500), and \$16,999 (Group 700)

Pros:

- Incredible in-depth collaboration features
- Easily **scalable** to support multiple users.
- Built-in operability with popular video-conferencing software

Cons:

- VERY expensive



Adapted from: <https://tech.co/web-conferencing/best-video-conferencing-equipment#polycomrealpresence>

CHART 1: POLYCON

Instructions: With your peers, complete the chart below each text by **trying to predict** the meaning of the highlighted words. If you cannot predict the words, **use this online dictionary** (<https://dictionary.cambridge.org/es/>) to look for the definitions.

Word/Phrase	Meaning
Pure-play	
Under its belt	
Sought after	
Codec	
Frame	
Seamless	
White boarding	
Heavy duty	
Scalable	

TEXT 2

Cisco WebEx DX Series

As one of the most recognizable companies in the world, it's safe to say Cisco WebEx is a **good call** when it comes to finding the best video-conferencing equipment. Plus, as one of the few **brands** with its own video-conferencing software, you can expect seamless **performance** from its **hardware** and **software**. Some people say WebEx software is the best in the world.

The DX Series comes with two models: the Cisco WebEx DX70 and the Cisco WebEx DX80.

These models come with 14-inch and 23-inch screens respectively, and mounted cameras for easy communication. The cameras are not high quality. Both are built as an all-in-one desktop collaboration **hub** with HD video and audio, which could even replace your current phone **setup**. Take advantage of features like:

1. Intuitive Cisco WebEx Room operating system, which enables annotating and whiteboarding
2. One-button meeting entry.
3. Camera flexibility, for those visual aids that are on your desk
4. Compatibility with the Cisco Spark Board (DX80 only)

As far as individual video-conferencing equipment goes, the Cisco WebEx DX Series is one of the most complete ones. You can't beat the ease with which meetings and collaboration take place. The price is going to be indicative of these amazing features (particularly for individuals). That said, if you are looking for seamless communication between individual team members (and you already have a Cisco Spark Board), you cannot go wrong.

Price: \$3250 (DX70) and \$4490 (DX80)

Pros

- Hardware and software compatible with WebEx service
- Unique individual-to-individual collaboration tools
- Not too expensive.
- HDMI **input** for content sharing on Mac or PC

Cons

- Not too scalable.
- Not a room solution – more for individuals



Adapted from: <https://tech.co/web-conferencing/best-video-conferencing-equipment#polycomrealpresence>

CHART 2: CISCO WEBEX

Instructions: With your peers, complete the chart below each text by **trying to predict** the meaning of the highlighted words. If you cannot predict the words, **use this online dictionary** (<https://dictionary.cambridge.org/es/>) to look for the definitions.

Word/Phrase	Meaning
A good call	
Brands	
Performance	
Hardware	
Software	
Hub	
Setup	
Input	

Activity 3: Collect your information!

Instructions: Using the information on Text 1 and 2, answer the following questions you received from your stakeholders about the two-conferencing options. If the information is not available, write “Not Available”

	Polycom	Cisco
1. How many model options does it have?		
2. What devices does it come with?		
3. How is the video and audio quality?		
4. What software does it use?		
5. What is the price?		
6. What are some pros about this product?		
7. What are some cons about this product?		

Activity 4: Connecting Your Ideas!

Instructions:

1. **Read the following email** comparing two options of conferencing equipment that you received from a coworker. Answer the question below the text in your breakout rooms.

Dear stakeholders,

Please find below the comparison of the two conference equipment as requested. You can find my final purchase recommendation at the end of the email. In this email, I will be comparing **Avaya XT5000 Room System** with **Lifesize 4K Icon Series**.

First, I will mention the experience Avaya has. Avaya has a long history of developing high-quality video and audio conferencing equipment. This means it has had plenty of time to get it right. **On the other side**, **Lifesize** has experience in multiple technological equipment. This means that they have more variety but less specialization.

Second, I will review the price. Avaya's equipment costs \$8000, whereas **Lifesize** is only \$2,999. **Furthermore**, regarding its kit, **Avaya** comes with five different cameras and microphones. **On the other hand**, **Lifesize** comes with only one **Lifesize Phone HD**, a video-conferencing software, and one camera.

Finally, let me tell you about the pros and cons of each option. **Avaya's** pros are the easy content sharing with dual-screen capabilities, clear picture and impressive audio, and easy-to-use interface for any meeting participant. The only disadvantage would be the complicated setup beyond camera and codec mounting. **In contrast**, **Lifesize** advantages are the hardware and software compatibility with **Lifesize Cloud**, sleek and stylish design that makes it easy to place and store cameras, and the several options with 4K compatibility. The cons are that it can be considered too expensive considering the limited equipment it contains.

In conclusion, I recommend purchasing the **Avaya XT5000 Room System** due to its vast equipment, high-quality video, and affordable price.

Regards,
Roberta Cordoba
General Manager

Question 1:

- What do the highlighted words have in common? What are their function in the text?

Type your answer here:

Useful language:

- What they have in common is that...
- They are all.....
- I think this is.....

Activity 5: Composing your Email!

Instructions:

1. You are now required to send an email to your stakeholders comparing **Polycom** and **Cisco** conferencing equipment. Please use the information you gathered in Activity 3.
2. They also expect you to provide a recommendation with the best option to purchase. Write the email following the instructions below.

1. Open this folder:
https://docs.google.com/document/d/1EvWnLsCXGs5AodKpvQtU1pbYF_Q8Mzb1jsrIVYpjMj0/edit
2. Find the file with your name.
3. Write your email there. Do not complete the evaluation part.

University of Costa Rica
 Master's Program in TEFL
 English for Business Administration
 Arguedas, Cervantes, Gómez

Date: August 19th Lesson Plan # 2
 Student teacher: Andrick Arguedas
 Assistant/s: Lidia Gomez
 Unit # 1: Title of unit: Managing Your Stakeholders



Unit Goal: : By the end of this course, students will be able to correctly produce written and oral replies to stakeholders' requests about sales and purchases of products in a formal business environment.

General Objective: At the end of the lesson, students will be able to construct a formal written response to stakeholders' requests about purchases and sales in an online marketplace.

Specific Objectives: The students will be able to

1. Identify important details about a product using online resources.
2. Show understanding of a company's terms of use.
3. Identify the parts of an email and their organization according to formal business standards.
4. Show understanding of stakeholder's request.
5. Write an email response to a stakeholder's request following a company's terms and policies.

Objectives	Procedures	Language	Strategies	Macro Skills	Time
1	<p>Warm-up: Introducing Alibaba.com</p> <ol style="list-style-type: none"> 1. In a Zoom breakout room, groups of 3 Ss will have 5 minutes to find as much information as they can about the website alibaba.com in Google. 2. After this, Ss will share their findings orally with the rest of the class. 	<p>Vocabulary: Technical vocabulary (B2B, B2C, C2C, marketplace, assurance program)</p> <p>Useful language: -What did you find? -Do know about this company?</p>	Finding information on the web	S and R	10 min

	<p>3. T will listen to their information, provide feedback if needed, and check the information that Ss found.</p> <p>Materials: Google slides presentation, Page 2: https://docs.google.com/presentation/d/14L00MIUL5Eui1Tu7rA1hJsNZ1AHY1WLZ96YbwQ0ygT0/edit#slide=id.g90332fc98b0_273</p>	<p>-It says in here that it is... -Can you share the screen?</p>		
2	<p>Pre-task 1</p> <ol style="list-style-type: none"> 1. Individually, Ss will go to the link https://edpuzzle.com/media/5f39aea004c3953f1d129e72, watch a video about Alibaba.com, and answer a series of questions based on information from the video. 2. Once Ss finish with the exercise, T will check their answers. <p>Materials:</p> <ol style="list-style-type: none"> 1. Google slides presentation pp. 3 and 4 2. Edpuzzle activity: https://edpuzzle.com/media/5f39aea004c3953f1d129e72 	<p>Vocabulary Technical vocabulary: Trademark, sourcing, World Bank, exports, value chain.</p>	<p>Listening for specific details</p>	<p>L and S</p> <p>10 Min</p>
2	<p>Pre-task 2</p>	<p>Vocabulary.</p>	<p>Scanning</p>	<p>R and S</p> <p>20 min</p>

	<p>1. In the main room, Ss will take turns to read aloud the Terms of Use of Alibaba.com. While Ss read, T will monitor their pronunciation and provide feedback after they finish reading.</p> <p>2. Using handout _____, Ss will be sent to breakout rooms in groups of 3 to complete a true and false exercise about the company's Terms of Use.</p> <p>3. After this, T will share the answers on the screen and check them with the rest of the class</p> <p>Materials:</p> <ol style="list-style-type: none"> 1. Google slides presentation pp. 6, 7, and 8. 2. Handout 1, pp. 1 and 2 	<p>Technical vocabulary (Fulfill, liability, preferences, scheme, termination...)</p> <p>Useful vocabulary:</p> <ul style="list-style-type: none"> -Is this statement true or false? -Where can you find this information? -I think it is ___ because.... 			
3	<p>Pre-task 3: Parts of an Email</p> <ol style="list-style-type: none"> 1. T will share a sample email request on the screen. 2. Taking turns, Ss will label the parts of the sample email accordingly (salutation, closing, etc.) 3. Then, T will review the organization of the parts of an 	<p>Vocabulary Parts of an email (Salutation, introduction, body, closing, signature)</p>	Following formal email standards	R and S	5 min

	<p>email and clarify any doubts or questions about it.</p> <p>Materials:</p> <ol style="list-style-type: none"> Mimio Studio presentation. Page 1 				
4	<p>Pre-task 4: Understanding Stakeholders' requests</p> <ol style="list-style-type: none"> T will share the sample email on the screen again. Ss will be asked to identify 3 requests within the email. Ss will use the annotation tools to circle the parts of the email in which requests are made. After Ss identify the 3 requests, T will exemplify other ways in which Ss can identify stakeholders' requests in an email. <p>Materials:</p> <ol style="list-style-type: none"> Mimio Studio presentation. Page 2 	<p>Grammar:</p> <p>Wh-questions (what are some of the risks that...)</p>	<p>Identifying specific requests</p>	R and S	10 min
5	<p>Main task: Replying to stakeholders' requests</p> <ol style="list-style-type: none"> Individually, Ss will write an email replying to the requests of the sample email. They will be sent to breakout rooms to help each other. T will present useful language Ss can use to write the email. 	<p>Vocabulary:</p> <p>Replying to requests (Hello/ dear _____, I am happy to help with your request, I will gladly answer your questions, I would like to start by answering your question about....,</p>	<p>Being polite</p>	W	45 min

Handout 1

1. **Pre-task 2.** Read the following text.

Terms of Use

Part A: New version - effective as of May 6th, 2020

PLEASE READ THESE TERMS AND CONDITIONS CAREFULLY!

7. Transactions Between Buyers and Sellers

7.1 Alibaba.com provides electronic web-based platforms for exchanging information between buyers and sellers of products and services. Alibaba.com additionally provides electronic web-based transaction platforms for Members to place, accept, conclude, manage and fulfill orders for the provision of products and services online within the Sites subject to the terms of the Transaction Services Agreement. However, for any Services, Alibaba.com does not represent either the seller or the buyer in specific transactions. Alibaba.com does not control and is not liable or responsible for the quality, safety, lawfulness or availability of the products or services offered for sale on the Sites, the ability of the sellers to complete a sale or the ability of buyers to complete a purchase.

7.2 Users are hereby made aware that there may be risks of dealing with people acting under false pretences. Alibaba.com uses several techniques to verify the accuracy of certain information our paying Users provide us when they register for a paying membership service on the Sites. However, because user verification on the Internet is difficult, Alibaba.com cannot and does not confirm each User's purported identity (including, without limitation, paying Members). We encourage you to use various means, as well as common sense, to evaluate with whom you are dealing.

7.3 Buyers and sellers accessing or using the Sites or Services shall assume the risks of conducting any purchase and sale transactions in connection with or through the Sites or Services. Buyer and sellers accessing or using the Site or Services shall also fully assume all risks of liability or harm of any kind arising out of or in connection with any subsequent activity relating to the products or services that are the subject of the transactions on the Sites. Examples of such risks shall include, but are not limited to: mis-representation of products and services, fraudulent schemes, unsatisfactory product quality, defective or dangerous products, unlawful products, delay or default in delivery or payment, cost mis-calculations, transportation accidents. Nonetheless, if a seller does not meet the terms and conditions costs will be refunded.

7.4 User agrees to provide all information and materials as may be reasonably required by Alibaba.com in connection with your transactions conducted on, through or as a result of use of the Sites or Services. Alibaba.com has the right to suspend or terminate any User's account if the User fails to provide the required information and materials without liability for any losses or damages arising out of or in connection with such suspension or termination.

Adapted from: <https://rule.alibaba.com/rule/detail/2041.htm>

2. After reading the text **Terms of use**, choose true or false for the statements below. If the answer is false, justify your answer.

True and false

1. Alibaba.com functions as the face of the seller and buyer in specific transactions.	True	False	
2. Alibaba takes responsibility for the quality, safety, lawfulness or availability of the products or services offered for sale on the Sites, the ability of the sellers to complete a sale or the ability of buyers to complete a purchase.	True	False	
3. Alibaba.com does not offer any kind security to verify the accuracy of certain information our paying Users provide them when they register for a paying membership service on the Sites.	True	False	
4. Alibaba.com security verification is unbreakable.	True	False	
5. Alibaba encourages their users to utilize various means, as well as common sense, to evaluate with whom you are dealing.	True	False	
6. Buyers and sellers accessing or using the Sites or Services shall assume the risks of conducting any purchase and sale transactions in connection with or through the Sites or Services.	True	False	
7. Unsatisfactory product quality is a risk that buyers and sellers must assume.	True	False	
8. Identity theft is a risk that buyers and sellers must assume.	True	False	

3. **Main task.** You are the manager of a company called “Pura Vida Products (PVP)”. Today, you received an email from the PVP Board of Directors requesting information that they

need before they decide on their next big purchase. Answer their requests following formal business email standards.

Hello [your name],

I hope this email finds you well.

As you know, we are going to decide on our next best action for our business in the next quarter. This is going to require us to make strategic purchase decisions on how we want to continue to manufacture our products. We have decided not to manufacture our products ourselves any longer. We are now thinking about using an international trade assurance program. One of our advisors mentioned Alibaba.com.

Since you are our general manager, we need you to confirm some information for us. We are especially interested in the transactions between buyers and sellers. First, we'd like to know what members can do with Alibaba.com web-based transaction platform.

Our advisor also mentioned that we need to be careful with Alibaba.com security and verification processes, what are some of the risks that we should we take into considerations when dealing with a seller?

Finally, what happens if the seller breaks the terms of use of Alibaba.com? It is important for us to know how much we can rely on Alibaba.com.

Thank you in advance for your help.

Yours sincerely,

PVP Board of Directors

Useful language for Main Task

Salutation: Hello/ dear _____

Introduction:

I am happy to help with your request.

I will gladly answer your questions.

Body:

I would like to start by answering your question about...

Regarding your _____ question,...

Finally, about your concern/question/inquiry on,...

In the web-based transaction platform, Alibaba.com members can.....

Some of the risks members should take into account are....

Closings:

I hope this helps.

Let me know if you have any questions.

Please contact me if you need additional clarification.

Signature:

Sincerely yours,

Regards,

Post Task: Self-assessment.

Use the following chart to evaluate your email

Use the following checklist to evaluate your email	Yes	No
Did you address the 3 requests?		
Was the information taken from the Terms of Use appropriate?		
Are the ideas in the email easy to understand?		
Does the email follow formal standards? (Salutation, introduction, body, Closing, and signature)		

Additional comments:

Pre-task 3

Hello [your name], _____

I hope this email finds you well. As you know, we are going to decide our next best action for our business in the next quarter. This is going to require us to make strategic purchase decisions on how we want to continue to manufacture our products. We have decided not to manufacture our products ourselves any longer. We are now thinking about using an international trade assurance program. One of our advisors mentioned Alibaba.com. _____

Since you are our general manager, we need you to confirm some information for us. We are especially interested in the transactions between buyers and sellers. First, we'd like to know what members can do with Alibaba.com web-based transaction platform. _____

Our advisor also mentioned that we need to be careful with Alibaba.com security and verification processes, what are some of the risks that we should take into considerations when dealing with a seller? _____

Finally, what happens if the seller breaks the terms of use of Alibaba.com? It is important for us to know how much we can rely on Alibaba.com.

Thank you in advance for your help. _____

Yours sincerely,
PVP Board of Directors _____

Parts of an email

Pre-task 4

Can you find the three requests in this email? Circle them using the annotation tools

I hope this email finds you well. As you know, we are going to decide our next best action for our business in the next quarter. This is going to require us to make strategic purchase decisions on how we want to continue to manufacture our products. We have decided not to manufacture our products ourselves any longer. We are now thinking about using an international trade assurance program. One of our advisors mentioned Alibaba.com.

Since you are our general manager, we need you to confirm some information for us. We are especially interested in the transactions between buyers and sellers. First, we'd like to know what members can do with Alibaba.com web-based transaction platform.

Our advisor also mentioned that we need to be careful with Alibaba.com security and verification processes, what are some of the risks that we should we take into considerations when dealing with a seller?

Finally, what happens if the seller breaks the terms of use of Alibaba.com? It is important for us to know how much we can rely on Alibaba.com.

PowerPoint Presentation



Activity 1

In groups, you will have 5 minutes to do a Google search about Alibaba.com.

You must use websites in English

Then, you will share your findings with the rest of the class.

Useful language:
What did you find?
Do know about this company?
It says in here that it is...
Can you share the screen?



Activity 2

Individually, go to the following link. You will watch a video about Alibaba.com. Answer the questions that will appear during the video.



<https://edpuzzle.com/media/5f39aea004c3953f1d129e72>

Once you finish watching the video, type "ready" in the chat.

Activity 3 / Understanding Terms of Use

Terms of Use

Part A: New version - effective as of May 6th, 2020

PLEASE READ THESE TERMS AND CONDITIONS CAREFULLY!

7. Transactions Between Buyers and Sellers

7.1 Alibaba.com provides electronic web-based platforms for exchanging information between buyers and sellers of products and services. Alibaba.com additionally provides electronic web-based transaction platforms for Members to place, accept, conclude, manage and fulfill orders for the provision of products and services online within the Sites subject to the terms of the Transaction Services Agreement. However, for any Services, Alibaba.com does not represent either the seller or the buyer in specific transactions. Alibaba.com does not control and is not liable or responsible for the quality, safety, lawfulness or availability of the products or services offered for sale on the Sites, the ability of the sellers to complete a sale or the ability of buyers to complete a purchase.

7.2 Users are hereby made aware that there may be risks of dealing with people acting under false pretences. Alibaba.com uses several techniques to verify the accuracy of certain information our paying Users provide us when they register for a paying membership service on the Sites. However, because user verification on the Internet is difficult, Alibaba.com cannot and does not confirm each User's purported identity (including, without limitation, paying Members). We encourage you to use various means, as well as common sense, to evaluate with whom you are dealing.

7.3 Buyers and sellers accessing or using the Sites or Services shall assume the risks of conducting any purchase and sale transactions in connection with or through the Sites or Services. Buyer and sellers accessing or using the Site or Services shall also fully assume all risks of liability or harm of any kind arising out of or in connection with any subsequent activity relating to the products or services that are the subject of the transactions on the Sites. Examples of such risks shall include, but are not limited to: mis-representation of products and services, fraudulent schemes, unsatisfactory product quality, defective or dangerous products, unlawful products, delay or default in delivery or payment, cost mis-calculations, transportation accidents. Nonetheless, if a seller does not meet the terms and conditions costs will be refunded.

7.4 User agrees to provide all information and materials as may be reasonably required by Alibaba.com in connection with your transactions conducted on, through or as a result of use of the Sites or Services. Alibaba.com has the right to suspend or terminate any User's account if the User fails to provide the required information and materials without liability for any losses or damages arising out of or in connection with such suspension or termination.

Adapted from: <https://rule.alibaba.com/rule/detail/2041.htm>



Unit Goal: By the end of this course, students will be able to correctly produce written and oral replies to stakeholders' requests about sales and purchases of products in a formal business environment.

General Objective: Show understanding of the terms and conditions of banking services by answering stakeholder's questions about the main considerations of specific sections and reporting them in a meeting.

Specific Objectives: The students will be able to

1. identify and correct common language mistakes in business emails
2. express their background knowledge about terms and conditions of banking services
3. recognize the meaning of banking-related vocabulary
4. identify the communicative functions of the modals shall, may, can, and must in the terms and conditions of a bank.
5. show understanding of specific sections of terms and conditions of banking services by answering questions from stakeholders and reporting them in a meeting.
6. confirm information given about a bank's terms and conditions.

Objectives	Procedures	Language	Strategies	Macro Skills	Time
1	<p>Warm-up: Feedback on the emails. In the main room, T will show mistakes Ss made when writing business emails in the previous class. Ss will be asked to identify mistakes and try to correct them.</p> <p>Materials</p>	<p>Useful language</p> <ul style="list-style-type: none"> - I think the mistake is... - You should say ... instead of... 		S and R	10 min

	Power Point presentation p.2-4.	- This sentence needs...			
2	<p>Pre-task 1 – What you know. T will give Ss a set of questions about terms and conditions of banking services. In breakout rooms Ss will discuss them. Then, they will share their answers with the class.</p> <ul style="list-style-type: none"> - Have you ever read the terms and conditions of a banking service? - What do you know about the terms and conditions of banks? - What do you think a banks terms and conditions must include? <p>Materials Power Point presentation p.5</p>	<p>Vocabulary Banking terminology. Interests, fees, charges, taxes, withdrawals...</p> <p>Useful language</p> <ul style="list-style-type: none"> - I know that they must include... - I have read... - I think they include... 	Sharing background knowledge.	L and S	10 Min
3	<p>Pre-task 2 – Predicting the meaning T will show a multiple-choice exercise on the screen. In the main room, Ss will read statements from the terms of and conditions of a bank and choose the option containing the correct meaning of a highlighted banking-related word.</p> <p>Materials Power Point presentation p.6-26</p>	<p>Vocabulary Banking terminology. Accrue, debit, currency...</p> <p>Useful language</p> <ul style="list-style-type: none"> - I think the correct answer is... - This word means... 	Predicting the meaning of words	R and S	20 min
4	<p>Pre-task 3: T will share a section of a bank's Terms and Conditions. Ss will try to identify the communicative functions of the modals</p>	<p>Grammar Modals for expressing future actions, abilities,</p>		R and S	20 min

	<p>shall, can, may, and must. (Future action, ability, possibility and obligation) Then, they will read and answer questions based on the information from the text.</p> <p>Materials Power Point presentation p. 27 - 34</p>	<p>possibilities, and obligations. Shall, can, may, and must.</p>			
5	<p>Main task: Ss will work in small groups. T will assign a section of a bank's Terms and Conditions to each group. T will provide a handout with the reading and a link to Padlet where Ss will find questions about their sections and will post the answers. Then, Ss will share their answers with their peers.</p> <p>Materials Padlet https://padlet.com/lidiagmz71fwohx3g5m1rn61tv</p> <p>Handout (Google Docs) https://drive.google.com/file/d/1jH15BmmbwQouMYNknxh_9mKjyM13IDIf/view?usp=sharing</p>	<p>Vocabulary Banking terminology. Interests, fees, charges, taxes, withdrawals....</p> <p>Useful language</p> <ul style="list-style-type: none"> - I think the correct answer is... - This word means.... - I found that... - This is correct because... - This is not right because... 	Scanning	R, W and S	40 min
5	<p>Post Task: In groups, Ss will check what their classmates posted on Padlet. They will verify that the</p>			R	10

					<p>answers they posted are correct by checking the information from the terms and conditions of the bank. They will write a comment about any correction that may be needed.</p> <p>Materials: Padlet https://padlet.com/lidiagmz71/fwohx3g5m1m61tv</p>	
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Handout 1

You are working as a risk analyst for Pura Vida Products. It has been decided to close a deal with the Shanghai Commercial & Savings Bank for the global selling expansion strategy. You will attend several meetings in the next few weeks, and you need to get familiar with the bank's terms and conditions.

1. In small groups, read the following Terms and Conditions of the Shanghai Commercial & Savings Bank.
2. Answer the questions below to demonstrate your understanding.
3. Go to Padlet and add your answer as a comment to the post <https://padlet.com/lidiagmz71/fwohx3g5m1rn61tv>
4. Share your findings with your peers.

Terms and Conditions

Glossary

Accrue: accumulate or receive

Aforesaid: mentioned before or above

Amend: modify formally

Amount: a quantity of something

avoidance of doubt: used in legal agreements to emphasize a condition of the agreement that might otherwise be open to doubt or interpretation

charges: amounts of money paid

currency: a system of money in general use in a particular country

Customer: a person or organization that buys goods or services from a business

Debit: remove an amount of money from a customer's account

Denominated: of sums of money be expressed in a specified monetary unit

Disclosing: make secret or new information known

Dishonored: fail to respect an agreement

Elapsed: (of time) pass or go by.

Fees: a payment made in exchange for services.

Foreign: from a country other than one's own.

Hereby: as a result of this document

Imposed: force to be accepted

Incurred: become subject to something unpleasant as a result of one's actions.

in writing: in hand written form

liable: responsible by law

Notwithstanding: Not following what was mentioned

on demand: as soon as required

payable: required to be paid

Prior: existing or coming before in time

Sign: write one's name on to identify oneself

Signature: a person's name written in a distinctive way as a form of identification in authorizing a document

to honor :fulfill an obligation

Withdrawal Instructions Form: a source document filled out by a customer to authorize a withdrawal

Withdrawal: an act of taking money out of an account.

1. Deposits

1.1 The Bank shall accept any deposit made by the Customer and arrange the deposit to the Customer's Bank Account(s) of preference.

1.2 The Bank, at any time without prior notice or disclosing any reason to the Customer, may:

- (a) refuse to accept any deposit;
- (b) limit the amount which may be deposited;
- (c) refuse to accept any other instruments drawn to the order of third parties.

1.3 Any deposit that the Customer makes shall be in the currency permitted by the Bank and commission or other charges may be imposed.

1.4 The Bank shall have the right to debit the Bank Account for charges or any amount incurred if any instruments for deposits are dishonored.

1.5 Notwithstanding the above clauses, the Bank shall not be liable for any delay or refusal to credit the Customer's Bank Account.

2. Withdrawals

2.1 The Withdrawal Instructions Form shall be completed in writing by the Customer and comply with these Terms. The Customer must sign and provide the Withdrawal Instructions Form to the Bank. The Bank shall not be legally obligated to honor any withdrawal request if there are insufficient funds in the Customer's Bank Account. In the case that they instructions of payment exceed the credit balance of a customer, the bank can select which payments shall be executed based on their own criteria.

2.2 All alterations on withdrawal instructions forms must be confirmed by the Customer's full and complete signature.

3. Interest

3.1 Interest shall not accrue on current accounts denominated in Singapore Dollars and foreign currency accounts.

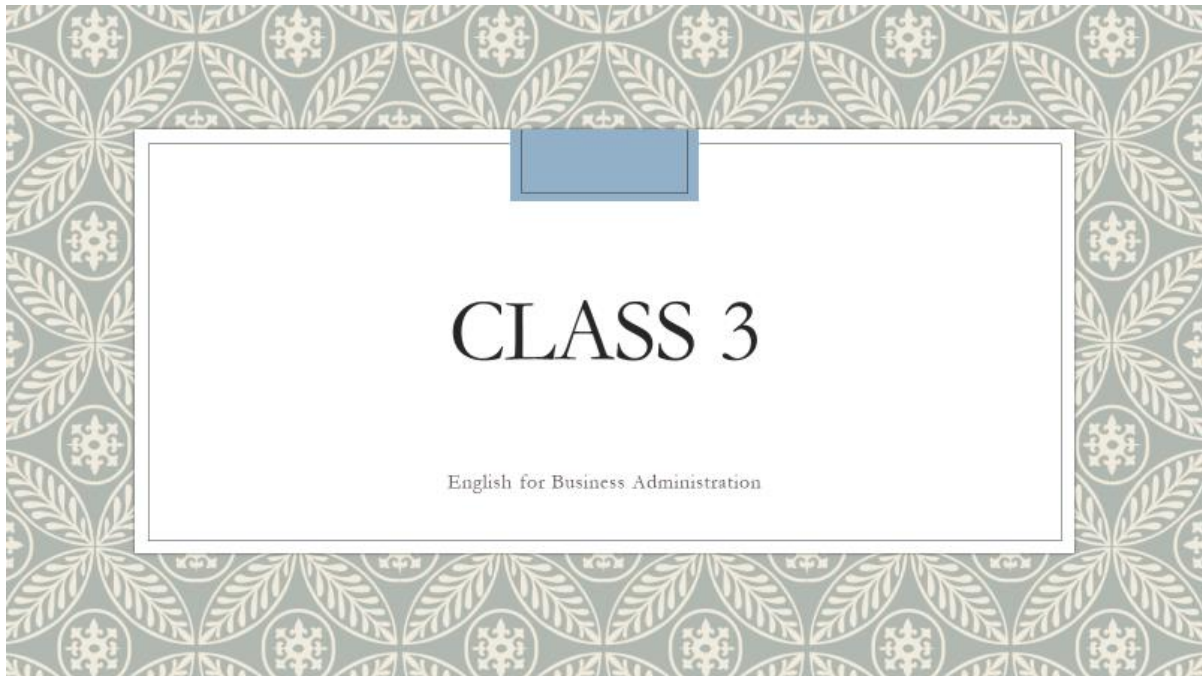
3.2 The customer must pay to the Bank all interest accrued on all sums payable calculated from the due date to the date of actual payment. The Bank shall

prescribe these interests based on the actual number of days elapsed in a full year in accordance with the Bank's relevant currency.

4. Fees and Charges

4.1 The Bank may impose fees and charges for the provision of any service according to the standards published by the Bank. The Bank can vary, revise or amend the amount of fees upon not less than thirty (30) days' prior notice to the Customer. These changes might be posted on the website of the Bank or in such other manner as the Bank sees fit. Customers can have access to this information at any time upon request. Any fees and charges imposed by the Bank shall be payable by the Customer on demand. For avoidance of doubt, the aforesaid thirty (30) days' prior notice is not applicable in case where the variation of fees/charges is beyond the control of the Bank.

4.2 The Customer hereby authorizes the Bank (without prior notice or reference to the Customer) to deduct such fees and charges from any of the Bank Accounts.



Feedback on business emails

1. Is very important that you know Alibaba.com provides electronic web-based transaction platforms for Members.
 - *It* is very important that you know... / *We need a subject before the verb.*

2. For this reason, Alibaba.com encourage you to use various means to evaluate with whom you are dealing.
 - For this reason, Alibaba.com encourages you / *Add an -s to the verb if it is he, she, or it*

3. Additionally, provides electronic web-based transaction platforms for Members to place, accept, conclude, manage and fulfill orders.
 - Additionally, *it/Alibaba.com* provides electronic web-based transaction / *We need a subject before the verb.*

Feedback on business emails

4. Next, the risks to consider when you dealing with a seller are...
- Next, the risks to consider when you **are** dealing... / **we are buying...**,
The bank **is offering...**,
5. And final, Buyers and sellers accessing or using the Sites or Services shall assume the risks of conducting any purchase.
- **Finally**, Buyers and sellers accessing
6. Buyers and sellers can exchanging information in the web-based platform.
- Buyers and sellers can **exchange...**/ They can **request..** The customer can **purchase**

Feedback on business emails

7. That means that Alibaba.com it's only the platform to connect the seller and the buyer.
- That means that Alibaba.com **is...** OR That means that **it's...**
8. It means that Alibaba.com don't assume any risks.
- It means that Alibaba.com **doesn't**

What you know.

In small groups, discuss the following questions.

- Have you ever read the terms and conditions of a banking service?
- What do you know about the terms and conditions of banks?
- What do you think a banks terms and conditions must include?



WHAT'S THE
MEANING OF... ?

What's the meaning of... ?

Interest shall not **accrue** on current accounts denominated in Singapore Dollars

1. accumulate or receive
2. required to be paid
3. (of time) pass or go by.

What's the meaning of... ?

The Bank can vary, revise or **amend** the amount of fees

1. Fail to respect an agreement
2. From a country other than one's own.
3. Modify formally

What's the meaning of... ?

For **avoidance of doubt**, the aforesaid thirty (30) days' prior notice is not applicable in case where the variation of fees/charges is beyond the control of the Bank.

1. Used in legal agreements to emphasize a condition of the agreement that might otherwise be open to doubt or interpretation
2. A person's name written in a distinctive way as a form of identification in authorizing a document
3. Not following what was mentioned

What's the meaning of... ?

Any deposit that the Customer makes shall be in the **currency** permitted by the Bank

1. Make secret or new information known
2. A system of money in general use in a particular country
3. As a result of this document

What's the meaning of... ?

The Bank shall have the right to **debit** the Bank Account for charges

1. Remove an amount of money from a customer's account
2. Existing or coming before in time
3. Fulfill an obligation

What's the meaning of... ?

Accounts **denominated** in Singapore Dollars

1. Of sums of money be expressed in a specified monetary unit
2. Become subject to something unpleasant as a result of one's actions.
3. A person or organization that buys goods or services from a business

What's the meaning of... ?

The Bank may impose **fees** and charges for the provision of any service

1. In handwritten form
2. A payment made in exchange for services
3. Make secret or new information known

What's the meaning of... ?

Any **fees** and charges imposed by the Bank shall be **payable** by the Customer on demand

1. Force to be accepted
2. From a country other than one's own.
3. Required to be paid

What's the meaning of... ?

The **Withdrawal Instructions Form** shall be completed in writing by the Customer

1. A person or organization that buys goods or services from a business
2. A source document filled out by a customer to authorize a withdrawal
3. Of sums of money be expressed in a specified monetary unit

What's the meaning of... ?

The Bank shall not be legally obligated to honor any **withdrawal** request if there are insufficient funds in the Customer's Bank Account

1. An act of taking money out of an account.
2. Force to be accepted
3. Fail to respect an agreement

READING: TERMS AND CONDITIONS

Let's read: Terms and Conditions

3. Interest

3.1 Interest **shall** not accrue on current accounts denominated in Singapore Dollars and foreign currency accounts.

3.2 The customer **must** pay to the Bank all interest accrued on all sums payable calculated from the due date to the date of actual payment. The Bank **may** prescribe these interests based on the actual number of days elapsed in a full year in accordance with the Bank's relevant currency.

The bank **can** modify these interests at any time with the appropriate timely notice.

 Ability

 Possibility

 A future action

 Obligation

3. Interest

3.1 Interest shall not accrue on current accounts denominated in Singapore Dollars and foreign currency accounts.

3.2 The customer must pay to the Bank all interest accrued on all sums payable calculated from the due date to the date of actual payment. The Bank may prescribe these interests based on the actual number of days elapsed in a full year in accordance with the Bank's relevant currency. The bank can modify these interests at any time with the appropriate timely notice.

1. Shall Interest accrue on accounts denominated in foreign currency accounts?
2. Must the customer pay to the bank all interest from the due date to the date of actual payment?
3. May the bank prescribe these interests in US dollars only?
4. Can the bank modify these interests at any time with the appropriate timely notice?

Understanding a section of a bank's terms and conditions

You are working as a risk analyst for Pura Vida Products. It has been decided to close a deal with the Shanghai Commercial & Savings Bank. You will attend several meetings in the next few weeks, and you need to get familiar with the bank's terms and conditions.

- Work in small groups
- Read the following Terms and Conditions of the Shanghai Commercial & Savings Bank.
- Answer the questions below to demonstrate your understanding.
- Go to Padlet and add your answer as a comment to the post
- Share your findings with your peers.

Confirming the presented information of a bank's terms and conditions

- Check the posted information your classmates posted on Padlet.
- Write a comment if you find any mistakes.

University of Costa Rica
 Master's Program in TEFL
 English for Business Administration
 Arguedas, Cervantes, Gómez

Date: September 2th Lesson Plan # 4
 Student teacher: Luis Cervantes
 Assistant/s: Andrick Arguedas
 Unit # 1 Title of unit: Managing Your Stakeholders



Unit Goal: By the end of this course, students will be able to correctly produce written and oral replies to stakeholders' requests about sales and purchases of products in a formal business environment.

General Objective: Respond to stakeholders' requests in a business meeting about a banking service terms and conditions.

Specific Objectives: The students will be able to

1. correctly spell and pronounce vocabulary related to banking services.
2. correctly identify the proper use of common business related phrases during a meeting.
3. appropriately use intonation patterns of common business related phrases.
4. effectively participate and respond to stakeholder's requests a business related to banking services.

Objectives 5 and 6 are missing

Objectives	Procedures	Language	Strategies	Macro Skills	Time
1	<p>Warm-up: Pronunciation Review. In the main room, T will show Ss a slide with banking related words studied in the previous class that needed extra practice. T will clarify any pronunciation mistakes. Ss will be actively listening other students to identify areas of improvement.</p> <p>Materials Power Point Presentation Slide 1 to 18</p>	<p>Vocabulary Currency, Interest, Payable, Accrue, Withdrawal, Charges, Liabe, Prior, Account, Signature, Foreign, Authorize, Permitted, Fees.</p> <p>Useful language</p>		S	10 min

			<ul style="list-style-type: none"> - Can you repeat the word? - Can you use the word in a sentence? - Could you give me the meaning of the word? - Can I try a different word? 			
2	<p>Pre-task 1 – Business Meetings. In the main room, T will show a picture that represents people in a face to face and a virtual meeting. Ss will be asked the following questions:</p> <ul style="list-style-type: none"> • What is happening in these pictures? • What do you think they are discussing? • What are some differences between these two meetings? <p>Materials Power Point presentation Slide 19</p> <p>Pre-task 2 –</p> <p>T will show a slide with a group of sentences, and a group of language functions. Ss will need to match them by</p>	<p>Useful language</p> <ul style="list-style-type: none"> - I think they are.... - It seems like they are... - I am sure they are... 		S L	10 Min	
3		<p>Vocabulary Greetings</p> <p>1. "Hello"</p>		R L S	20 min	

	<p>using the "Annotate" function in zoom drawing arrows. The language functions include: Meeting openers, greetings, asking questions, answering questions, wrapping up a meeting, saying goodbye. T will review the right answers with the class.</p> <p>Materials Power Point presentation Slide 20</p>	<p>2. "Good morning / afternoon" To wrap up a meeting</p> <ol style="list-style-type: none"> 1. That would be all for this meeting. 2. That will be all for today. <p>Useful language</p> <ul style="list-style-type: none"> - This is a good match. - I don't think that is the correct match. 		
4	<p>Pre-Task 3 T will provide relevant context about a business meeting that Ss will need to roleplay. T will explain the purpose of the meeting, who the people in the meeting are, and what they need to do during the meeting. Then, T will present two samples of the dialogue that Ss will need to create. T will assign the roles and ask Ss to read the dialogue in the main room to model the exercise.</p> <p>Materials Power Point presentation Slide 21-33</p>	<p>Vocabulary Greetings</p> <ol style="list-style-type: none"> 3. "Hello" 4. "Good morning / afternoon" <p>To wrap up a meeting</p> <ol style="list-style-type: none"> 3. That would be all for this meeting. 4. That will be all for today. 	R, S L	20 min
5	<p>Main Task:</p>	<p>Vocabulary</p>	Asking for clarification.	L, W, S 50 min

	<p>Using the phrases studied before, plus some additional phrases, Ss will need to build a dialogue that follows the specifications given by the teacher. Once the dialogue has been created, Ss will present it in the main room. While one of the groups presents, the other Ss will be asked to look for areas of improvement in their peers.</p> <p>Materials Power Point presentation Slide 34 - 40</p>	<p>Business meeting common phrases.</p> <ul style="list-style-type: none"> - Good morning - Hi everyone. - First, I have some questions. Jesse, may the bank refuse to accept deposits from customers without prior notice - Thank you. - Goodbye. - Thanks. Have a good rest of your day 		
6	<p>Post task: T will share their comments and feedback about the presentation. T will also go over pronunciation mistakes that were have not been corrected already by the Ss. T will ask Ss to repeat mispronounced words.</p> <p>Materials Power Point presentation Slide 41</p>	<p>Useful language</p> <ul style="list-style-type: none"> - I believe the word _____ should be pronounced _____. - There was a missing _____ sound/letter in the word. 	L & S	10 min

**WELCOME TO OUR LESSON 4!
TODAY WE WILL LEARN HOW
TO RESPOND TO
STAKEHOLDERS' REQUESTS
IN A BUSINESS MEETING
ABOUT A BANKING SERVICE
TERMS AND CONDITIONS.**

**ACTIVITY 1:
PRONUNCIATION REVIEW**

- How do you pronounce the following banking-related vocabulary?

Currency

a system of money in general use in a particular country.



- How do you pronounce the following banking-related vocabulary?

Payable

(of money) required to be paid; due.

- How do you pronounce the following banking-related vocabulary?

Accrue

(of sums of money or benefits) be received by someone in regular or increasing amounts over time.

- How do you pronounce the following banking-related vocabulary?

Withdrawal

an act of taking money out of an account.

- How do you pronounce the following banking-related vocabulary?

Charges

demand (an amount) as a price from someone for a service rendered or goods supplied.

- How do you pronounce the following banking-related vocabulary?

Liable

responsible by law

- How do you pronounce the following banking-related vocabulary?

Prior

existing or coming before in time, order, or importance.

- How do you pronounce the following banking-related vocabulary?

Foreign

from a country or language other than one's own.

- How do you pronounce the following banking-related vocabulary?

Signature

a person's name written in a distinctive way as a form of identification in authorizing a check or document or concluding a letter.

- How do you pronounce the following banking-related vocabulary?

Account

a record or statement of financial expenditure and receipts relating to a particular period or purpose.

- How do you pronounce the following banking-related vocabulary?

Authorize

give official permission for approval

- How do you pronounce the following banking-related vocabulary?

Permitted

give authorization or consent to (someone) to do something.

- How do you pronounce the following banking-related vocabulary?

Fees

a payment made to a professional person or to a professional or public body in exchange for advice or services.

Today's Topic



- What is happening in these pictures?
- What do you think they are discussing?
- What are some differences between these two meetings?

MATCHING

Wrapping up a meeting ●

Asking questions ●

Greetings ●

Answering questions ●

Meeting openers ●

Saying goodbye ●

- 1. Thank you. Goodbye everyone.
- 2. Thanks. Have a good rest of your day.
- 3. It was great meeting you, see you next week/next meeting.

- 1. Sure, let me answer that.
- 2. Absolutely, I have an answer for you.
- 3. I can answer that.

- 1. Today we're here to discuss"
- 2. Today I would like to outline our plans for"

- 1. That would be all for this meeting.
- 2. That will be all for today.
- 3. 3. That was our last topic, thank you everyone for coming.

- 1. First, I have some questions,...
- 2. Okay thanks, I want to ask another question,...
- 3. All right, I still have some doubts,...

- 1. "Hello"
- 2. "Good morning / afternoon"
- 3. "Hi everyone, thank you for coming/joining."

YOUR IMPORTANT BUSINESS MEETING WILL HAPPEN SOON! YOU WILL WORK IN GROUPS.

FIRST, LET'S LEARN WHO IS IN THE MEETING!

Before we continue, you may download the presentation now:

<https://drive.google.com/drive/u/1/folders/lzAGtW4-ygbb5jOV5mKT9mYYiiXgphzQd>

Ali is the CEO of Pura Vida Products (PVP). This person is in the meeting to clear some doubts about the coming deal with the Shanghai Bank.

ALI



Jesse is the Vice President of PVP. This person is in the meeting to answer questions based on the research he/she has been doing on the Shanghai Bank.

JESSE



Taylor is Ali's the executive assistant. This person organized the meeting. He/She is in the meeting to answer questions based on the research he/she has been doing on the Shangai Bank.

TAYLOR



**BEFORE WE CONTINUE,
LET'S GO TO OUR GROUPS, DECIDE
WHICH ROLE EACH PERSON IN
YOUR TEAM WILL HAVE.**

(2 MIN)

Useful language:

- Who do you want to be?
- I want to be Ali/Jesse/Taylor.
- Yes, you can be Ali

DYNAMICS, WHY ARE THEY IN THIS MEETING?

Ali has to:

- 1. Greet others.**
- 2. Ask 1 question to Jesse.**
- 3. Ask 1 question to Tyler.**
- 4. Say goodbye to others.**
- 5. Tell Jesse the next meeting is going to be November 26th, 2020.**

ALI



Jesse has to:

- 1. Greet others.**
- 2. Answer the question that Ali has.**
- 3. Say goodbye to others.**
- 4.**
- 5. Ask Ali when the next meeting is going to be.**

JESSE



Taylor has to:

- 1. Start the meeting by explaining the purpose of the meeting.**
- 2. Greet others.**
- 3. Answer the question that Ali has for him/her.**
- 4. Close the meeting.**
- 5. Say goodbye to others.**

TAYLOR



DYNAMICS FOR A TWO-PEOPLE GROUP

- **Ali has to:**

- Greet Jesse and explain the purpose of the meeting.
- Ask 2 question to Jesse.
- Tell Jesse the next meeting is going to be November 26th, 2020.
- Thank Jesse and say goodbye.



- **Jesse has to:**

- Greet Ali
- Answer the questions that Ali has.
- Ask Ali when the next meeting is going to be.
- Say goodbye to others.



INSTRUCTIONS: BASED ON
THE PREVIOUS
SPECIFICATIONS, YOU WILL
NEED TO CREATE A DIALOGUE
IN GROUPS OF 3.

IMPORTANT: ALI'S QUESTIONS AND THEIR ANSWERS SHOULD BE TAKEN FROM THE PADLET WE WORKED ON LAST CLASS.

Terms and Conditions
Sections of Terms and Conditions of a bank

Section 1 - Deposits	Section 2 - Withdrawals	Section 3 - Interest	Section 4 - Fees and Charges
<p>Will the Bank accept any deposit made by the Customer and arrange the deposit to the Customer's Bank Account?</p> <p>2. May the bank refuse to accept deposits from customers without prior notice?</p> <p>Can customers make deposits in a bank permitted currency?</p>	<p>Does the Withdrawal Instructions Form be completed in writing?</p> <p>2. Must the Customer sign and provide the Withdrawal Instructions Form to the Bank?</p> <p>Can the Bank bound to honor any withdrawal request if there are insufficient funds in the Customer's Bank Account?</p>	<p>Does interest accrue on accounts denominated in foreign currency accounts?</p> <p>2. Must the customer pay to the bank all interest from the due date to the date of actual payment?</p> <p>Will the bank prescribe these interests in US dollars only?</p>	<p>1. May the bank impose fees and charges of any service according to the standards published by the government?</p> <p>2. Can the bank vary the amount of fees with a 40 days' prior notice to the customer?</p> <p>3. Might these changes be posted in the website of the bank?</p>

LET'S PRACTICE BEFORE YOU DO IT!

- **Tyler:** Good morning
- **Ali:** Hi everyone.
- **Jesse:** Hello.
- **Ali:** First, I have some questions. Jesse, may the bank refuse to accept deposits from customers without prior notice?
- **Jesse:** Sure, let me answer that. Yes, the Bank can refuse to accept any deposits from customer without prior notice. I hope that helps.
- **Ali:** Okay thanks, I want to ask another question. Tyler, Shall the Bank be liable for any delay or refusal to credit the Customer's Bank Account?
- **Tyler:** Sure, let me answer that. No, the bank shall not be liable for any delay or refusal to credit the Customer's Bank Account.
- **Jesse:** Excuse me team, when is our next meeting going to be?
- **Ali:** Sure, our next meeting is going to be on November 26th, 2020.
- **Tyler:** Thank you. That will be all for today. Goodbye everyone.
- **Ali:** Thank you. Goodbye.
- **Jesse:** Thanks. Have a good rest of your day.



**LET'S PRACTICE ONE
MORE TIME!**

- **Tyler:** Good morning everybody. Since everyone is here, let's get started. I've called this meeting in order to clear some questions that our CEO, Ali, has before he makes a decision.
- **Ali:** Hello, it is a pleasure to be here.
- **Jesse:** Hello! Welcome everyone!
- **Ali:** I would like to know if the bank can vary the amount of fees with a 40 days' prior notice to the customer. Jesse, could you expand on this?
- **Jesse:** Absolutely, I have an answer for you. Yes. the bank can vary the amount of fees with a 40 day notice because the minimum time is 30 days.
- **Ali:** Thank you. I am still not clear if the customers should pay to the bank all interest from the due date to the date of actual payment. Tyler, what do you know about this?
- **Tyler:** Yes, the customer must pay to the Bank all interest accrued on all sums payable calculated from the due date to the date of actual payment. I know that is a lot to take in, so let me know if anything I've said doesn't make sense.
- **Jesse:** I'd love to continue this conversation at a second meeting, when is our next meeting going to be?"
- **Ali:** Absolutely, let me answer that.
- **Tyler:** Perfect, if no one has anything else to add, then I think we'll wrap this up. Thank you. Goodbye everyone.
- **Ali:** I appreciate it team. It was great meeting you, see you in the next meeting. Bye.
- **Jesse:** It's been very fruitful to meet. Enjoy the rest of your week. Bye.

Group 1	Group 2	Group 3	Group 4
<p>Section 1 - Deposits</p> <ol style="list-style-type: none"> 1. Shall the Bank accept any deposit made by the Customer and arrange the deposit to the Customer's Bank Account? 2. May the bank refuse to accept deposits from customers without prior notice? 3. Shall customers make deposits in a bank permitted currency? 4. Shall the Bank liable for any delay or refusal to credit the Customer's Bank Account? 	<p>Section 2 - Withdrawals</p> <ol style="list-style-type: none"> 1. Shall the Withdrawal Instructions Form be completed in writing? 2. Must the Customer sign and provide the Withdrawal Instructions Form to the Bank? 3. Shall the Bank bound to honor any withdrawal request if there are insufficient funds in the Customer's Bank Account? 4. Do All alterations on withdrawal instructions have to be confirmed by the Customer's full and complete signature? 	<p>Section 3 - Interest</p> <ol style="list-style-type: none"> 1. Shall interest accrue on accounts denominated in foreign currency accounts? 2. Must the customer pay to the bank all interest from the due date to the date of actual payment? 3. Shall the bank prescribe these interests in US dollars only? 4. Can the bank modify these interests at any time with the appropriate timely notice? 	<p>Section 4 - Fees and Charges</p> <ol style="list-style-type: none"> 1. May the bank impose fees and charges of any service according to the standards published by the government? 2. Can the bank vary the amount of fees with a 40 days' prior notice to the customer? 3. Might these changes be posted in the website of the bank? 4. Do the 30 days' prior notice apply where the variation of fees/charges is beyond of the control of the bank?

**IT IS YOUR TIME TO BUILD
YOURS! YOU WILL NEED TO
PRESENT IT IN THE MAIN
ROOM.**

**DO YOU HAVE ANY
QUESTIONS BEFORE WE
BEGIN?**

Write Your Dialogue Here

Business Meeting: Clarifying Questions About Shangai's Bank Terms and Conditions

Taylor (Greeting and Opening):

Ali (Greeting):

Jesse (Greeting):

Ali (Question 1):

Jesse (Answer):

Ali (Question 2):

Tyler (Answer):

Jesse (Question):

Ali (Answer):

Tyler (closing and goodbye):

Ali (Goodbye):

Jesse (Goodbye):

Meeting ends

Find questions and Answers for Ali Here:

<https://padlet.com/hidiagmz71/fwohx3g5m1rn81tv>

Write Your Dialogue Here (2 People)

Business Meeting: Clarifying Questions About Shanghai's Bank Terms and Conditions

Ali (Greeting and Opening):

Ali (Question 1):

Jesse (Answer 1):

Ali (Question 2):

Jesse (Answer 2):

Jesse (Question):

Ali (Answer):

Ali (Goodbye):

Jesse (Goodbye):

Meeting ends

Find questions and Answers for Ali Here:

<https://padlet.com/lidiagmz71/fwohx3g5m1rn61tv>

Write Your Dialogue Here

Business Meeting: Clarifying Questions About Shanghai's Bank Terms and Conditions

Find questions and Answers for Ali Here:

<https://padlet.com/lidiagmz71/fwohx3g5m1rn61tv>

USE THE FOLLOWING PHRASES TO COMPOSE YOUR DIALOGUE

Greetings

- "Hello"
- "Good morning / afternoon"
- Hi everyone, thank you for coming/joining.

Meeting openers.

- Today we're here to discuss"
- Today I would like to outline our plans for"

More advanced Greetings

- Hello, it is a pleasure to be here.
- "Hello! Welcome everyone!"
- "Good morning, happy to be here"

To ask questions

- First, I have some questions. [Name]. + [Question]
- Okay thanks, I want to ask another question.
[Name]. + [Question]
- All right, I still have some doubts. [Name]. +
[Question]

More advanced:

- I would like to know if _____ [Name] could you expand on this?
- I still have some doubts about _____ [Name], what do you know about this?

To answer questions and offer clarification

Before you answer:

- Sure, let me answer that.
- Absolutely, I have an answer for you.
- I can answer that.

After you answer:

- I hope that helps.
- Let me know if that's clear.
- I hope that answers your question.

To ask about the next meeting

- Excuse me team, when is our next meeting going to be?
- I am sorry, could you share the day and time of our next meeting?
- [NAME], could you remind when our next meeting is going to be?

More advanced

- "I'd like to set up a meeting with you at your earliest convenience. When are you free?"
- "I'd love to continue this conversation at a second meeting, when is our next meeting going to be?"

To say goodbye

- Goodbye.
- Thank you. Goodbye everyone.
- Thanks. Have a good rest of your day.

More advanced.

- I appreciate it team. It was great meeting you, see you later/next week/next meeting. Bye.
- It's been very fruitful to meet. Enjoy the rest of your week. Bye.

To wrap up the meeting

- That would be all for this meeting.
- That will be all for today.
- That was our last topic, thank you everyone for coming.

More advanced:

- All right, it looks like we've covered the main items on the agenda.
- Perfect, if no one has anything else to add, then I think we'll wrap this up.

LET'S REVIEW

Adapted From: <https://virtualspeech.com/blog/english-phrases-workplace-meeting>

Greetings and meeting openers	To ask questions
<p>Greetings</p> <ol style="list-style-type: none"> 1. "Hello" 2. "Good morning / afternoon" 3. Hi everyone, thank you for coming/joining. <p>Meeting openers.</p>	<ol style="list-style-type: none"> 1. First, I have some questions. [Name]. + [Question] 2. Okay thanks, I want to ask another question. [Name]. + [Question]

<ol style="list-style-type: none"> 1. Today we're here to discuss" 2. Today I would like to outline our plans for" <p>More advanced Greetings</p> <ol style="list-style-type: none"> 1. Hello, it is a pleasure to be here. 2. "Hello! Welcome everyone!" 3. "Good morning, happy to be here" <p>More advanced Meeting openers.</p> <ol style="list-style-type: none"> 1. "I've called this meeting in order to...." 2. There are [number] items on the agenda. First....Second.... Third...." 	<ol style="list-style-type: none"> 3. All right, I still have some doubts. [Name]. + [Question] <p>More advanced:</p> <ol style="list-style-type: none"> 1. I would like to know if _____ [Name] could you expand on this? 2. I still have some doubts about_____ [Name], what do you know about this?
<p>To answer questions and offer clarification</p>	<p>To say goodbye</p>
<p>Before you answer:</p> <ol style="list-style-type: none"> 1. Sure, let me answer that. 2. Absolutely, I have an answer for you. 3. I can answer that. <p>After you answer:</p> <ol style="list-style-type: none"> 1. I hope that helps. 2. Let me know if that's clear. 3. I hope that answers your question. <p>More Advanced</p> <ol style="list-style-type: none"> 1. I know that's a lot to take in, so let me know if anything I've said doesn't make sense. 	<ol style="list-style-type: none"> 2. Goodbye. 3. Thank you. Goodbye everyone. 4. Thanks. Have a good rest of your day. <p>More advanced.</p> <ol style="list-style-type: none"> 1. I appreciate it team. It was great meeting you, see you later/next week/next meeting. Bye. 2. It's been very fruitful to meet. Enjoy the rest of your week. Bye.

To ask about the next meeting	To wrap up a meeting
<ol style="list-style-type: none"> 1. Excuse me team, when is our next meeting going to be? 2. I am sorry, could you share the day and time of our next meeting? 3. [NAME], could you remind when our next meeting is going to be? <p>More advanced</p> <ol style="list-style-type: none"> 1. "I'd like to set up a meeting with you at your earliest convenience. When are you free?" 2. "I'd love to continue this conversation at a second meeting, when is our next meeting going to be?" 	<ol style="list-style-type: none"> 1. That would be all for this meeting. 2. That will be all for today. 3. That was our last topic, thank you everyone for coming. <p>More advanced:</p> <ol style="list-style-type: none"> 1. All right, it looks like we've covered the main items on the agenda. 2. Perfect, if no one has anything else to add, then I think we'll wrap this up.



Unit Goal: By the end of this unit, students will be able to successfully write an audit report and present it in a face-to-face meeting.

General Objective: By the end of the lesson, the students will be able to show understanding of an audit report by accurately verifying information in a true and false exercise.

Specific Objectives: The students will be able to

1. Correctly pronounce words related to banking services studied in the previous class.
2. Adequately express their previous knowledge of audit reports orally.
3. Correctly identify the meaning of technical vocabulary in an audit report.
4. Accurately use scanning to find specific information in an audit report.
5. Accurately verify the information in an audit report by answering a set of true and false items.
6. Appropriately identify the main ideas of an audit report.
7. Correctly read large numbers in an audit report aloud.

Objectives	Procedures	Language (Vocabulary, expressions, useful language, grammatical or phonetic features)	Strategies	Macro Skills	Time
1	Warm-up: Pronunciation review -T will show Ss a PowerPoint presentation with words they mispronounced during the previous lesson.	Vocabulary -Deposit, requirement, due date, withdrawal, other, since, customer, research, answer		S and L	5 min.

	<p>-One by one, Ss will be asked to pronounce one of the words correctly.</p> <p>-T will correct Ss' pronunciation if necessary.</p> <p>Materials: PowerPoint presentation, pp 2-13.</p>	<p>Useful language:</p> <ul style="list-style-type: none"> -This word is pronounced.... -How do you pronounce this word? -What is the meaning of this word? 		
2	<p>Pre-task 1: What do you know about audit reports?</p> <ul style="list-style-type: none"> -In breakout rooms, Ss will have 7 minutes to discuss the following questions about audit reports, they can also look for information on the web: <ol style="list-style-type: none"> 1. What is an audit report? 2. What type of information do you find in an audit report? 3. What are the sections of an audit report? 4. Why are audit reports important? -After this, T will ask Ss to share their answers in the main room. -Then, T will show Ss a slide with relevant information about audit reports. <p>Materials: PowerPoint presentation, pp 14-15.</p>	<p>Vocabulary: Sections of an audit report (introduction, objective and scope, overall evaluation, findings and recommendations, management comments, evaluation of management comments)</p> <p>Useful Language:</p> <ul style="list-style-type: none"> -An audit report is -In this report, you can find information about... -The sections of an audit report are... -Audit reports are important because... 	S and L	15 min.

3	<p>Pre-task 2: Auditing-related Vocabulary</p> <p>-Ss will be shown a list of definitions of auditing-related words. Taking turns, Ss will match the definitions to the words by dragging and dropping the words next to their definitions.</p> <p>-T will check Ss' answers and clarify doubts if needed.</p> <p>Materials: Mimio Studio Presentation, pp 1-2.</p>	<p>Vocabulary: Auditing-related Vocabulary (Procurement card, accountability, disallowed expenditures, compliance, accounting records)</p> <p>Useful language: -What is the meaning of the word...? -Can you use the word ____ in a sentence?</p>	R	15 min
4	<p>Pre-task 2: Scanning an audit report</p> <p>-T will explain how to scan a text to Ss.</p> <p>-Then, Ss will be shown an introduction of an audit report. Ss will have one minute to scan the text and answer complete three sentences using information from the text.</p> <p>-After that, T will ask Ss to share their answers.</p> <p>-Next, T will ask Ss to read the introduction again. Then, Ss will try to guess what the main topic of the report is.</p> <p>Materials: Mimio Studio Presentation, pp 3-4.</p>	<p>Useful language: -This audit report is about... -This report presents information about...</p>	Scanning for specific details	R, S, and L 15 min.

4 and 5	<p>Main Task: Showing understanding</p> <ul style="list-style-type: none"> -In breakout rooms, Ss will read an audit report in <i>Handout 1</i>. Then, Ss will complete a true and false exercise in order to verify the information they read in the report. -Meanwhile, T will monitor Ss work. -After this, Ss will be asked to share their answers in the main room. -T will clarify any doubts if needed. <p>Materials: Handout 1, pp 1-3. PowerPoint presentation, pp 17.</p>	<p>Vocabulary: Auditing-related Vocabulary (Procurement card, accountability, disallowed expenditures, compliance, accounting records)</p> <p>Useful language:</p> <ul style="list-style-type: none"> -Is this true/false? -I think this is true/false because... -It says in here that... -If this is false, then what is the correct information? 	Scanning for specific details	R, S, and L	40 min.
6	<p>Post task: Discussing main ideas</p> <ul style="list-style-type: none"> -In breakout rooms, Ss will have 7 minutes to discuss the following questions about the audit report they read during the main task: <ol style="list-style-type: none"> 1. What was the audit report about? 2. In your opinion, what are the most important points mentioned in the report? 3. Were there any problems with the use of the P-Cards? 4. What can you do to help employees comply with company policies? 	<p>Useful Language:</p> <ul style="list-style-type: none"> -The report was about... -In my opinion, the most important points were... -I think the problem was that... -I think there were no problems with the use of P-Cards -In order to help employees comply with company policies, you can... 		S and L	10 min.

	<p>After this, Ss will share their answers with the rest of the class.</p> <p>Materials: PowerPoint presentation, pp 18.</p>			
7	<p>Additional Activity (in case tasks take less time than expected): Large numbers in English</p> <ul style="list-style-type: none"> -T will show Ss a section of the audit reports that includes large numbers. Ss will be asked to read the numbers aloud. -T will explain how to read large numbers in English. <p>Then, T will ask Ss to read more examples of large numbers.</p> <p>Materials: Mmio Studio Presentation, pp 5.</p>	<p>Vocabulary: Large amounts (\$537,432,000, \$13,747,345)</p>	R, S and L	5 minutes

Hand out 1**Activity 5: showing Understanding of an audit report**

Instructions: You are graduating from your new hire training in your new company. They have asked you to confirm your knowledge about the departments' latest audit status. Answer the evaluation below based on the audit report in page 2. Choose True or False based on the information in the report, and provide the correct information for all the false statements. You will have 30 minutes to complete the evaluation. Remember to use scanning.

PVP Assessment form for new hires:

Statements:	True or False	If false, why?
1-The Procurement Card Program was implemented by the Sales department in 2001.		
2-During the years 2010 and 2011, the number of P-Card transactions decreased.		
3-This audit had the purpose of determining whether employees adhered to Municipal policies and P-Card usage procedures.		
4-All generally accepted government auditing standards were followed while conducting the audit.		
5-The majority of employees complied with Municipal policies and procedures regarding the use of P-Cards.		
6-Purchases of food for employee lunch meetings, microwave ovens, picture frames, and parking tickets are not considered questionable purchases according to Municipal policies.		
7-There is not a limit for single transactions.		
8-Policy and Procedure 48-16 states that the use of P-Cards is limited to official Municipal business only.		
9-Mobile communication services and devices were purchased once in large amounts.		
10-Cameras, tools, and communication services and devices were purchased to keep up with the latest technologies.		
11-Municipal Agencies will be reminded of the requirements found in P&P 48-16 and P&P 24-23 in terms of P-Card use.		
12-The P&Ps will be improved alongside a new ERP system.		

Internal Audit Report 2012-08
Annual Municipal Procurement Card Review
Purchasing Department

Introduction. The Purchasing Department implemented the Procurement Card (P-Card) Program in 2001 to provide for the purchase and payment of low-dollar goods and services. According to the Purchasing Department, the number of P-Card transactions increased from 46,403 (\$ 13,747,345) in 2010 to 46,744 (\$ 14,847,827) in 2011. To establish an appropriate level of control over the P-Card program and maintain accountability of public funds Policy and Procedure (P&P) 48-16, MOA Procurement Cards, requires Internal Audit to perform an annual review of controls within the P-Card program. In addition, P&P 24-23, Disallowed Purchases, was implemented in 2009 to provide guidance for disallowed expenditures.

Objective and Scope. The objective of this audit was to determine whether employees adhered to Municipal policies and procedures regarding P-Card use. Our audit included a review of purchases made from January 1, 2011, to December 31, 2011. Specifically, we reviewed purchases of judgmentally selected transactions to ensure compliance with P&P 48-16 and P&P 24-23.

The audit was conducted in accordance with generally accepted government auditing standards, except for the requirement of an external quality control review, and accordingly, included tests of accounting records and such other auditing procedures as we considered necessary in the circumstances. The audit is required by P&P 48-16, Section 7f (1).

Overall Evaluation. Overall, most employees adhered to Municipal policies and procedures regarding the use of P-Cards. However, our review of P-Card transactions during 2011 revealed some instances of questionable or prohibited purchases. Examples of these purchases include food for employee lunch meetings, microwave ovens, a four-burner gas barbeque grill, a park rental for an employee picnic, picture frames, parking tickets, business cards, gasoline, and an AARP membership.

We also noted that items such as cameras, tools, and mobile communication services and devices continue to be purchased year after year, sometimes in large quantities. In addition, some transactions were split to circumvent the \$2,500 single transaction limit. Finally, the purchase of food items for board and commission meetings is unclear and authority to approve P-Card transactions was not always properly carried out or configured in the P-Card system.

FINDINGS AND RECOMMENDATIONS

1. Questionable P-Card Purchases.

- a. Finding. Our review of P-Card transactions during 2011 revealed some instances of questionable or prohibited purchases. For example, Municipal Light & Power (ML&P) purchased food for employee lunch meetings, propane for a staff recognition barbeque, a microwave oven, meal cards for Rotary and Anchorage Chamber of Commerce meetings, and three new printers with various accessories for an office having few staff. Anchorage Water and Waste Water (AWWU) purchased a four-burner gas barbeque grill, a microwave oven, and a park rental for an employee picnic. These purchases were made while ML&P and AWWU were still independent authorities. In addition, other departments paid for picture frames, parking tickets, business cards, gasoline, microwave ovens, and an AARP membership. While the magnitude of these purchases was not significant, they may not be consistent with prudent fiscal management or comply with Municipal policy. Policy and Procedure 48-16 states that P-Cards will only be used to conduct official Municipal business. Policy and Procedure 24-23 states that it is the Municipality of Anchorage's policy that Municipal funds cannot be used for purchases that do not serve the public interest.

We also noted that some items continue to be purchased year after year, sometimes in large quantities. Examples of some of these items include cameras, tools, and communication services and devices. Some of these purchases could be an indication of

employees to keep up with the latest technology or a failure to protect Municipal assets from loss.

- b. Recommendation. The Purchasing Officer should remind all Municipal agencies of the requirements of P&P 48-16 and P&P 24-23.
- c. Management Comments. Management stated, "The Purchasing Director is preparing a memorandum reminding Municipal agencies of the requirements found in P&P 48-16 and P&P 24-23 regarding P-Card use. In addition, in conjunction with the implementation of the new ERP system, the above noted P&Ps are under review and will be revised accordingly."
- d. Evaluation of Management Comments. Management comments were responsive to the audit findings and recommendations.

Adapted from: https://www.muni.org/Departments/internal_audit/2012%20Audit%20Reports/2012-08.PDF

Glossary:

Vocabulary	Definition
Procurement Card (P-Card)	A type of company charge card that used for smaller purchases to achieve greater cost efficiency.
Accountability	The fact or condition of being responsible.
Disallowed Expenditures	Expenses that are not incurred exclusively for business and trade purposes.
Judgmentally	From a critical point of view.
Compliance	Conformity in fulfilling official requirements.
Accordance	In a matter conforming with.
Accounting Records	All of the documents involved in preparing financial statements for a company.
Questionable	Doubtful as regards truth or quality.
Circumvent	Find a way around an obstacle.
Comply	To conform, submit, or adapt (as to a regulation or to another's wishes) as required or requested.

Definitions adapted from: <https://www.merriam-webster.com/>

PowerPoint Presentation

Activity 1: Pronunciation review

- How do you pronounce...?

Pronunciation review

Deposit

Pronunciation review

Requirement

Pronunciation review

Instructions

Pronunciation review

Withdrawal

Pronunciation review

Other

Pronunciation review

Since

Pronunciation review

Customer

Pronunciation review

Research

Pronunciation review

Answer

Today's topic:

Audit Report



- Activity 2: In groups, discuss the questions below. You can look for information on the web if needed. You will have 7 minutes:
- 1. What is an audit report?
- 2. What type of information do you find in an audit report?
- 3. What are the sections of an audit report?
- 4. Why are audit reports important?

Useful Language:

- An audit report is
- In this report, you can find information about...
- The sections of an audit report are...
- Audit reports are important because...

Audit report

- Audit reports are written letters from an auditor containing the opinion of whether a company's financial statements comply with generally accepted accounting principles.
- The sections of an audit report are:
 - *introduction*
 - *objective and scope*
 - *overall evaluation*
 - *findings and recommendations*
 - *management comments*
 - *evaluation of management comments*



Activity 3: Vocabulary

Showing understanding of audit reports

- **Instructions:** You are graduating from your New Hire training in your new company. They have asked you to confirm your knowledge about the departments' latest audit status.
- In groups, answer the evaluation in handout 1. Choose *True* or *False* based on the information in the report.
- Be ready to explain your answers.



- Useful language:
- -Is this true/false?
- -I think this is true/false because...
- -It says in here that...
- -If this is false, then what is the correct information?

Activity 6: Discussing an audit report

- In groups, discuss the following questions about the audit report. You will have 7 minutes
1. What was the audit report about?
 2. In your opinion, what are the most important points mentioned in the report?
 3. Were there any problems with the use of the P-Cards?
 4. What can you do to help employees comply with company policies?

Useful Language:

The report was about...

In my opinion, the most important points were...

I think the problem was that... / I think there were no problems with the use of P-Cards

In order to help employees comply with company policies, you can...

1. A type of company charge card that used for smaller Procurement card purchases to achieve greater cost efficiency.

2. The fact or condition of being responsible. Accountability

3. Expenses that are not incurred exclusively for Disallowed Expenditures business and trade purposes.

4. From a critical point of view. Judgementally

5. Conformity in fulfilling official requirements. Compliance

Activity 3: Matching

Word bank

Activity 4

Reading strategy: Scanning

Scanning is reading rapidly to find specific facts.

-Know what you are looking for (names, dates, numbers, places, etc.).

-Decide on keywords and phrases to search for.



Practice! Try to answer the following questions in 1 minute

1-P&P 24-23 was implemented in 2009.

2-In 2011, there were 46,744 transactions.

3-The P-Card program allows purchases and payments of low-dollar goods and services

Introduction. The Purchasing Department implemented the Procurement Card (P-Card) Program in 2001 to provide for the purchase and payment of low-dollar goods and services. According to the Purchasing Department, the number of P-Card transactions increased from 46,403 (\$ 13,747,345) in 2010 to 46,744 (\$ 14,847,827) in 2011. To establish an appropriate level of control over the P-Card program and maintain accountability of public funds Policy and Procedure (P&P) 48-16, MOA Procurement Cards, requires Internal Audit to perform an annual review of controls within the PCard program. In addition, P&P 24-23, Disallowed Purchases, was implemented in 2009 to provide guidance for disallowed expenditures.



Activity 4

Based on the introduction, what is this audit report about?

Internal Audit Report 2012-08
Annual Municipal Procurement Card Review
Purchasing Department

Introduction. The Purchasing Department implemented the Procurement Card (P-Card) Program in 2001 to provide for the purchase and payment of low-dollar goods and services. According to the Purchasing Department, the number of P-Card transactions increased from 46,403 (\$ 13,747,345) in 2010 to 46,744 (\$ 14,847,827) in 2011. To establish an appropriate level of control over the P-Card program and maintain accountability of public funds Policy and Procedure (P&P) 48-16, MOA Procurement Cards, requires Internal Audit to perform an annual review of controls within the PCard program. In addition, P&P 24-23, Disallowed Purchases, was implemented in 2009 to provide guidance for disallowed expenditures.

Useful Language: This audit report is about... / This report presents information about...

Large amounts in English

Internal Audit Report 2012-08
Annual Municipal Procurement Card Review
Purchasing Department

Introduction. The Purchasing Department implemented the Procurement Card (P-Card) Program in 2001 to provide for the purchase and payment of low-dollar goods and services. According to the Purchasing Department, the number of P-Card transactions increased from 46,403 (\$ 13,747,345) in 2010 to 46,744 (\$ 14,847,827) in 2011. To establish an appropriate level of control over the P-Card program and maintain accountability of public funds Policy and Procedure (P&P) 48-16, MOA Procurement Cards, requires Internal Audit to perform an annual review of controls within the PCard program. In addition, P&P 24-23, Disallowed Purchases, was implemented in 2009 to provide guidance for disallowed expenditures.

Number of transactions in 2010: 46,403 Expenses: \$13,747,345

Number of transactions in 2011: 46,744 Expenses: \$14,847,827

More examples: \$2,700,000 / \$537,432,000 / \$21,934 / \$8,763,500

University of Costa Rica
 Master's Program in TEFL
 English for Business Administration
 Arguedas, Cervantes, Gómez

Date: Nov 11th Lesson Plan # 15
 Student teacher: Lidia Gomez, Luis Cervantes,
 Andrick Arguedas
 Unit # 3: Presenting your Marketing Strategy



Unit Goal: By the end of this course, students will be able to successfully write a marketing mix section (product, price, place, and promotion) of a marketing proposal and present it during a marketing meeting with stakeholders.

General Objective: Successfully present a marketing mix to stakeholder by using effective public speaking strategies and appropriate English grammar and vocabulary.

Specific Objectives: The students will be able to

1. appropriately pronounce useful language chunks relevant for a marketing mix presentation;
2. prepare for a marketing mix presentation by completing a readiness checklist;
3. formally present a marketing mix to stakeholders in a meeting;
4. self-assess their marketing mix presentation by answering a set of questions.

Objectives	Procedures	Language	Strategies	Macro Skills	Time
1	<p>Warm-up</p> <ul style="list-style-type: none"> - T will show a presentation with language chunks for a business presentation. T will model the intonation, clarity, and pace of these chunks. Ss will repeat them. <p>Materials PPT Handout 2.</p> <p>Pre-Task 1</p>	<p>Useful language</p> <ul style="list-style-type: none"> - Can you repeat it one more time? - What is the meaning of this phrase? - How do you pronounce....? 		L, S, R	10min.
2		Useful Language		R, W, S, L	30min.

	<ul style="list-style-type: none"> - In breakout rooms, Ss will prepare for their marketing mix presentations. They will use a checklist in Handout 1 to make sure that they covered all the important aspects and make changes if needed. <p>Materials Handout 1, page 1.</p>	<ul style="list-style-type: none"> - Do we have transitional phrases for all the sections? - Can we practice this part? - I feel ready/I don't feel ready yet. - How do you pronounce this word? 			
3	<p>Main task</p> <ul style="list-style-type: none"> - Ss will present their marketing mix group by group. Ss that are not presenting will assess the presenter by using the checklist in handout 1. T will provide general comments and feedback after each presentation. <p>Materials Handout 1, page 2.</p>	<p>Useful language</p> <ul style="list-style-type: none"> • Should we start now? • Do you have any questions? • Does that make sense? • Would you like me to repeat that? 	R, S, L.	50min.	
4	<p>Post Task</p> <ul style="list-style-type: none"> - In breakout rooms, Ss will self-reflect on their presentations by discussing guiding questions. Then, Ss will share what they discussed in the main room. <p>Materials Handout 1, page 2.</p>	<p>Useful language</p> <ul style="list-style-type: none"> - We talked about.... - We believe we could have.... - We all agree that... - We think that.... 	L, S	10min	

Writing an Audit Report

Activity 2

Read the introduction and answer the questions.

Audit Report

Introduction: This audit report responds to the PVP 2020 yearly audit plan which reviews the human resources process from the company to guarantee the compliance of politics and processes of PVP. This year will be validated the compliance of the new human resources procedures which includes validate applicants backgrounds, authorize vacation days or leave of absence, check salary payments, and validate the return of company's equipment from fired employees. This audit validates the design of the procedure and the correct execution from the human resources personal.

1. What is the purpose of this audit report?
2. What timeframe does this audit report cover?
3. What process are they auditing?

Activity 3

Read the following text and underline the information that is included in the introduction of Activity 2.

Compiled audit information

Audit Context

Last year PVP established a new recruitment process. All this is new for the human resources employees who used to complete these tasks without following specific procedures, for example, validating applicants backgrounds, authorizing vacation days or leave of absence requests, checking salary payments, and validating the return of company's equipment from fired employees. The PVP HR manager is asking his subordinates to correct and complete all information related human resources management processes from this year because this month they have the yearly audit from the headquarters.

Obtained information

20 people were hired, and 6 people were fired.

5 new hires did not provided a requested recommendation letter.

1 new hired has a fake degree

There were 200 vacation requests and 40 leave of absence registered. 30 vacation requests were approved without verifying the available days. 3 leave of absence did no preset valid documentation.

1 employee was paid overtime without previous authorization

The procedure for salary payment does not consider that new employees might not have an account register in the PVP human resource system.

Activity 4

Read the **Compiled audit information** and answer the questions below.

Compiled audit information

Context

An employee of building B reported to the manager of building A that he identified assets that were different from the ones in building B and other items without tags in the offices and cafeteria. He noticed that some of those items are not working properly.

Based on the comment, the manager of building A requested an audit on the assets management.

Obtained information

Audit observation 2020. This document describes the obtained information for the audit of the asset audit performed in July 2020.

- There are 300 desktop computers, and 100 laptops in building A.

- There are 310 ergonomic chairs in building A.
- There are 290 desktop computers, 100 laptops, and 300 ergonomic chairs properly identified with a validated serial number.
- 250 desktop computers and 90 laptops are in good condition and fully functional. All ergonomic chairs are functional.
- There are 50 assets that do not match any style or allowed device. They are not tagged either.
- The cafeteria in the third floor is missing two microwaves and three of them are not properly tagged.
- The fridge on the second-floor cafeteria is defective, there are currently no active purchase orders.

1. What will be the purpose of this audit report?
2. What timeframe will this audit report cover?
3. What process will be audited?

Activity 5

Use the **Compiled audit information** to write the introduction of your audit report. Remember to check the introduction from the previous activities as a model.

PVP assets management audit report

Introduction:

Activity 5

In groups, exchange your introduction and give feedback to your classmates.

Peer-feedback

Did the introduction include the purpose?

Did the introduction include the timeframe?

Did it have any grammar mistakes?



Activity 1: Pronunciation review

• How do you pronounce...?

Pronunciation review

Purchases

Pronunciation review

Expenditures

Pronunciation review

Determine

Pronunciation review

Procedures

Pronunciation review

Questionable

Pronunciation review

Accountability

Pronunciation review

Comply

Pronunciation review

Audit

Pronunciation review

Appropriate

Pronunciation review

Authority

Activity 2: Audit report introduction

- Go page 1
- Read the introduction
- Discuss and answer the questions

- What is the purpose of this audit report?
- What timeframe does this audit report cover?
- What process are they auditing?

Activity 3: Audit report introduction

- Go page 2
- Read the Compiled audit information
- Underline the information included in the introduction

Activity 4: Preparing to write an intro

- Go page 3
- Read the Compiled audit information
- Answer the questions

Activity 5: Preparing to write an intro

- Go page 4
- Use the Compiled audit information to write the introduction of your audit report.

Activity 6: Preparing to write an intro

- Go page 5
- Exchange your introduction with your classmates
- Give feedback



Unit Goal: By the end of this unit, students will be able to successfully show understanding of internal company policies and audit evidence to write a financial audit report and present it in a face-to-face meeting.

General Objective: Accurately write the objectives and scope sections of an audit report based on audit evidence by using appropriate structures, vocabulary, and register.

Specific Objectives: The students will be able to:

1. Successfully identify and correct language mistakes in written audit introductions;
2. accurately show understanding of the main components of the objectives and scope of an audit report;
3. correctly identify the main components of the objectives and scope of an audit report;
4. properly write the objectives and scope of an audit report;
5. appropriately identify and correct language mistakes in the objectives and scope of an audit report.

Objectives	Procedures	Language (Vocabulary, expressions, useful language, grammatical or phonetic features)	Strategies	Macro Skills	Time
1	<p>Warm-up:</p> <p>In the main room, T will show sections of the audit introductions that Ss wrote in the previous class. T will ask Ss to try to identify the language mistakes and correct them.</p>	<p>Useful language:</p> <p>I believe you need to change/remove...</p> <p>I think this is incorrect because....</p>		S, L, R	10 min

	<p>Materials Handout 1 Page 1 https://docs.google.com/document/d/1e7-CKs7LNaOB7pwuKqLFhMfuposSZJ4GV-TJkqWRHIXI/edit#</p>	<p>Could you clarify? There is another mistake. It is all good!</p>		
2	<p>Pre-task 1: In break out rooms, Ss will read the text "Writing Audit Objectives, scope, and criteria of an Audit Report" using handout 1. Then, Ss will discuss the following questions. 1. What could happen if the objectives and scope of an audit report are too general? 2. What are three examples of standard audit objectives? 3. What is included in the scope of an audit report? Then, Ss will discuss the answers with the class in the main room. Materials: Handout 1 Page 2 https://docs.google.com/document/d/1e7-CKs7LNaOB7pwuKqLFhMfuposSZJ4GV-TJkqWRHIXI/edit#</p>	<p>Useful language: If the objectives and scope are too general.... Three examples of standard audit objectives are.... The audit scope is....</p>	R, S, L	15 min

2	<p>Pre-task 2</p> <p>Individually, Ss will read an example of the objectives and scope of an audit report. Then, Ss will discuss the following questions in breakout rooms. Once they have discussed the questions, T will ask them to share the answers in the main room.</p> <ol style="list-style-type: none"> 1. What is the objective of this audit report? 2. What is the physical location where the audit takes place? 3. What is the organization unit involved in the audit? 4. What activities or processes are being audited? 5. What is the time period to be audited? <p>Materials</p> <p>Handout 1, page 4. https://docs.google.com/document/d/1e7-CKs7LNaOB7pwuKqLFhMfuposSZJ4GV-TJkqWRHIXI/edit#</p>			<p>Useful language:</p> <ol style="list-style-type: none"> 1. The objective of this audit report is.... 2. The physical location where the audit takes place is.... 3. The organization unit involved in the audit is.... 4. The activity to be covered is.... 5. The processes covered in the audit report are.... 6. The time period to be audited is.... 	R,W,S,L	20 min.
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3	<p>Pre-task 3</p> <p>In breakout rooms, Ss will read the compiled audit information in handout 1, page 6. Then, they will identify the most appropriate objectives for the audit, and the main components of scope previously studied by answering a set of questions.</p> <p>Materials Handout 1 Page 6. https://docs.google.com/document/d/1e7-CKs7LNaOB7pwuKqLFhMfuposSZJ4GV-TJkqWRHIXI/edit#</p>	Useful language	R, S, L	20 min.
	<p>Useful language</p> <ol style="list-style-type: none"> 1. The objective of this audit report is.... 2. The physical location where the audit takes place is.... 3. The organization unit involved in the audit is.... 4. The activity to be covered is.... 5. The processes covered in the audit report are.... 6. The time period to be audited is.... 	Useful language: The objective of the audit is to... This audit was conducted from [MONTH] to [MONTH] [YEAR].	R, W	30 min.
4	<p>Main Task:</p> <p>Individually, using the <i>compiled audit information</i> from pre task 3, Ss will write the objectives and scope of their audit report. T will monitor Ss while they write the document.</p> <p>Materials Handout 1, page 8.</p>			

6	<p>https://docs.google.com/document/d/1e7-CKs7LNaOB7pwuKqLFhMfuposSZJ4GV-TJkqWRHIXI/edit#</p>	<p>Based on an activity-level risk assessment, the audit covered risk areas related to.....</p>		
	<p>Post task:</p> <p>Using the feedback T collected during the main task, T will share with the class common mistakes and ask students to identify and attempt to correct the mistakes.</p> <p>Materials</p> <p>Hand out 2 https://docs.google.com/document/d/1jHWMHJJHih3-MqU5bQquPhupvncYv02nOEKpc8Q80/edit#</p>	<p>Useful language:</p> <p>I believe you need to change/remove...</p> <p>I think this is incorrect because...</p> <p>Could you clarify?</p> <p>There is another mistake.</p> <p>It is all good!</p>	R,L,S	15 min.

**Welcome to your third class about Audit Reports! Today, we will talk about the
OBJECTIVES and SCOPE sections of an audit report!**

Activity 1!

Instructions: Read the following introductions. Can you identify the language mistake in the underlined sections?

Introduction 1: The next text contains the audit report performed in July 2020 and responds to the asset management that was reviewed by an employee of building B. He analyzed the differences in assets between both buildings. Such as the desktop computers, laptops and ergonomic chairs. Also if they are tagged correctly and that are properly working.

Introduction 2: This audit report responds to the July 2020 PVP assets management. This report contains the information to verify is there is a correct management of the assets of PVP company. It will review the existence of the assets in the two buildings of the company and their location, if they have their tagged and if they are identified with a serial number.

Introduction 3: This audit report responds to the 2020 yearly audit plan which reviews the sales department from the company to guarantee accuracy and proper monitoring of policies. This year will validate the compliance of the new sales department procedures which include backgrounds, sales details, accounts receivable, provisions, inventory information and also salaries of department employees. This audit validates the design of the procedure and the correct execution from the sales department personnel.

**No grammar mistakes here, but what is the area of improvement?

Introduction 4: This audit report responds to the PVP July 2020 audit which reviews the asset management process from the company to verifies the proper manage of the assets from building A. The audit validates that the building A has an appropriate asset manage, that complies with building B. That includes verifying the equipment management of the office, reviewing the tags of items and evaluate if the items are working properly. This audit validates the correct administration, status and registration of the assets from building A.

Activity 2!

Instructions: Read the text and answer the questions below in your breakout rooms!

Writing Audit Objectives, scope, and criteria of an Audit Report

Relevant audit sections must be communicated and understood by all parties involved in the audit. The auditing sections are the step-by-step methods for preparing, performing, reporting, and following up on the

audit. In this article, we will discuss one of the most important preparation or planning activities: the audit objectives and scope.

All individual audits must have documented objectives and scope. Audit objectives, scope should be specific to each individual audit and should not be generic statements that would apply to all process or system audits. If they are too general, they provide very little guidance and could cause confusion and result in inefficient use of resources.. An organization can consider any means or mediums for documenting the information.

There are several example audit objectives included in the standard methodology. Some of the example audit objectives are:

- a. Evaluate the capability of a specific department, project or process to ensure compliance and contractual requirements.
- b. Evaluate the effectiveness of a department, project or process.
- c. Identify areas for potential improvement of a specific department, project or process. In our competitive world in both the public and private sectors, organizations want to improve and make things better.

The audit scope is the extent and boundaries of the audit. This is explained as the: 1) physical location (such as address, plot, floor, area), 2) organization units (such as department or branch), 3) activities and processes (such as marketing, advertising, logistics, assets), and 4) the time period to be covered.

Overall, the audit activities for defining the audit objective and scope should be consistent.

Adapted from: <https://www.qualitywbt.com/auditing-activities-for-defining-objectives-scope-and-criteria/>

Questions activity 2:

- 1. What could happen if the objectives and scope of an audit report are too general?**

- 2. What are three examples of standard audit objectives?**

3. What is included in the scope of an audit report?

Activity 3!

Instructions: Identify the objective type and the elements of the scope in the following text by answering the questions below.



I. AUDIT OBJECTIVE, SCOPE AND METHODOLOGY

1. The objective of the audit was to assess whether UNHCR was implementing and overseeing the audit certification process for

implementing partners in an efficient and cost-effective manner and in accordance with UNHCR's policy requirements.

2. This audit was conducted by the OIOS (Office of Internal Oversight Services) due to the risks associated with the external audit of projects implemented by partners using UNHCR funds.

3. OIOS conducted this audit from August to December 2018. The audit covered the 2016 and 2017 audit cycles, and included audit work done in 11 UNHCR country operations (Afghanistan, Angola, Djibouti, Lebanon, Libya, Malawi, South Sudan, Syria, Tanzania, Uganda and Zambia), in addition to UNHCR headquarters in Geneva and Budapest. OIOS also undertook a desk review of audited projects in three additional country operations (Iraq, Rwanda and Sudan).

4. Based on an activity-level risk assessment, the audit covered risk areas related to: (a) administration of the audit engagement process; (b) selection of projects for audit; (c) performance of auditors and quality assurance at UNHCR headquarters; and (d) effectiveness of the risk-based audit policy.

Adapted from: <https://oios.un.org/file/7920/download?token=gDS9uHxV>

Questions activity 3:

1. **What is the objective of this audit report?**
2. **What is the physical location where the audit takes place?**
3. **What is the organization unit (Office) involved in the audit?**
4. **What activities or processes are being audited?**

5. What is the time period to be audited?

Activity 3

Instructions: Write down the objective type and the elements of the scope in the following compiled audit information by answering the questions below.

Compiled audit information

Context

The new facilities manager of Building A (located in Southlake Union, Seattle) identified some inventory issues in the offices and cafeterias. He reported that some assets were missing, some were not working properly, and others were not properly tagged. Based on these findings, the new facilities manager has requested to the local facilities department an audit to ensure the compliance of the asset process policies of the company.

Obtained information

Audit observation 2020. This document describes the obtained information for the audit of the asset audit performed in July 2020.

- *There are 300 desktop computers, and 100 laptops in building A.*
- *There are 310 ergonomic chairs in building A.*
- *There are 290 desktop computers, 100 laptops, and 300 ergonomic chairs properly identified with a validated serial number.*
- *250 desktop computers and 90 laptops are in good condition and fully functional. All ergonomic chairs are functional.*
- *There are 50 assets that do not match any style or allowed device. They are not tagged either.*
- *The cafeteria in the third floor is missing two microwaves and three of them are not properly tagged.*
- *The fridge on the second-floor cafeteria is defective, there are currently no active purchase orders.*

Write down the required information for your objectives and scope:

1. What is the process, project, or department to be audited?

2. Choose the audit objective that would best suit this audit:

- a. Evaluate the capability of a specific department, project or process to ensure compliance and contractual requirements.
- b. Evaluate the effectiveness of a department, project or process.
- c. Identify areas for potential improvement of a specific department, project or process. In our competitive world in both the public and private sectors, organizations want to improve and make things better.

Identify the elements needed to define the scope:

- 1) physical location (such as address, plot, floor, area):
- 2) organization units (such as department or branch):
- 3) activities and processes (such as marketing, advertising, logistics, assets):
- 4) the time period to be covered:

Activity 4: Main task

Instructions: Write the objectives and the scope (be specific) based on the compiled audit information you read on **Activity 3**.

Useful language:

- The objective of the audit is to...
- This audit was conducted from [MONTH] to [MONTH] [YEAR].
- Based on an activity-level risk assessment, the audit covered risk areas related to.....

Objective:

Scope:

University of Costa Rica
 Master's Program in TEFL
 English for Business Administration
 Arguedas, Cervantes, Gómez

Date: September 30th Lesson Plan # 8
 Student teacher: Andrick Arguedas
 Assistant: Lidia Gomez
 Unit # 2: Presenting Your Audits



Unit Goal: By the end of this unit, students will be able to successfully show understanding of internal company policies and audit evidence to write a financial audit report and present it in a face-to-face meeting.

General Objective: Accurately write the findings and recommendations section of an audit report based on audit evidence by using appropriate structures, vocabulary, and register.

Specific Objectives: The students will be able to:

1. successfully identify and correct language mistakes in the objectives and scope section of an audit report;
2. accurately show understanding of the main components of the findings and recommendations section of an audit report;
3. correctly identify the main components of the findings and recommendations section of an audit report;
4. properly write the findings and recommendations section of an audit report;
5. appropriately identify and correct language mistakes in the findings and recommendations section of an audit report.

Objectives	Procedures	Language (Vocabulary, expressions, useful language, grammatical or phonetic features)	Strategies	Macro Skills	Time
1	Warm-up: In the main room, T will show Ss pairs of sentences they wrote during the previous class. One sentence will have a grammar mistake and the other will be its corrected version. Ss will read the two sentences and will try to identify which sentence is	Useful language: I believe you need to change/remove...		S, L, R	10 min

	<p>correct. Ss will be asked to explain why the correction is needed.</p> <p>Materials Power Point Presentation. Pages 3-8</p>	<p>I think this is incorrect because...</p> <p>The mistake is...</p> <p>You should say ... instead of ...</p>			
2	<p>Pre-task 1:</p> <p>In break out rooms, Ss will read a text explaining the main components of the findings and recommendations section of an audit report. Then, Ss will discuss the following questions:</p> <ol style="list-style-type: none"> 1-What type of information is included in the findings section? 2-Why is factual information included in the findings section? 3-What type of information is included in the recommendations section? 4-Why should the recommendations be specific? <p>After this, Ss will share their answers in the main room.</p> <p>Materials: Handout 1. Page 1</p>	<p>Useful language:</p> <p>The findings section includes information about...</p> <p>Factual information is included because...</p> <p>The recommendations section includes information about...</p> <p>The recommendations should be specific because...</p>		R, S, L	15 min

2 and 3	<p>Pre-task 2</p> <p>Individually, Ss will read an example of the findings and recommendations section of an audit report. Then, Ss will discuss the reading comprehension questions in Activity 3, Handout 1 in breakout rooms.</p> <p>Once they have discussed the questions, T will ask them to share their answers in the main room.</p> <p>Materials</p> <p>Handout 1, pages 2-3.</p>	<p>Useful language:</p> <p>There <i>is/isn't</i> a title in this section.</p> <p>The findings section <i>includes/does</i> not include factual information</p> <p>Some examples of policies included in this section are...</p> <p>This section <i>does/doesn't</i> include the sample verified out of the population.</p> <p>The recommendations <i>call/don't call</i> for action because...</p> <p>The recommendations <i>are/aren't</i> specific because...</p> <p>The three departments that have to follow recommendations are...</p>	R, W, S, L	20 min.
3 and 4	<p>Pre-task 3</p> <p>In breakout rooms, Ss will read the audit evidence and asset policies in Activity 4, handout 1. Then, Ss will try to identify 4</p>	<p>Useful language</p> <p>Do you think this is a policy infringement?</p>	R, W, S, L	25 min.

	<p>policy infringements reported on the audit evidence and write 4 recommendations for the Facilities Department.</p> <p>Materials Handout 1 Pages 4-5.</p>	<p>Does this comply with AP-___? The audit evidence suggests that According to AP-___, assets should be... The Facilities Department should... There missing assets are... The untagged assets are... AP-___ states that...</p>		
4	<p>Main Task: Individually, using the <i>information they collected during</i> pre-task 3, Ss will write the findings and recommendations of their audit reports following the instructions of Activity 5, Handout 1. T will monitor Ss while they write their documents.</p> <p>Materials Handout 1, page 6.</p>	<p>Useful language: The audit evidence suggests that... According to AP-___, assets should be... The Facilities Department should... There missing assets are... The untagged assets are... AP-___ states that...</p>	R, W	30 min.
5	<p>Post task: Using the feedback T collected during the main task, T will share with the class common mistakes and ask Ss to identify and attempt to correct them.</p> <p>Materials Zoom's whiteboard feature</p>	<p>Useful language: I believe you need to change/remove... I think this is incorrect because...</p>	R,L,S	10 min.

Findings and Recommendations

Activity 2: Findings and Recommendations of Audit Reports

Instructions: In groups, read the following information about the information that is included in the findings and recommendations section of an audit report. Then, discuss the questions below.

● **Findings:** This section should cover the detailed finding revealed during the course of the audit. This section should start with a brief title of the observation and then followed with the detailed narration. Factual information in figures, amounts, quantity, etc. should be reported here to validate the observation and emphasize the impact of this finding. It is also beneficial to add the sample verified out the total population; for example, we verified a total of 100 vouchers out of 1000 and observed that for 50 vouchers the supporting documents were improper. Finally, refer to relevant company policies if the findings address their compliance.

● **Recommendations:** These are suggested corrective action plans that the internal audit department recommends the audit management team to execute so that the impact of the observations is reduced/mitigated. They call for action to existing conditions or improve operations. These recommendations may suggest approaches to correcting or enhancing performance as a guide for management in achieving desired results. The recommendations should be specific, identify the person who should take action, and be very brief and precise.

Adapted from: <http://www.internalauditor.me/article/tips-on-writing-internal-audit-reports/>

1-What type of information is included in the findings section?

A-

2-Why is factual information included in the findings section?

A-

3-What type of information is included in the recommendations section?

A-

4-Why do you think the recommendations need to be specific? Use your own ideas

A-

Activity 3: Sample Findings and Recommendations

Instructions: In groups, read the following findings and recommendations sections. Then, answer the questions below.

Findings:

1. Questionable P-Card Purchases.

Our review of P-Card transactions during 2011 revealed some instances of questionable or prohibited purchases. For example, Municipal Light & Power (ML&P) purchased food for employee lunch meetings, propane for a staff recognition barbeque, a microwave oven, meal cards for Rotary and Anchorage Chamber of Commerce meetings, and three new printers with various accessories for an office having few staff. Anchorage Water and Waste Water (AWWU) purchased a four-burner gas barbeque grill, a microwave oven, and a park rental

for an employee picnic. These purchases were made while ML&P and AWWU were still independent authorities. In addition, other departments paid for picture frames, parking tickets, business cards, gasoline, microwave ovens, and an AARP membership. While the magnitude of these purchases was not significant, they may not be consistent with prudent

fiscal management or comply with Municipal policy. Policy and Procedure 48-16 states that

P-Cards will only be used to conduct official Municipal business. Policy and Procedure 24-23

states that it is the Municipality of Anchorage's policy that Municipal funds cannot be used for purchases that do not serve the public interest.

Adapted from: https://www.muni.org/Departments/internal_audit/2012%20Audit%20Reports/2012-08.PDF

1-Does this findings section start with a title?

A-

2-Does it include factual information (figures, amounts, assets, etc.)? If so, what are some examples?

A-

3-Does it cite policies? If so, what are some examples?

A-

4-Does this section include the sample verified out of the population?

A-

Recommendations:

Proper action is required within three months to ensure that the International Organization

for Migration (IOM) will not be affected in its ability to achieve its strategic and operational objectives. In addition, these recommendations aim to ensure that the assets of IOM are properly safeguarded.

The High Priority recommendations are presented below:

A. The Country Office should develop internal instructions to enhance regulatory procedures and achieve a higher degree of compliance with IOM's Regulations and Rules. In addition, the Country Office ought to confirm that all personnel files contain all the required documents.

B. Procurement and Logistics should ensure full compliance with IOM regulations on Medical Service Plan.

C. It is recommended that Programme and Operations establish a sound project financial monitoring system and continue its efforts to secure additional funding and correct errors in the sustainability reports.

Adapted from: https://www.iom.int/sites/default/files/about-iom/audit/mw201701-iom_lilongwe.pdf

Questions

1-Do the recommendations call for action to improve operations? Justify your answer.

A-

2-Are the recommendations specific? Justify your answer.

A-

3-What are the 3 departments that have to follow the recommendations?

A-

Activity 4: Audit Evidence

Instructions: In groups, read the following audit evidence and Asset Policies(AP). Then, identify 4 instances in which Asset Policies were not followed and complete the charts below. Then write recommendations for each of the instances according to the APs.

Compiled Audit Evidence

Context

The new facilities manager of Building A (located in Southlake Union, Seattle) identified some inventory issues in the offices and cafeterias. He reported that some assets were missing, some were not working properly, and others were not properly tagged. Based on these findings, the new facilities manager has requested an audit to ensure the compliance of the asset process policies of the company.

Assets Report

Audit observation 2020. This document describes the obtained information on the asset management audit performed in July 2020.

-Building A is equipped with 300 desktop computers and 100 laptops.

- Building A is equipped with 310 ergonomic chairs in building A.
- There are 290 desktop computers, 100 laptops, and 300 ergonomic chairs properly tagged with a validated serial number.
- 50 desktop computers and 10 laptops are not functional. 4 ergonomic chairs are broken.
- There are 50 assets (including personal laptops and tablets) that do not match the criteria of allowed devices. They are not tagged either.
- The cafeteria on the third floor is missing one microwave and another is not properly tagged.
- The fridge on the second-floor cafeteria is defective, there are currently no active purchase orders.

PVP Asset Policies (AP)

AP-1. All assets free of tax must be properly tagged with a serial number in a visible place. If an asset is not tagged, the Facilities Department should report it to the Asset Management Department.

AP-2. Cafeterias in building A must have at least two microwaves. Any missing microwaves should be replaced immediately.

AP-3. All cafeterias in building A must have at least one functional fridge.

AP-4. All the equipment in building A must be in good condition at all times. If there is any broken equipment, the facilities department must open a maintenance ticket to report the damage.

AP-5. If the facilities department identifies that there is no fix for the assets (for example a clearly broken chair) they should open a purchasing order (PO) instead.

AP-6. No equipment outside of the allowed devices should be inside building A. Any non-compliant devices will be taken to the Security Office.

Findings:

Factual Information of situations that shows lack of compliance of Asset Policies (From the Asset Report section)	Asset Policy that was not followed
A-(Example)10 desktop computers are not properly identified with a validated serial number	AP-1
B-	
C-	

D-	
E-	

Recommendations: (Use the information from the Asset Policies)

A-(Example) The facilities department should ensure all desktop computers are tagged in compliance with AP-1.
B-
C-
D-
E-

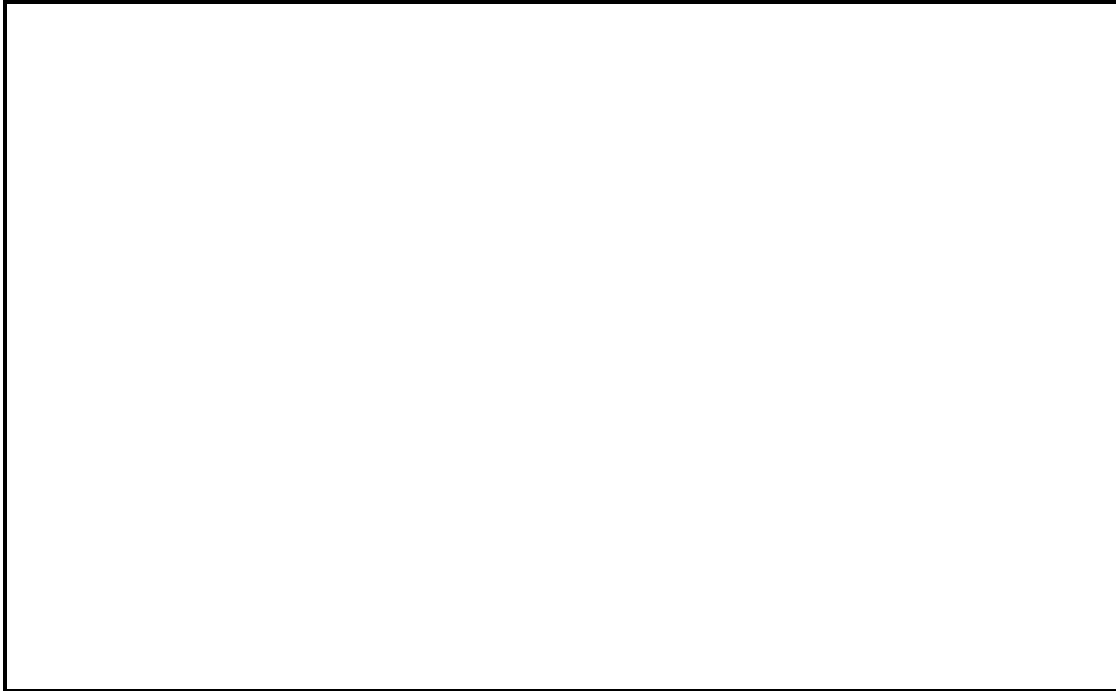
Useful language:

- Do you think this is a policy infringement?
- Does this comply with AP-__?
- The audit evidence suggests that...
- According to AP-2, assets should be...
- The Facilities Department should...
- The missing assets are...
- The untagged assets are...
- AP-5 states that...
- The Facilities Department should... in compliance with...

Activity 5: Writing the Findings and Recommendations section

Instructions: Using the information collected during activity 4, write the Findings and Recommendations section of your audit report. Additionally, Use the information from Activity 2 and the sample sections from Activity 3 as a guide.

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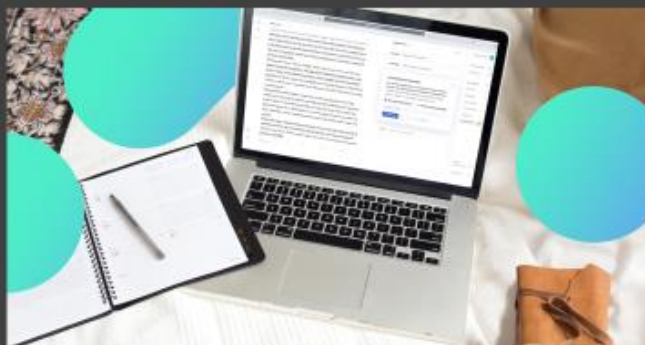
**Useful language:**

- This audit revealed that...
- It was reported that...
- The audit evidence suggests that...
- According to AP-2, assets should be...
- The Facilities Department should...
- The missing assets are...
- The untagged assets are...
- AP-5 states that...
- The Facilities Department should... in compliance with...

PowerPoint Presentation

Lesson 8

AUDIT REPORTS



Activity 1 - Feedback

Instructions: Read the sentences and choose the correct one



Activity 1 - Feedback

Instructions: Read the sentences and choose the correct one



1-“The objective of this audit report is to evaluate the capability of a...”

2-“The objective of this audit report is evaluate the capability of a...”

Activity 1 - Feedback

Instructions: Read the sentences and choose the correct one

1-“The objective of the audit is to evaluate the capability of the local facilities department to ensure the correct assets management.”



2-“The objective of the audit is to evaluate the capability of the local facilities department to ensure the correct asset management.”

Activity 1 - Feedback

Instructions: Read the sentences and choose the correct one

1- "This audit was conducted from July 2020."



2- "This audit was conducted in July 2020."

Activity 1 - Feedback

Instructions: Read the sentences and choose the correct one

1- "The objective of the audit is compliance of the asset process policies of the company."



2- "The objective of the audit is to ensure the compliance of the asset process policies of the company."

Activity 1 - Feedback

Instructions: Read the sentences and choose the correct one

1-“Based on a requisition of the facilities manager, the audit covered risk areas related to asset management.”



2-“Following a request from the facilities manager, the audit covered risk areas related to asset management.”

Activity 2: -Handout 1 -Page 1

Activity 2: Findings and Recommendations of Audit Reports

Instructions: In groups, read the following information about the information that is included in the findings and recommendations section of an audit report. Then, discuss the questions below.

- Findings:** This section should cover the detailed finding revealed during the course of the audit. This section should start with a brief title of the observation and then followed with the detailed narration. Factual information in figures, amounts, quantity, etc. should be reported here to validate the observation and emphasize the impact of this finding. It is also beneficial to add the sample verified out the total population; for example, we verified a total of 100 vouchers out of 1000 and observed that for 50 vouchers the supporting documents were improper. Finally, refer to relevant company policies if the findings address their compliance.
- Recommendations:** These are suggested corrective action plans that the internal audit department recommends the audit management team to execute so that the impact of the observations is reduced/mitigated. They call for action to existing conditions or improve operations. These recommendations may suggest approaches to correcting or enhancing performance as a guide for management in achieving desired results. The recommendations should be specific, identify the person who should take action, and be very brief and precise.

Adapted from: <http://www.iftomails.com/mails/ckoffice-on-netting-internal-audit-reports/>

1-What type of information is included in the findings section?

A-

2-Why is factual information included in the findings section?

A-

3-What type of information is included in the recommendations section?

A-

4-Why do you think the recommendations need to be specific? Use your own ideas

A-

Activity 3:
-Handout 1
-Pages 2 and 3

Activity 3: Sample Findings and Recommendations

Instructions: In groups, read the following findings and recommendations sections. Then, answer the questions below.

Findings:

1. Questionable P-Card Purchases

Our review of P-Card transactions during 2011 revealed some instances of questionable or prohibited purchases. For example, Municipal Light & Power (ML&P) purchased food for employee lunch meetings, propane for a staff recognition barbecue, a microwave oven, meal cards for Rotary and Anchorage Chamber of Commerce meetings, and three new printers with various accessories for an office having few staff. Anchorage Water and Waste Water (AWWU) purchased a four-burner gas barbecue grill, a microwave oven, and a park rental for an employee picnic. These purchases were made while ML&P and AWWU were still independent authorities. In addition, other departments paid for picture frames, parking tickets, business cards, gasoline, microwave ovens, and an AARP membership. While the magnitude of these purchases was not significant, they may not be consistent with prudent fiscal management or comply with Municipal policy. Policy and Procedure 48-16 states that P-Cards will only be used to conduct official Municipal business. Policy and Procedure 24-23 states that it is the Municipality of Anchorage's policy that Municipal funds cannot be used for purchases that do not serve the public interest.

Adapted from: http://www.muni.org/Departments/Internal_audit/2012%20Audit%20Reports/2012-08_PDF

1-Does this findings section start with a title?

A-

2-Does it include factual information (figures, amounts, assets, etc.)? If so, what are some examples?

A-

3-Does it cite policies? If so, what are some examples?

A-

4-Does this section include the sample verified out of the population?

A-

Activity 4: Audit Evidence

AP-1. All assets free of tax must be properly tagged with a serial number in a visible place. If an asset is not tagged, the Facilities Department should report it to the Asset Management Department.

Assets Report

Audit observation 2020. This document describes the obtained information on the asset management audit performed in July 2020.

-Building A is equipped with 300 desktop computers and 100 laptops.

-Building A is equipped with 310 ergonomic chairs in building A.

-There are 290 desktop computers, 100 laptops, and 300 ergonomic chairs properly tagged with a validated serial number.

Findings:

Factual Information of situations that shows lack of compliance of Asset Policies (From the Asset Report section)	Asset Policy that was not followed
10 desktop computers and 10 chairs are not properly tagged	AP-1

Activity 4: Audit Evidence

AP-1. All assets free of tax must be properly tagged with a serial number in a visible place. If an asset is not tagged, the Facilities Department should report it to the Asset Management Department.

Findings:	
Factual Information of situations that shows lack of compliance of Asset Policies (From the Asset Report section)	Asset Policy that was not followed
A-(Example)10 desktop computers are not properly identified with a validated serial number	AP-1
Recommendations: (Use the information from the Asset Policies)	
A The Facilities Department should report all desktop computers are tagged in compliance with AP-1.	

University of Costa Rica
 Master's Program in TEFL
 English for Business Administration
 Arguedas, Cervantes, Gómez

Date: October 7th Lesson Plan # 9
 Student teacher: Lidia Gómez
 Assistant/s: Luis Cervantes
 Unit # 2: Presenting your Audits



Unit Goal: By the end of this course, students will be able to successfully show understanding of internal company policies and audit evidence to write a financial audit report and present it in a face-to-face meeting.

General Objective: Accurately present an audit report in a formal meeting with stakeholders.

Specific Objectives: The students will be able to

1. appropriately pronounce words related to audit reports;
2. correctly identify useful language used to present audit reports by watching a video and answering embedded questions;
3. accurately prepare a presentation of an audit report by completing a template with key words from their text;
4. accurately present an audit report in a formal meeting with stakeholders;
5. appropriately provide feedback to peers on audit report presentations.

Objectives	Procedures	Language	Strategies	Macro Skills	Time
1	<p>Warm-up</p> <ul style="list-style-type: none"> -T will show Ss a PowerPoint presentation with words they mispronounced during the previous lesson. -One by one, Ss will be asked to pronounce the words correctly. -T will correct Ss' pronunciation if necessary. <p>Materials</p>	<p>Useful language</p> <ul style="list-style-type: none"> - The correct pronunciation of that words is <i>audit</i>. - I don't know how to pronounce that word. - What's the meaning of that word? <p>Vocabulary</p>		L, S	15 min

2	<p>Power Point Presentation and handout p.1</p>	<p>Brief, revealed, management, prohibited, currently, functional, tagged, equipment, allowed, purchasing.</p>		
2	<p>Pre-task 1 - Individually, Ss will watch a video and identify useful language used to present audit reports. Then, T will ask students to share their answers.</p> <p>Materials Video https://edpuzzle.com/media/5f7bbeb19019584098ff2fb8</p>	<p>Useful language</p> <ul style="list-style-type: none"> - I think the first / second / third / option is correct. - I am not sure what the correct answer is. - I have a different answer for <i>number 2</i>. 	R, L, S	15 Min
2	<p>Pre-task 2 - T will provide a Power Point Presentation template to organize the audit report presentation. - In pairs, working in breakout rooms, students will prepare the presentation of the audit report they wrote during this unit in breakout rooms.</p> <p>Materials Power Point Presentation template</p>	<p>Useful language</p> <ul style="list-style-type: none"> - What should we write in this slide? - I think we should include the <i>objectives</i>. - I can present the <i>first two</i> slides. - Do you want to <i>start</i> the presentation? - What type of information should we include in this section? 	R, L, S, W	25 min

4	<p>Main task</p> <ul style="list-style-type: none"> - In pairs, Ss will present their audit report in the main room. - While the students are presenting, the rest of the class will complete a peer feedback form to evaluate their classmates' presentation. <p>Materials</p> <p>Students' audit reports and their power point presentation</p> <p>Post Task</p> <ul style="list-style-type: none"> - Ss will share their feedback on their classmates' presentations. <p>Materials:</p> <p>Handout p.6</p>	<ul style="list-style-type: none"> - What phrases can we use to introduce this section. - I think we should add this information. <p>Vocabulary</p> <ul style="list-style-type: none"> - Common business meeting expressions - starting a presentation, - introducing sections of a presentation, - giving the floor to a co-presenter, - ending a presentation. <p>Useful language</p> <ul style="list-style-type: none"> - Group number 1 mentioned all the requested information. - They described all the findings in detail. 	L, S	40 min		
5						

Class 9 – Presenting your Audit Report

Activity 1

Identify the correct pronunciation of the following words.

1. Brief: a concise statement or summary.
2. Revealed: made known to others.
3. Management: the process of dealing with or controlling things or people.
4. Prohibited: that has been forbidden; banned.
5. Currently: at the present time.
6. Functional: designed to be practical and useful.
7. Tagged: attach a label to.
8. Equipment: necessary items for a particular purpose.
9. Allowed: given permission to do something.
10. Purchasing: acquire (something) by paying for it.

Useful language

- The correct pronunciation of that words is *audit*.
- I don't know how to pronounce that word.
- What's the meaning of that word?
- Can you repeat it?
- I couldn't hear.

Activity 2

Watch the following video and identify useful language to start and conclude a presentation and connect ideas.

Video: <https://edpuzzle.com/media/5f7bbeb19019584098ff2fb8>

Common business meeting expressions

Starting a presentation	<p>Good morning / afternoon Hello everyone, thank you for joining. Hello, it is a pleasure to be here. Hello! Welcome everyone! Good morning, happy to be here</p> <p>Today we're here to discuss Today I would like to outline our plans Today we are presenting our audit report</p>
Introducing sections of a presentation	<p>Regarding the <i>objectives</i> Talking about <i>recommendations</i> Now let's move to the first part of my talk which is about Let's move to <i>objectives</i></p>
Giving the floor to a co-presenter	<p>You may continue Now, I'm going to give the floor to <i>Luis</i> <i>Luis</i>, can you tell us more about <i>Findings</i>? And now we are going to listen to <i>Luis</i></p>
Ending a presentation	<p>That would be all for this meeting. That will be all for today. That was our last topic, thank you everyone for coming.</p> <p>All right, it looks like we've covered the main items on the agenda. Thank you so much for your attention; I will be more than glad to answer any of your questions.</p>

Useful language to discuss the answers

- I think the correct answer is *number 1*.
- I am not sure what the correct answer is.
- I have a different answer for *number 2*.

Activity 3

In pairs, use the Power Point Presentation template to prepare the presentation for your audit report.



General guidelines:

- Include only relevant information
- Use bullet points with keywords
- Follow the points as indicated in the template

Useful language

- What should we write in this slide?
- I think we should include the *objectives*.
- I can present the *first two* slides.
- Do you want to *start* the presentation?
- What type of information should we include in this section?
- What phrases can we use to introduce this section?
- I think we should add this information

Activity 4

Part A – When you are a presenter

You are about to join a formal meeting where you need to present your audit report to the PVP board of directors.

Use the Power Point Presentation to present your audit report with your partner.

General Guidelines

- Avoid reading the information
- There should be equal participation among the presenters
- Presentations should not exceed six minutes

Part B – When you are the audience

Listen to your classmates presenting their audit report and complete the **Audit Report Presentation Form**. Write **Yes** if they comply with the statements and **No** if they don't.

Use the Comments section to write any additional comment you have.

Complete one form per group. Write the group number.

Group #

Audit Report Presentation form	Yes / No	Comments
The opening of the presentation was clear.		
The presenters mentioned in the introduction the purpose, timeframe, and audited process.		
The presenters mentioned the objectives of the audit report.		
The presenters included in the scope the physical location, organization units, audited processes and time covered.		
The presenters stated factual information and their corresponding policies in the findings section.		
The presenters described specific and precise recommendations, mentioning the identify person who should take action.		
The presentation ended with a clear closing.		
I was able to understand the presenters fully.		

Group #

Audit Report Presentation form	Yes / No	Comments
The opening of the presentation was clear.		
The presenters mentioned in the introduction the purpose, timeframe, and audited process.		
The presenters mentioned the objectives of the audit report.		
The presenters included in the scope the physical location, organization units, audited processes and time covered.		
The presenters stated factual information and their corresponding policies in the findings section.		
The presenters described specific and precise recommendations, mentioning the identify person who should take action.		

The presentation ended with a clear closing.		
I was able to understand the presenters fully.		

Group #

Audit Report Presentation form	Yes / No	Comments
The opening of the presentation was clear.		
The presenters mentioned in the introduction the purpose, timeframe, and audited process.		
The presenters mentioned the objectives of the audit report.		
The presenters included in the scope the physical location, organization units, audited processes and time covered.		
The presenters stated factual information and their corresponding policies in the findings section.		
The presenters described specific and precise recommendations, mentioning the identify person who should take action.		
The presentation ended with a clear closing.		
I was able to understand the presenters fully.		

Activity 5

Share with your classmates the information you collected in the **Audit Report Presentation Form**.

CLASS 9

Presenting your Audit Report

Activity 1: Pronunciation review

• Handout page 1

Pronunciation review

Brief

- **Useful language**
- The correct pronunciation of that words is *brief*.
- I don't know how to pronounce that word.
- Can you repeat it?
- I couldn't hear it.

Pronunciation review

Revealed

- **Useful language**
- The correct pronunciation of that words is *revealed*.
- I don't know how to pronounce that word.
- Can you repeat it?
- I couldn't hear it.

Pronunciation review

Management

- **Useful language**
- The correct pronunciation of that words is *management*.
- I don't know how to pronounce that word.
- Can you repeat it?
- I couldn't hear.

Pronunciation review

Prohibited

- **Useful language**
- The correct pronunciation of that words is *prohibited*.
- I don't know how to pronounce that word.
- Can you repeat it?
- I couldn't hear it.

Pronunciation review

Currently

- **Useful language**
- The correct pronunciation of that words is *currently*.
- I don't know how to pronounce that word.
- Can you repeat it?
- I couldn't hear it.

Pronunciation review

Functional

- **Useful language**
- The correct pronunciation of that words is *functional*.
- I don't know how to pronounce that word.
- Can you repeat it?
- I couldn't hear it.

Pronunciation review

Tagged

- **Useful language**
- The correct pronunciation of that words is *tagged*.
- I don't know how to pronounce that word.
- Can you repeat it?
- I couldn't hear it.

Pronunciation review

Equipment

- **Useful language**
- The correct pronunciation of that words is *equipment*.
- I don't know how to pronounce that word.
- Can you repeat it?
- I couldn't hear.

Pronunciation review

Allowed

- **Useful language**
- The correct pronunciation of that words is *allowed*.
- I don't know how to pronounce that word.
- Can you repeat it?
- I couldn't hear it.

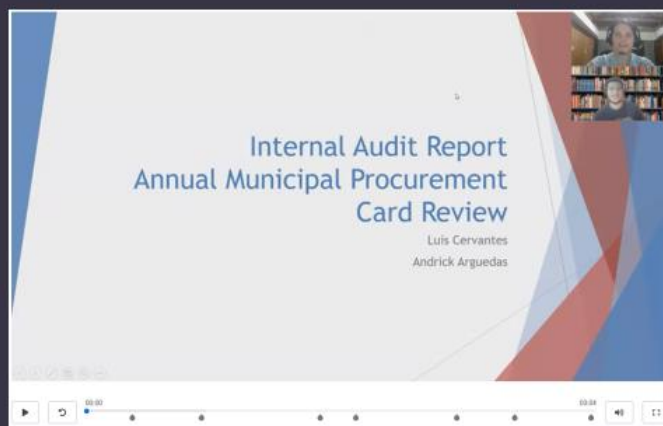
Pronunciation review

Purchasing

- **Useful language**
- The correct pronunciation of that words is *purchasing*.
- I don't know how to pronounce that word.
- Can you repeat it?
- I couldn't hear it.

Activity 2: Video

• Handout page 2



- Watch the video of two experts presenting an audit report.
- Listen carefully and answer the questions that pop-up during the video.

Useful language to discuss the answers

- I think the correct answer is *number 1*.
- I am not sure what the correct answer is.
- I have a different answer for *number 2*.

Video

1. What phrases did Luis use to open the meeting?

- Welcome everyone, thank you for joining. As you know, this meeting is to talk about our...

2. What phrase did Luis use to introduce the purpose of the audit report?

- The reason why we conducted this audit report was...

3. What did Luis say to give the floor to Andrick?

- Andrick, you may continue.

4. What was Andrick's opening sentence?

- Regarding the scope of this audit, its important to keep in mind that...

Video

5. What was the opening phrase for the findings section?

- In terms of findings, we were able to find...

6. What phrase did Andrick use to relate the factual information with the policy?

- According to procedure 24 and 48 these are disallowed purchases.

7. What phrase did Luis use to finish the meeting?

- This would be the end of the presentation; I will be more than happy to answer any questions.

Activity 3: Preparing your presentation

• Handout page 3

Preparing your presentation



In pairs, use the Power Point Presentation template to prepare the presentation for your audit report.

General guidelines:

- Include only relevant information
- Use bullet points with keywords
- Follow the points as indicated in the template

Activity 4: Presenting your audit report

• Handout page 4

Presenting your audit report

When you are presenting

You are about to join a formal meeting where you need to present your audit report to the PVP board of directors.

Use the Power Point Presentation to present your audit report with your partner.

General Guidelines

- Avoid reading the information
- There should be equal participation among the presenters
- Presentations should not exceed six minutes

When you are listening to your classmates' presentation

- Complete the Audit report presentation form

Activity 5: Peer feedback

• Handout page 6

Thank you!



Unit Goal: By the end of this course, students will be able to successfully write a marketing mix section (product, price, place, and promotion) of a marketing proposal and present it during a marketing meeting with stakeholders.

General Objective: Show understanding of a marketing mix section by participating in a discussion following business format standards and correct English grammar and vocabulary.

Specific Objectives: The students will be able to

1. appropriately do research on online sources for specific information related to marketing;
2. show understanding of the different sections of a marketing mix;
3. show understanding of the content of the sections of a marketing mix;
4. actively participate in a discussion related to the marketing mix of a specific company.

Objectives	Procedures	Language	Strategies	Macro Skills	Time
<p>1</p> <p>Warm-up -T will ask students to use Google to research two marketing related questions. 1. What is marketing? 2. What is a marketing mix? -Ss will discuss their findings in the main room.</p> <p>Materials Handout 1 Page 1</p>	<p>Useful language</p> <ul style="list-style-type: none"> - I was able to find that a marketing mix is... - I was/was not able to find a lot of information about this. 	<p>L, S, R</p>	<p>15 min</p>		

2	<p>Pre-task 1</p> <p>- In pairs, Ss will read the article "The 4 P's of Marketing Mix and how to master it in today's world" and investigate the underlined sections for meaning and pronunciation. Then, Ss will answer the following questions and discuss them in the main room:</p> <ol style="list-style-type: none"> 1. <i>What could happen if a company doesn't have a defined marketing mix?</i> 2. <i>What is the primary purpose of a marketing mix?</i> 3. <i>Why is the product section important for the marketing mix?</i> 4. <i>Why is the price section important for the marketing mix?</i> 5. <i>Why is the place section important for the marketing mix?</i> 6. <i>Why is the promotion section important for the marketing mix?</i> <p>Note: Some questions are opinion questions and their answers are not found in the text. Students are expected to produce their own answers.</p> <p>Materials Handout 1 Page 1</p>	<ul style="list-style-type: none"> - It was difficult to understand the information I found. <p>Useful language</p> <ul style="list-style-type: none"> - I do not understand the question. - I would like to answer that one. - Can you help me answer this question? - Let's work together! - Let's divide the questions. - I think the [section] is important because.... - I cannot think of anything, what about you? 	<p>Strategy:</p> <p>Adding context to Google searches for more accurate results:</p> <p>"What does "button line mean in business?"</p> <p>What does "consumer" mean in business?</p>	R, L, S	25 Min
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3	<p>Pre-task 2 Ss will read the "MARIO'S Plumber <i>marketing mix elements strategy</i>" and identify words or phrases that they don't know the meaning or pronunciation of. Ss will share their answers with their instructor in the main room.</p> <p>2. T will collect all the relevant phrases and words in Handout 1, then Ss will be assigned a portion of these words and phrases for them to investigate. Ss will need to teach the rest of the class what their meaning is and how to pronounce them if needed.</p> <p>Materials Handout 1 Page 5 Handout 2: https://docs.google.com/document/d/10ihRRz_cG66nyVdvl0CPbng6YebhOrbFhE2wmeEjSdY/edit</p>	<p>Useful language</p> <ul style="list-style-type: none"> - I tried to research but couldn't find anything relevant. - I was able to find the answer! - I found the answer but I am not sure, please correct me if I am wrong. - I found two possible answers. Can you help me clarify? - I need some additional time. 	R, L, S, W	25 min
3	<p>Main task</p> <ul style="list-style-type: none"> - In pairs, Ss will show understanding of the main ideas of a marketing mix by answering the questions below. Note: Ss will be asked to try to use their own words to answer instead of copying and pasting the answers from the text. 	<p>Useful Language</p> <ul style="list-style-type: none"> - Do you see the answer to this question? - Can you think of a different way to say this? 	R, W, L, S	40 min

	<ol style="list-style-type: none"> 1. What are MARIO'S Plumber services? 2. What are some good qualities of these services (also called competitive advantage)? 3. What are some pricing strategies implemented by MARIO'S Plumber? 4. Where are three ways in which MARIO'S Plumber can be found? 5. How important is MARIO'S Plumber online presence and what are their plans related to this? 6. What are three promotion methods utilized by MARIO's Plumber? <p>Materials Handout 1 Page 7</p>	<ul style="list-style-type: none"> - What is the meaning of this word again? - How can I say "SPANISH WORD OR PHRASE" in English? - How do you spell that word? 		
5	<p>Post Task Using the information collected before, T will open the class for a small discussion around the following questions. Ss are required to improvise their answers and ask their own questions as well.</p> <ol style="list-style-type: none"> 1. Why would you choose Mario's Plumber products and services? 	<p>Useful language</p> <ul style="list-style-type: none"> - In my opinion.... - I believe... - I want to add something. - I would like to answer that question. - [Person] do you agree with me? 	L, S	15 min

	<p>2. <i>What do you like the most about this company?</i></p> <p>3. <i>How would you contact this company?</i></p> <p>4. <i>Do you think this company would be successful? Why or Why not?</i></p> <p>Materials: Handout 1 Page 8</p>	<p>- I am not sure, but what about if you ask me something else?</p>			
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Activity 1

Instructions: Do a Google search on marketing in order to answer the questions below. You will have 10 minutes to collect information. Then, you will share your answers with the rest of the class.

1. What is marketing?
2. What is a marketing mix?

Activity 2

1. Read the text “*The 4 P’s of Marketing Mix and how to master it in today’s world*”. Pay attention to the words and phrases that are underlined. If you do not know the pronunciation or the meaning of these words, use google.com or Cambridge’s online dictionary: <https://dictionary.cambridge.org/>
2. Read the text again and answer the questions below the text. You will discuss the answers in the main room. Some answers will not be found in the text, use your own knowledge and ideas to answer them.

Strategy Tip

When doing google searches for meaning, add some context to your search to find more accurate results.

Instead of looking for:

Google

bottom line meaning



Try looking for:

Google

bottom line meaning in business



The **4 P's of Marketing Mix** and how to master it in today's world

This article addresses how to use one of the oldest marketing concepts in today's online world:

"The Marketing Mix," which is based on the 4 P's: Product, Price, Place and Promotion.

The original concept of the 4 P's marketing mix



The essential base ingredients of the 4 P's are: **Product, Price, Place and Promotion**. While this combination doesn't appear to be rocket science, a company's ability or lack thereof to embrace and implement the 4 P's can make all the difference between thriving and failing as a business.

Each of the 4 P's build upon and interact with one another, and are governed by both internal and external factors within the business itself, and our ever-changing marketplace. The 4 P's of marketing primary purpose is to help us take into consideration potential roadblocks to widespread product adaptation and ongoing success.

4 P's of marketing in simple and familiar terms:



A **PRODUCT** is a service or good offered to meet consumer interest or demand. It could come in the form of occupational therapy or a fidget spinner - choices are only limited to the imagination, BUT, are highly dependent on marketplace curiosity or need.



PRICE is the cost people pay for a product. This includes base costs (materials, manufacturing, and shipping) plus expenses (rent, office supplies, healthcare, etc.). While you should always look to the competition, a smart business will tap into what people will actually pay for it. That's the only thing that counts. If you can't rise above your bottom line and make your target profit, then it's a losing proposition.



PLACE is the "home" where the product resides, and that "home" can live in many different channels, such as a physical store display, a newspaper, radio or TV ad, or

a website or blog spotlight. Really, a place is anywhere you can get your product in front of your target customers that compliments your budget, including the price point.



PROMOTION is product exposure and public relations efforts via advertising (through the channels mentioned above) as well as word of mouth, direct mail, email marketing and social media. Promotion is a communication tool that encapsulates the first 3 P's by putting the right product in the right place, at the right price, at the right time, with the goal of it being irresistible to customers.

Questions to answer:

1. What could happen if a company doesn't have a defined Marketing mix?
2. What is the primary purpose of a marketing mix?
3. Why is the product section important for the marketing mix?
4. Why is the price section important for the marketing mix?
5. Why is the place section important for the marketing mix?
6. Why is the promotion section important for the marketing mix?

Activity 3:

Instructions:

1. Read the text and identify words or phrases that you don't know the meaning or pronunciation of. Share your answer with your instructor in the main room.
2. Your instructor will collect all the relevant phrases and words, then you will be assigned a portion of these words and phrases for you

to investigate. You will need to teach the rest of the class what their meaning is and how to pronounce them if needed.

Context:

The Marketing Mix of “MARIO’S Plumber” reflects a real life example of how a service company covers the 4 P’s (Product, Price, Place, Promotion) in their marketing strategy.

“MARIO’S plumber” (a fictitious company) provides heating and cooling services in the Chicago Metropolitan Area.

MARIO’S Plumber marketing mix elements strategy

Product

MARIO’S Plumber offers industry standard services, but also innovates to provide more value to our customers and captures more of the market. We are insured, licensed and provide warranties for our work. Our high quality services and focus on a pleasant customer experience helps us get repeat clients, referrals, and builds our reputation. Also, our motto is: “Leave the place cleaner than we found it” - so you’ll always see us with a broom in our hands before we leave.

At present, the following are the main categories of MARIO’S Plumber products:

- Furnace installation and repair
- Water heater maintenance, installation and repair
- Air conditioning installation, maintenance and repair
- Complete plumbing system design and installation
- Drain, sink, and toilet unclogging and jet rodding and repairs

Price

Our reputation and successful marketing generates more demand than we can handle, so it allows us to charge premium for our services. We train our service technicians to upsell our other services. We also have a customer loyalty program in place to reward our long-term clients with better rates and provide coupons to first time clients. We also seek partnerships with organizations such as: homeowner associations, insurance companies, builders and general contractors, and offer exclusive pricing options based on quantity.

Place

The company has offices in downtown Chicago, but walk-in customers are unusual. We are physically represented by our company vans, uniforms and warranty stickers. We

consistently attend industry trade shows, and belong to the Chicago Chamber of Commerce.

We nurture partnerships with our equipment vendors, participate in their trainings, and have certifications, which allow us to be listed “licensed technicians” on their websites. We serve the Chicagoland Area, which is about a 30 mile radius from our warehouse, but we do make travel exceptions for long-term clients and bigger projects.

Our company website is the most important communication tool, and is a place where our clients learn about our services and make initial contact. We invest a great deal of money and time to keep it updated and useful to our audience. We plan to expand our website to include ecommerce and make some of the package services, equipment and accessories available for purchase online. None of our competitors are doing this at the moment, so we’ll take advantage of being pioneers in this regard.

Promotion

Most new business comes through our website and we focus all of our promotion efforts to drive more traffic to it. Our promotional mix is as follows:

- *Search engine optimization*
- *Paid traffic*
- *Social media marketing*
- *Content marketing*
- *Email marketing*

Activity 4 (Main Task):

Instructions:

1. Show your understanding of the main ideas of a marketing mix by answering the questions below. **Note:** Try to use your own words to answer instead of copying and pasting the answers from the text.

Questions to discuss

1. What are MARIO'S Plumber products?
2. What are some good qualities of this product (also called: competitive advantage)?
3. What are some pricing strategies implemented by MARIO'S Plumber?
4. Where are three ways in which MARIO'S Plumber can be found?
5. How important is MARIO'S Plumber online presence and what are their plans related to this?
6. What are three promotion methods utilized b MARIO's Plumber?

Activity 5

Instructions: Your instructor will initiate a conversation with the class about MARIOS' Plumber. Participate by answering their questions and of possible, ask your own questions and ideas.

Discussion questions:

1. Would you choose Mario's Plumber products and services? Why/why not?
2. What do you like the most about this company?
3. How would you contact this company?
4. Do you think this company would be successful? Why or Why not?



Unit Goal: By the end of this course, students will be able to successfully write a marketing mix section (product, price, place, and promotion) of a marketing proposal and present it during a marketing meeting with stakeholders.

General Objective: Write the product and price sections of a marketing mix by following business format standards and correct English grammar and vocabulary.

Specific Objectives: The students will be able to

1. clearly express their general thoughts about the quality of the price and product sections of a marketing mix;
2. effectively identify the different components of the product and price sections of a marketing mix;
3. show understanding of relevant product details that are included in the product and price sections of a marketing mix;
4. accurately write the product and price sections of a marketing mix for a given product;
5. effectively assess the product and price sections of a marketing mix by checking if they include the main components.

Objectives	Procedures	Language	Strategies	Macro Skills	Time
1	<p>Warm-up</p> <p>-In breakout rooms, Ss will share their opinions regarding the quality of a sample marketing mix studied during the previous class by answering the questions below:</p> <p><i>1-Do you think this is a well-written product section? Why/why not?</i></p> <p><i>2-In your opinion, is this section missing any relevant information?</i></p>	<p>Useful language</p> <ul style="list-style-type: none"> - In my opinion, this section is well written because... - I believe that... - I want to add that... - This section is/isn't well-written because... 		R, L, S	10 min

	<p>3-Do you think this is a well-written price section? Why/why not? 4-In your opinion, is this section missing any relevant information?</p> <p>Then, T will ask Ss to share their answers with the rest of the class in the main room.</p> <p>Materials Handout 1 Page 1</p>	<ul style="list-style-type: none"> - It is missing... - It includes information about... 		
2	<p>Pre-task 1</p> <ul style="list-style-type: none"> - In the main room, T will ask Ss to read a table with a list of the main concepts of the product and price sections of a marketing mix and their definitions. During this task, T will clarify doubts Ss may have about them. Then, Ss will read the product and price sections and match the concepts to the sentences in bold that exemplify them. <p>Materials Handout 1, Page 2 Handout 2, Page 1</p>	<p>Vocabulary</p> <p>Brand, warranty, packaging, bundling, retail price, pricing strategy, wholesale, cost-plus, value base, profit margin.</p> <p>Useful language</p> <ul style="list-style-type: none"> - Can you clarify the concept of...? - Can you give me an example of...? - This sentence is an example of... - I think this refers to... 	R, L, S	20 Min

3, 4	<p>Main task</p> <p>Part A: In breakout rooms, Ss will read information regarding a product that a company is planning to sell. Then, Ss will discuss the following questions:</p> <p>1-<i>What are the products included in Havic's bundle? What are some of their specifications?</i> 2-<i>Are the products warranted?</i> 3-<i>Is it better to sell the products separately or as a bundle?</i> 4-<i>What do you think would be an appropriate retail price for the bundle and for each individual item? What prices strategies do you think would be appropriate for this product?</i></p> <p>Then, T will ask Ss to share their answers in the main room.</p> <p>Materials Handout 1 Page 4</p> <p>Part B: - In the same groups, Ss will use the information in Part A and the models from the warm-up and pre-task 1 to write the product and price sections of a marketing</p>	<p>Useful language for Part A</p> <ul style="list-style-type: none"> - The products included in the bundle are... - The characteristics of the product are... - This item includes... - This product has/doesn't have a warranty. - It is better to sell this separately/as a bundle because... - An appropriate retail price for this is... - A good pricing strategy would be... <p>Useful Language for Part B</p> <ul style="list-style-type: none"> - How can I say...? - Is this idea clear? 	R, W, L, S	50 min
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	<p>mix. T will monitor their work during the task.</p> <p>Materials Handout 1 Page 6</p>	<ul style="list-style-type: none"> - How can we explain that...? - Do we need to include information about...? - I think we should mention... 		
5	<p>Post Task In breakout rooms, Ss will share their product and price sections and provide feedback by checking if they included information about the key concepts listed in the table of pre-task 1.</p> <p>Materials: Handout 1, Page 2</p>	<p>Useful language</p> <ul style="list-style-type: none"> - You need to include more details about... - I think you forgot to mention the... - It would be a good idea if you add information about... - I think it is not missing any relevant information 	R, L, S	10 min

Activity 1: MARIO's Plumber

Read the following information from the marketing mix studied last class. Then discuss the questions below.

Product

MARIO's Plumber offers industry-standard services but also innovates to provide more value to our customers and captures more of the market. We are insured, licensed, and provide warranties for our work. Our high-quality services and focus on a pleasant customer experience helps us get repeat clients, referrals, and builds our reputation. Also, our motto is: "Leave the place cleaner than we found it" - so you'll always see us with a broom in our hands before we leave.

At present, the following are the main categories of MARIO'S Plumber products:

- Furnace installation and repair
- Water heater maintenance, installation, and repair
- Air conditioning installation, maintenance, and repair
- Complete plumbing system design and installation
- Drain, sink, and toilet unclogging and jet rodding and repairs

- 1-Do you think this is a well-written product section? Why/why not?
2-In your opinion, is this section missing any relevant information?

Price

Our reputation and successful marketing generate more demand than we can handle, so it allows us to charge premium for our services. We train our service technicians to upsell our other services. We also have a customer loyalty program in place to reward our long-term clients with better rates and provide coupons to first-time clients. We also seek partnerships with organizations such as homeowner associations, insurance companies, builders, and general contractors, and offer exclusive pricing options based on quantity.

- 3-Do you think this is a well-written price section? Why/why not?
4-In your opinion, is this section missing any relevant information?

adapted from: <https://www.angle180.com/insights/4-ps-marketing-mix>

***Answers may vary for this activity**

Activity 2: Product and Price

Read these sample product and price sections. Match the concepts of the sections to the sentences in bold. Some components are not included in this marketing mix. Check handout 2 for the definition of some of these concepts.

Product:

1. Brand name
2. Related products or services
3. Partners
4. Functionality
5. Packaging
6. Quality
7. Warranty

Price:

- A. Bundling
- B. Pricing flexibility
- C. Retail price
- D. Seasonal price (if applicable)
- E. Wholesale (volume) price
- F. Cost plus
- G. Value base
- H. Profit margin

Product

Motorola () is a global leader in wireless and broadband communications technologies and related electronic products (). It has significant operations in the UK employing approximately 2,400 people.

Mobile phones are among the most familiar products to consumers and the mobile phone is seen by many as an essential item. It can perform a number of functions, including being:

- an essential means of communication
- a fashion statement
- a source of entertainment such as music and video games
- a safety precaution. ()

With a 4G phone, customers can browse special Internet sites, which means they can look at football scores, search cinema movie times, or live-chat with friends. **Motorola has partners such as MTV, with high-quality sites providing diverse and entertaining content ().** 4G phones offer much more effective access to music and video downloads because the networks they work on provide faster connections for downloading content than previous generations of phones.

In creating products, Motorola concentrates on:

- attractive design
- excellent call-quality
- ease of use
- value-added features including music player, games, camera, and video features
- high quality, reliable products. ()

Price

As with other companies, prices charged by Motorola are linked to the product life cycle. At Motorola, **when a new product is launched, prices typically are quite high. This happens due to the cost of production and the high investment in product and market research ().** It usually takes time for large numbers of consumers to purchase new products. As the product matures and sales increase, it is possible to reduce costs. With high outputs of production, costs of research and development, software engineering, and investment in plant (manufacturing machinery and tooling) can be spread. **The latest products are sold at premium prices reflecting the high quality of the items and their innovative nature ().**

Motorola also allows network providers such as Vodafone to sell phones at low prices via subscription services (). Network providers want as many people as possible to subscribe to their network. For this reason, they like to link with the producers of the best-designed phones which feature the most exciting and effective technologies. **Phone retailers will often supply free accessories with a mobile phone to make it more useful to phone users and to encourage them to buy ().**

Adapted from: <https://businesscasestudies.co.uk/creating-the-right-marketing-mix-2/>

Answers: Product: 1, 2, 4, 3, 6 **Price:** F, G, B, A

Activity 3 Part A: PVP and Havit Technology

Read the following information about PVP. Then, answer the questions on page 4. Pura Vida Products (PVP) is a retail company that focuses on offering a wide variety of tech products.

In order to target the emerging home-office trends, PVP is going to partner up with Havit Technology co. in an exclusive sales and marketing agreement.

Havit specializes in manufacturing technological products such as headsets, speakers, keyboards, mice, smartwatches, and webcams.

One of the products that PVP will focus on offering is Havit's KB501CM Combo.

Here are the bundle's specifications:

Mouse

1. Four gears of mouse adjustment (800-1200-1600-2400 DPI)
2. Cool RGB lights
3. Ergonomic design, with anti-slipping surface, it fits perfectly to palms and without fatigue in long-time using.

Keyboard

1. Eye-catching gaming design
2. 19 anti-ghosting keys, enable free control
3. FN multimedia keys
4. 10 standard multimedia keys.

Headphone

1. Cool appearance, simple and elegant.
2. High magnetic 40mm speaker, with strong sounding quality
3. The retractable design of the headband fits the different sizes of the head shapes


Mousepad

1. Premium fine-mesh cloth surface, allowing your mouse to move smoothly and accurately.
2. Anti-slip rubber base effectively keeps the mouse pad from slipping.
3. Edge covering design makes it serves much longer.

Additional information:

- All products have a one-year warranty.
- Each product can be sold separately due to its individual packaging.
- As part of the agreement, PVP will place a yearly order for 2000 units at a cost of \$9.90 per unit. Including taxes and shipping, the final cost of each unit will be \$16.

Extra information about the bundle:




GAMING MOUSE&KEYBOARD& HEADPHONE&MOUSE PAD

Four gears of mouse adjustment(800-1200-1600-2400DPI), enables freely switching in game.

With Fn multimedia keys, you can carry out quick operations on music play, volume control and Internet browsing to save your time.

Cool appearance, simple and elegant.

Premium fine-mesh cloth surface, allowing your mouse move smoothly and accurately.



KB501CM

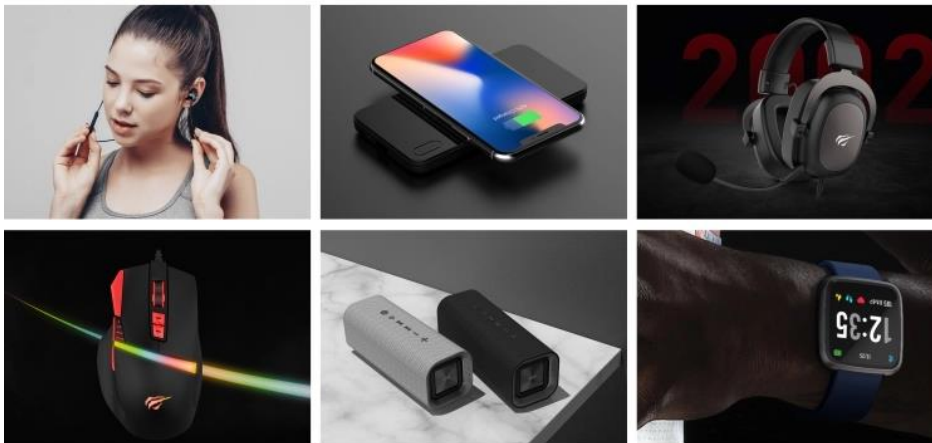
Mouse:
Size: 117*64*38.6mm
Key number: 6
Resolution: 800-1200-1600-2400DPI
Operating Voltage: 5V
Key life: 3,000,000times
Cable length: 1500mm

Keyboard:
Interface Type: USB
Size: 493*202*40mm
key number: 114
Operating Voltage: 5V
Key Life: 5,000,000 times
Cable Length: 1500mm

Headphone:
Speaker: 40mm
Impedance: 32±10%Ω
Sensitivity: 108dB±3 dB
Frequency Response: 20 hz to 20khz
Cord Length: 1.8m
Plug: 3.5 mm

Mouse pad:
Type: Mouse Pad
Physical Dimensions: 250*210*2mm
Material: Fine Mesh Cloth

MORE PRODUCTS



Adapted from: <https://www.havit.hk/products/kb501cm-4ni1-gaming-combo/>

1. What are the products included in Havit's bundle? What are some of their specifications? **(Answers are included in the table above)**
2. Are the products warranted? **(Yes, there is a one-year warranty)**
3. Is it better to sell the products separately or as a bundle? **(Answers may vary)**
4. What do you think would be an appropriate retail price for the bundle and for each individual item? What prices strategies do you think would be appropriate for this product? **(Answers may vary)**

Activity 3 Part B: Writing your marketing mix

You have been assigned to the team that is working on a new marketing strategy for PVP. Your task is to write the product and price sections of the marketing mix. Use the information in activity 3 part A and the samples in activities 1 and 2 to write them.

Product: (Remember to include information about brand name, related products, partners, functionality, quality, warranty.)

Price: (Remember to include information regarding the decisions justifying the retail price of the product. If applicable, refer to bundling, pricing flexibility, pricing strategy, seasonal price, wholesale, value base, cost plus.)

Handout 2

Marketing Mix

Product Section

1. **Brand name:** the name given to a particular product by the company that makes it.
2. **Packaging:** The materials in which objects are wrapped before being sold.
3. **Warranty:** A written promise from a company to repair or replace a product that develops a fault within a particular period of time.

Price Section

- A. **Bundling:** You put in similar or dissimilar products together and sell them

at a discounted price

- B. Pricing flexibility:** Allowing the reseller or the salesperson to modify the price according to an agreed range.
- C. Retail price:** the price that customers pay for goods in stores
- D. Seasonal price:** Prices that vary according to specific seasons.
- E. Wholesale price:** The price paid for large quantities of products, often from a wholesaler. Often purchased by businesses that will sell them on to the public at a higher retail price.
- F. Cost-plus:** Cost Plus is taking the production cost and adding a certain profit percentage. The resulting amount will be the product's price.
- G. Value base:** Instead of using the production cost as your basis, you consider the customer's perception of the product's value. The perception of the buyer is dependent on the product's quality, the company's reputation, and healthfulness, aside from the cost factors.
- H. Profit margin:** The difference between the total cost of making and selling something and the price it is sold for

Definitions adapted from <https://dictionary.cambridge.org/>



Unit Goal: By the end of this course, students will be able to successfully write a marketing mix section (product, price, place, and promotion) of a marketing proposal and present it during a marketing meeting with stakeholders.

General Objective: Write the promotion and place sections of a marketing mix by following business format standards and correct English grammar and vocabulary.

Specific Objectives: The students will be able to

1. orally express general, clear thoughts about the promotion and place sections of a marketing mix;
2. effectively identify, in a written sample, the different components of the promotion and place sections of a marketing mix by completing a chart;
3. determine the appropriate information to be included in the promotion and place sections of a marketing mix by orally discussing the questions about a product;
4. accurately write the promotion and place sections of a marketing mix for a given product;
5. effectively provide peer-feedback about the promotion and place of a marketing mix by completing a peer-feedback form.

Objectives	Procedures	Language	Strategies	Macro Skills	Time
1	Warm-up - In breakout rooms, Ss will discuss the following questions to review the information that the promotion and place sections should include. 1. What information should the promotion section of a marketing mix include?	Useful language - I think the <i>promotion</i> section should include <i>advantages</i> . - In my opinion, this section should		R, L, S	10 min

	<p>2. What information should the place section of a marketing mix include?</p> <p>Materials Handout 1 p. 1 Power point presentation slides 2 and 3. Handout 2.</p>	<p>include <i>information about the place</i>.</p> <ul style="list-style-type: none"> - I'm not sure about what it includes. 			
2	<p>Pre-task 1 - In breakout rooms, Ss will read a sample of a promotion and a place sections from a marketing mix and complete each chart by writing the corresponding sentences taken from the sample.</p> <p>Materials Handout 1 p.1,2 Power point presentation slide 4, 5 and 6.</p>	<p>Useful language</p> <ul style="list-style-type: none"> - Do you think this is the <i>advertising strategy</i>? - Would you like to read the following section? 		W, R, L, S	20 Min
3	<p>Pre-task 2 - In breakout rooms, Ss will discuss and answer questions related to place and promotion of a marketing mix about their product.</p> <p>Promotion</p> <ol style="list-style-type: none"> 1. What will the advantages of your product be? 2. What advertising strategies will you use? 	<p>Useful language</p> <ul style="list-style-type: none"> - I think one of the advantages of this product is that <i>it's cheap</i>. - We should choose a <i>virtual place</i> to sell our product. - I prefer to use <i>social media</i> as an 		L, S	25 Min

	<p>Place</p> <ol style="list-style-type: none"> Where will customers find your products? What will the advantages of these places be? <p>Materials Handout 1.3 Power point presentation slide 6</p>	advertising strategy.			
4	<p>Main task</p> <ul style="list-style-type: none"> In breakout rooms, Ss will write the promotion and place sections of a marketing mix. They will Use the information from Activity 3 to write them. <p>Materials Handout 1 p. 4 Power point presentation slide 7</p>	<p>Useful language</p> <ul style="list-style-type: none"> How should we start? What should we include here? I think we can include a social media advertising strategy. 	R, W, L, S	35 min	
5	<p>Post Task</p> <ul style="list-style-type: none"> Ss will exchange their promotion and place sections to provide peer-feedback. <p>Materials: Handout 1 p.5 Power point presentation slide 8</p>	<p>Useful language</p> <ul style="list-style-type: none"> Do you agree with this <i>statement</i>? I agree. I don't agree. Do you want to add an additional comment? 	R, W, L, S	15 min	

Handout 1

Activity 1

In pairs, discuss the questions below.

1. What information should the promotion section of a marketing mix include?
 2. What information should the place section of a marketing mix include?
- Remember you can use *The original concept of the 4 P* document to find the requested information.

Activity 2

Read the samples of a promotion and a place sections from a marketing mix and complete each chart by writing evidence taken from the text.

Promotion

Relevant sections	Sample sentences from the text
<p>Advantages: Information to persuade customers to buy your product.</p>	
<p>Advertising: This is how you promote your product. It is usually paid, with little or no personal message. Social media is most often the carrier of these messages.</p>	

Customers love our services because our deliveries are fast, and as our motto says, “we leave the place cleaner than we found it”. Mario’s Plumbing will promote its services in two ways. First, we will utilize paid advertising campaigns through social media. This will help us reach a great number of potential customers. We will focus on mobile ads. Second, we

will implement a sales strategy in the short term. We will offer special deals to new customers. This will increase the chance to have repeated consumers.

Place

The company will have offices in downtown Chicago. We will be physically represented by our company vans, uniforms, and warranty stickers. This is a great way to communicate, since several of our customers will use the information presented there to contact us. Our company website is the most important communication tool. This is an excellent method since it is a place where our clients learn about our services and make initial contact. We invest a great deal of money and time to keep it updated and useful to our audience.

Relevant sections	Sample sentences from the text
<p>Location: The different ways in which they will be found: Offices, supermarkets, online retailers, their own website, posters and banners.</p>	
<p>Advantages: Reasons why using these locations make sense from a strategic standpoint.</p>	

Activity 3

You are about to make decisions about the place and promotion of your marketing strategy. Discuss with your team the following questions.

GAMENOTE

**GAMING MOUSE&KEYBOARD&
HEADPHONE&MOUSE PAD**

Four gears of mouse adjustment(800-1200-1600-2400DPI), enables freely switching in game.

With Fn multimedia keys, you can carry out quick operations on music play, volume control and internet browsing to save your time.

Cool appearance, simple and elegant.

Premium fine-mesh cloth surface, allowing your mouse move smoothly and accurately.

KB501CM



<p>Mouse: Size: 117*64*38.6mm Key number: 6 Resolution: 800-1200-1600-2400DPI Operating Voltage: 5V Key life: 3,000,000times Cable length: 1500mm</p>	<p>Keyboard: Interface Type: USB Size: 493*202*40mm key number: 114 Operating Voltage: 5V Key Life: 5,000,000 times Cable Length: 1500mm</p>	<p>Headphone: Speaker: 40mm Impedance: 32±10%Ω Sensitivity: 108dB±3 dB Frequency Response: 20 hz to 20khz Cord Length: 1.8m Plug: 3.5 mm</p>	<p>Mouse pad: Type: Mouse Pad Physical Dimensions: 250*210*2mm Material: Fine Mesh Cloth</p>
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Remember you can use information from the product detail page.

<https://www.havit.hk/products/kb501cm-4ni1-gaming-combo/>

Promotion

1. What will the advantages of your product be?
2. What advertising strategies will you use?

Place

1. Where will customers find your products?
2. What will the advantages of these places be?

You can find more information about place and promotions strategies in the links below.

- **Promotion** <https://www.business2community.com/content-marketing/7-types-ad-strategies-every-copywriter-know-01057899>
- **Place** <https://marketingmix.co.uk/place/>

Activity 4

It is time for you to continue writing your marketing mix for the product that PVP will release soon. Write the promotion and place sections using the information from activity 3.

Promotion
Place

Activity 5

You have been asked to assess the place and promotion sections of a marketing mix. Use the form below to provide feedback to your peers.

Group:

Peer-feedback form		
Statements and questions	Yes / No	Comments
It states the advantages of the product.		
It includes advertising strategies.		
It clearly mentions the place.		
It states the advantages of the place.		
Would you change something?		

Handout 2

The original concept of the 4 P's marketing mix



The essential base ingredients of the 4 P's are: **Product, Price, Place** and **Promotion**. While this combination doesn't appear to be rocket science, a company's ability or lack thereof to embrace and implement the 4 P's can make all the difference between thriving and failing as a business.

Each of the 4 P's build upon and interact with one another, and are governed by both internal and external factors within the business itself, and our ever-changing marketplace. The 4 P's of marketing primary purpose is to help us take into consideration potential roadblocks to widespread product adaptation and ongoing success.

4 P's of marketing in simple and familiar terms:



A **PRODUCT** is a service or good offered to meet consumer interest or demand. It could come in the form of occupational therapy or a fidget spinner - choices are only limited to the imagination, BUT, are highly dependent on marketplace curiosity or need.



PRICE is the cost people pay for a product. This includes base costs (materials, manufacturing, and shipping) plus expenses (rent, office supplies, healthcare, etc.). While you should always look to the competition, a smart business will tap into what people will actually pay for it. That's the only thing that counts. If you can't rise above your bottom line and make your target profit, then it's a losing proposition.



PLACE is the “home” where the product resides, and that “home” can live in many different channels, such as a physical store display, a newspaper, radio or TV ad, or a website or blog spotlight. Really, a place is anywhere you can get your product in front of your target customers that compliments your budget, including the price point. It is very important to mention in this section the advantages behind these places.



PROMOTION is product exposure and public relations efforts via advertising (through the channels mentioned above) as well as other means such as word of mouth, direct mail, email marketing and social media. The promotion section is an excellent place to communicate the advantages of your product that will make customers buy it.

Adapted from: <https://www.angle180.com/insights/4-ps-marketing-mix>

Class 12

Marketing mix

Activity 1

In pairs, discuss the questions below.

1. What information should the promotion section of a marketing mix include?
2. What information should the place section of a marketing mix include?

Useful language

- I think the *promotion* section should include *advantages*.
- In my opinion, this section should include *information about the place*.
- I'm not sure about what it includes.

Activity 1

In pairs, discuss the questions below.

1. What information should the promotion section of a marketing mix include?

- *Information to persuade customers to buy your product (Advantages)*
- *The ways in which you can use to communicate with the target audience*

2. What information should the place section of a marketing mix include?

- *The different ways in which the product will be found: Offices, supermarkets, online retailers, their own website, posters and banners.*
- *The advantages of the selected locations.*

Activity 2

Read the samples of a promotion and a place sections from a marketing mix and complete each chart by writing evidence taken from the text.

Useful language

- Do you think this is the *advertising strategy*?
- Would you like to read the following section?

Activity 2

Promotion	
Relevant sections	Evidence
<p>Advantages: Information to persuade customers to buy your product.</p>	<p>Customers love our services because our deliveries are fast, and as our motto says, "we leave the place cleaner than we found it"</p>
<p>Advertising: This is how you promote your product. It is usually paid, with little or no personal message. Social media is most often the carrier of these messages.</p>	<p>First, we will utilize paid advertising campaigns through social media. This will help us reach a great number of potential customers. We will focus on mobile ads. Second, we will implement a sales strategy in the short term. We will offer special deals to new customers.</p>

Activity 2

Place	
Relevant sections	Evidence
<p>Location: The different ways in which they will be found: Offices, supermarkets, online retailers, their own website, posters and banners.</p>	<p>The company will have offices in downtown Chicago.</p> <p>Our company website is the most important communication tool.</p>
<p>Advantages: Reasons why using these locations make sense from a strategic standpoint.</p>	<p>This is an excellent method since it is a place where our clients learn about our services and make initial contact. We invest a great deal of money and time to keep it updated and useful to our audience.</p>

Activity 3

You are about to make decisions about the place and promotion of your marketing strategy. Discuss with your team the following questions.

Promotion

1. What will the advantages of your product be?
2. What advertising strategies will you use?

Place

1. Where will customers find your products?
2. What will the advantages of these places be?

Useful language

- I think one of the advantages of this product is that *it's cheap*.
- We should choose *a virtual* place to sell our product.
- I prefer to use *social media* as an advertising strategy.

Activity 4

It is time for you to continue writing your marketing mix for the product that PVP will release soon. Write the promotion and place sections using the information from activity 3.



Useful language

- How should we start?
- What should we include here?
- I think we can include *a social media advertising strategy*.

Activity 5

Use the **Peer-feedback form** to provide feedback to your peers.

Useful language

- Do you agree with this *statement*?
- I agree.
- I don't agree.
- Do you want to add an additional comment?





Unit Goal: By the end of this course, students will be able to successfully write a marketing mix section (product, price, place, and promotion) of a marketing proposal and present it during a marketing meeting with stakeholders.

General Objective: Successfully prepare for marketing mix presentation for stakeholders by identifying effective public speaking strategies and preparing a visual aids using correct English grammar and vocabulary.

Specific Objectives: The students will be able to

1. appropriately pronounce words related to marketing;
2. correctly answer possible stakeholders questions about a marketing mix;
3. accurately identify effective public speaking strategies from a video;
4. design a presentation of a marketing mix based on a previously written report;
5. rehearse a marketing mix presentation before presenting it in a meeting with stakeholders.

Objectives	Procedures	Language	Strategies	Macro Skills	Time
1	<p>Warm-up</p> <ul style="list-style-type: none"> -T will show <i>Ss Handout 1: Warm Up</i> with words they mispronounced during the previous lesson. -One by one, Ss will be asked to pronounce the words correctly. -T will correct Ss' pronunciation if necessary. <p>Materials</p>	<p>Useful language</p> <ul style="list-style-type: none"> - The correct pronunciation of that words is <i>advantages</i>. - I don't know how to pronounce that word. 		L, S	15 min

	Handout 1: Warm Up	- What's the meaning of that word?			
2	<p>Pre-Task 1</p> <ul style="list-style-type: none"> - In breakout rooms, Ss will read <i>Handout 2: Marketing Mix Report</i> and decide as a group if they want to make any general modifications. Additionally, Ss will have to read the possible stakeholders questions and answer them as a group. Ss have to decide who will answer each question when the stakeholders ask them. <p>Materials</p> <p>Handout 2: Marketing Mix Report (Group 1 and Group 2)</p>	<p>Useful Language</p> <p><u>To modify the Marketing Mix Report</u></p> <ul style="list-style-type: none"> - I want to suggest a change in the <i>Product</i> section. - I think this section is ready. - I agree we should change that. - I disagree. I think it is fine the way it is. <p><u>To answer the Q&A</u></p> <ul style="list-style-type: none"> - I think we should say that.... - I would like to answer that question. - I think you should answer this question. 	R, W, S, L	20 min	
3	<p>Pre-task 2</p> <ul style="list-style-type: none"> - T will explain the meaning of specific words Ss will hear in a video about public speaking strategies. Then, individually, Ss will watch a video and identify 3 useful 	<p>Useful language</p> <ul style="list-style-type: none"> - The video mentions that it is a good idea to be <i>organized and concise</i>. 	R, S, L	25 Min + 5min break	

	<p>tips for public speaking. Then, T will ask Ss to share their answers. Once finished, T will provide a <i>Handout 3: Public Speaking Strategies</i> with the summary of the tips.</p> <p>Materials Handout 3: Preparing for Public Speaking Video https://www.youtube.com/watch?v=i5mYp_hUoOCs</p>	<p>- The video mentions that it is important to <i>make eye contact with the audience</i>.</p> <p>Vocabulary:</p> <ul style="list-style-type: none"> • Ramble • Long-winded • Clutter • Fidget • Fillers 			
4	<p>Main Task</p> <ul style="list-style-type: none"> - T will provide <i>Handout 4: Presentation Template</i> to organize the Marketing Mix presentation. - In breakout rooms, Ss will prepare the presentation of the marketing mix based on the reports they previously wrote. Ss will also decide who will present which section. <p>Materials Handout 4: Presentation Template</p>	<p>Useful language</p> <ul style="list-style-type: none"> - What should we write on this slide? - I can present the <i>first two slides</i>. - Do you want to <i>start</i> the presentation? - What type of information should we include in this section? - What phrases can we use to introduce this section? - I think we should add this information. 	R, L, S, W	40 min	
5	<p>Post Task</p> <ul style="list-style-type: none"> - Ss will practice some public speaking skills by presenting small sections and 	<p>Useful language</p> <ul style="list-style-type: none"> - Group number 1 mentioned all the 	L, S	15 min	

	<p>phrases of their presentation. T will use the following prompts to have Ss practice:</p> <ol style="list-style-type: none"> 1. Give us your opening phrase while making eye contact. 2. Tell us your product section using confident posture and gestures. 3. Tell us your price section using confident, clear voice and pauses. <p>Materials: Handout 5: Practice Your Presentation</p>	<p>requested information.</p> <ul style="list-style-type: none"> - They described all the findings in detail. 			
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Handout 1

WARM UP!

LET'S PRACTICE HOW TO PRONOUNCE THE
FOLLOWING WORDS!

CUSTOMERS



BUNDLE



BOUGHT

- bought. Comprado
- sought. Buscado
- ought. Deber hacer.
- thought. nada

THROUGH

- plough. arado
- cough. tos
- rough. aspero
- thorough. completo

OF vs OFF



Handout 2

Marketing Mix Group 1

Product

PVP has an agreement with Havit company to sell their products and will be focused on KB501CM Combo that includes mouse, keyboard, headphone and mousepad. These products have certain specifications that include ergonomic design, eye-catching gaming design, a retractable design of the headband fits the different sizes of the head shapes and anti-slip rubber base, respectively. All these products have a one-year warranty.

Price

Due to the production cost of \$9.90 and \$16 including taxes and shipping for the bundle, an appropriate list price would be \$40. It is the right price in order to target the emerging home-office and gaming trends. Because of the customer's profile, the company bets on a value base strategy. Black Friday is coming soon, so the company wants to include an offer in the price. For that day, the price for the bundle will be \$29.99 according to the seasonal price strategy. Additionally, the company has a partnership with a delivery company, which will allow us to deliver the products to the customers for free on Black Friday.

Promotion

Customers will love our products because they are useful. The products can be used to work from home, study or gaming. The products come in a bundle so it's easier for customers to buy it. The bundle can be bought by customers of all ages. The website offers a complete description of the products. The main advertising strategy will be social media, because nowadays it's one of the most important channels to communication. We will use Facebook and Instagram.

Place

Customers can find our products in 2 different ways. First, they can find our products in a physical store such as: technology stores or retail stores, the advantage of this is that the customer can check the product and also can buy it immediately.

Second, they can buy the bundle online through our website, the advantage of this is that the customer can buy it easily with just one click, they can buy it from their home and then just wait for the delivery.

Possible stakeholder questions:

1. Will be it possible for customers to buy the product without the one year warranty for a for a cheaper price? Why and why not?
2. We see that there will be an offer for black Friday, do you plan to have offers for other holidays? Which holidays and why?
3. Why did you decide to use Facebook and Instagram for advertising?
4. You mentioned you will use your own website to sell your products, are there any plans to sell your products through other websites such as Amazon, Mercado Libre, Ebay? Why or why not?

Marketing Mix Group 2

Product

Pura Vida Products (PVP) is a retail company that focuses on offering a wide variety of tech products. We offer products and technology items such as Mouse, keyboards, headphones and mousepads. In order to target the emerging home-office trends and the gamer consumers, PVP is going to partner up with Havit Technology in an exclusive sales and marketing agreement. They provide items for pc gaming and office equipment. PVP will focus on offering Havic's KB501CM Combo that includes headphone, mouse, mousepad and keyboard. All products have a one-year warranty. Each product can be sold separately due to its individual packaging.

Price

As with other companies, prices charged by PVP are linked to the product life cycle. At PVP, when a new product is launched, prices typically are quite high. This happens due to the cost of production and the high investment in product and market research. It usually takes time for large numbers of consumers to purchase new products. As the product matures and sales increase, it is possible to reduce costs. The latest products are sold at premium prices reflecting the high quality of the items and their innovative nature.

Promotion

To make it easier for our clients we are going to show them ads in online games that they usually play and in social media. Our product has an ergonomic design and it is cool and elegant. As a bundle, our product has the cheapest price in the market, if the client finds some similar bundle cheaper than our product, we will return the difference. We will offer special discounts to new customers on our website.

Place

The company will not have physical offices, but the clients can find our products in stores such as: Office Depot, Universal, Monge, Gollo, Miguelito's Store. Additionally, we are in negotiations with Kolbi, Claro and Movistar to offer the bundle with the internet

services. Our company website is the most important communication tool because our target market “lives” on the internet, which makes it easier to find our product.

Possible stakeholder questions:

1. Will be it possible for customers to buy the product without the one year warranty for a for a cheaper price? Why and why not?
2. Do you have any plans to lower the price at strategic times of the year? Why or Why not?
3. If a customer finds a cheaper price, will you return the money in cash or as a credit for their next purchase? Please explain why.
4. Why did you decide not to have your own physical store?

Handout 3.1



CHOOSE THE BEST DEFINITION**RAMBLE**

TALK OR WRITE AT LENGTH IN A CONFUSED OR INCONSEQUENTIAL WAY.

TALK OR WRITE CLEARLY AND CONCISELY

CHOOSE THE BEST DEFINITION**LONG-WINDED**

(OF SPEECH OR WRITING) CONTINUING AT LENGTH AND IN A TEDIOUS WAY.

(OF SPEECH OR WRITING) CONTINUING AT LENGTH AND IN A PLEASANT WAY.

CHOOSE THE BEST DEFINITION

CLUTTER - UP

FILL A SPACE IN A
DISORDERLY WAY

FILL A SPACE IN AN
ORGANIZED WAY

CHOOSE THE BEST DEFINITION

FIDGET

TO MOVE ABOUT
CALMLY, PATIENTLY.

TO MOVE ABOUT
RESTLESSLY,
NERVOUSLY, OR
IMPATIENTLY.

CHOOSE THE BEST DEFINITION

FILLERS

A PERSON OR THING THAT FILLS A SPACE OR CONTAINER.

A PERSON OR THING THAT LIBERATES SPACE.

LET'S WATCH THE VIDEO

- Instructions:
- Identify at least 3 useful tips for public speaking!
- Be ready to share with the class.
- <https://www.youtube.com/watch?v=i5mYphUoOCs>

Handout 3.2

Public Speaking Strategies

Be organized and concise.

Have an introduction, clear main points, transition statements between each point, and a concluding sentence.

Make eye contact.

One thought, one look. Look at a person's eyes to finish a thought. In virtual environments, look directly at the camera.

Simplify your notes

Try to have a conversational style. Use your natural personality. Use clear simple slides.

Don't use a lot of images or colors in your slide.

Confident posture and gestures.

Confident posture, use hand gestures to emphasize your ideas.

Confident, clear voice with pauses.

In virtual environments, make sure you make enough pauses for others to catch the idea even if there is bad internet connection.

Handout 4

Marketing Mix

Group # [WRITE YOUR GROUP NUMBER]

Presenters: [WRITE PARTICIPANTES NAMES]

Introduction

- Explain the purpose of the presentation (Purpose: You want to get approval from stakeholders to implement your marketing strategy).
- Mention the titles of the sections that you are going to present.

Product

Price

Promotion

Place

Conclusion and Q&As

- Rephrase the purpose of the presentation
- Ask the audience for questions

PRACTICE YOUR PRESENTATION

LET'S LEARN SOME NEW VOCABULARY
BEFORE THE VIDEO

**1. GIVE US YOUR OPENING PHRASE WHILE
MAKING EYE CONTACT.**

**2. TELL US YOUR PRODUCT SECTION
USING CONFIDENT POSTURE AND
GESTURES.**

**3. TELL US YOUR PRICE SECTION USING
CONFIDENT, CLEAR VOICE AND PAUSES.**

University of Costa Rica
 Master's Program in TEFL
 English for Business Administration
 Arguedas, Cervantes, Gómez

Date: Nov 11th Lesson Plan # 15

Student teacher: Lidia Gomez, Luis Cervantes,
 Andrick Arguedas

Unit # 3: Presenting your Marketing Strategy



Unit Goal: By the end of this course, students will be able to successfully write a marketing mix section (product, price, place, and promotion) of a marketing proposal and present it during a marketing meeting with stakeholders.

General Objective: Successfully present a marketing mix to stakeholder by using effective public speaking strategies and appropriate English grammar and vocabulary.

Specific Objectives: The students will be able to

1. appropriately utter useful language chunks relevant for a marketing mix presentation;
2. prepare for a marketing mix presentation by completing a readiness checklist;
3. formally present a marketing mix to stakeholders in a meeting;
4. self-assess their marketing mix presentation by answering a set of questions.

Objectives	Procedures	Language	Strategies	Macro Skills	Time
1	<p>Warm-up</p> <ul style="list-style-type: none"> - T will show a presentation with language chunks for a business presentation. T will model the intonation, clarity and pace of these chunks. Ss will repeat them. <p>Materials PPT Handout 2.</p> <p>Pre-Task 1</p>	<p>Useful language</p> <ul style="list-style-type: none"> - Can you repeat it one more time. - What is the meaning of this phrase? - How do you pronounce...? 		L, S, R	10min.
2		Useful Language		R, W, S, L	30min.

	<ul style="list-style-type: none"> - In breakout rooms, Ss will prepare their marketing mix presentations. They will use a checklist in Handout 1 to make sure that they covered all the important aspects. - <p>Materials Handout 1, page 1.</p>	<ul style="list-style-type: none"> - Do we have transitional phrases for all the sections? - Can we practice this part? - I feel ready/I don't feel ready yet. - How do you pronounce this word? 		
3	<p>Main task</p> <ul style="list-style-type: none"> - Ss will present their marketing mix group by group. Ss that are not presenting will assess the presenter by using the checklist in handout 1. T will provide general comments and feedback after each presentation. <p>Materials Handout 1, page 2.</p>	<p>Useful language</p> <ul style="list-style-type: none"> • Should we start now? • Do you have any questions? • Does that make sense? • Would you like me to repeat that? 	R, S, L.	50min.
4	<p>Post Task</p> <ul style="list-style-type: none"> - In breakout rooms, Ss will self-reflect on their presentations by using guiding questions. Ss will share what they discussed in the main room. <p>Materials Handout 1, page 2.</p>	<p>Useful language</p> <ul style="list-style-type: none"> - We talked about.... - We believe we could have.... - We all agree that... - We think that... 	L, S	10min

Handout 1

Activity 1

Instructions:

Let's read phrases and expressions to use in a business presentation. Practice intonation, clarity and pace.

Opening sentences

- Good evening everyone. Today, we are here to present our marketing mix.
- Hello everybody. Thank you for joining today. As you may know, the purpose of this meeting is to get your approval for our marketing plan.

Transition phrases

- Now, let's move to the first part of our proposal, the product section.
- Moving on to the next section, we will discuss our pricing strategies. First, we are planning to set the price at \$40 for the bundle.
- Now, I want to give the floor to Luis. He will discuss our advertising strategies in detail. Luis, go ahead.
- Next, we have Andrick, who will tell us about the place and promotion sections. Andrick, you may continue.

Concluding

- Thank you for staying with us during this presentation, I would like to end with a summary of the main points.
- Thank you so much for your attention; I will be more than glad to answer any of your questions.

Activity 2

Instructions:

Use the checklist below to confirm you are ready for your presentation.

Aspect	Check
*Make sure to use appropriate transitional phrases between presenters and sections.	
*Check that slides are be simple and clear.	
*Make sure the presentation contains all the required sections (introduction, product, place, price, promotion, and conclusion)	
*Make sure that you know how to pronounce every word in the presentation. Ask for help if you need clarification.	
*Be ready to answer any questions from the stakeholders. All presenters must answer at least one question.	
*Do not read directly from the presentation	

Main Task

Instructions:

1. Present your marketing mix to the stakeholders.
2. If you are not presenting, complete the following assessment for your peers. You should evaluate the presentation in general and not per person.

Aspect to evaluate	Yes	No
Presenters used clear voice with appropriate pauses.		
The presentation was organized and concise.		
Presenters made appropriate eye contact with the camera.		
The presentation used clear simple slides.		
Presenters had confident postures and gestures.		

Post Task

Instructions:

- ◆ In breakout rooms, discuss the following questions with your group.
 - ◆ Prepare to share your thoughts with the group.
1. What are three areas of opportunity that you consider you had during your presentation?
 2. What are three strengths of your presentation?

Handout 2

Class 15

Activity 1

- ◆ Let's read the following phrases and expressions used in a business presentation.
- ◆ We will practice intonation, clarity and pace.
- ◆ Your teachers will read it once, and you will be asked to repeat.

Activity 1 - Opening sentences

- ◇ Good evening everyone. Today, we are here to present our marketing mix.
- ◇ Hello everybody. Thank you for joining today. As you may know, the purpose of this meeting is to get your approval for our marketing plan.

Activity 1 - Transition phrases

- ◇ Now, let's move to the first part of our proposal, the product section.
- ◇ Moving on to the next section, we will discuss our pricing strategies. First, we are planning to set the price at \$40 for the bundle.
- ◇ Now, I want to give the floor to Luis. He will discuss our advertising strategies in detail. Luis, go ahead.
- ◇ Next, we have Andrick, who will tell us about the place and promotion sections. Andrick, you may continue.

Activity 1 - Concluding

- ◇ Thank you for staying with us during this presentation, I would like to end with a summary of the main points.

- ◇ Thank you so much for your attention; I will be more than glad to answer any of your questions.

Activity 2

- ◇ Check you are ready to present and to give peer-feedback. Use the following check list as a job aid.

Aspect	Check
*Make sure to use appropriate transitional phrases between presenters and sections.	
*Check that slides are be simple and clear.	
*Make sure the presentation contains all the required sections (introduction, product, place, price, promotion, and conclusion)	
*Make sure that you know how to pronounce every word in the presentation. Ask for help if you need clarification.	
*Be ready to answer any questions from the stakeholders. All presenters must answer at least one question.	
*Do not read directly from the presentation	

Main Task

- ◆ Present your marketing mix to the stakeholders.
- ◆ If you are not presenting, complete the following assessment for your peers. You should evaluate the presentation in general and not per person.

Aspect to evaluate	Yes	No
Presenters used clear voice with appropriate pauses.		
Presenters had confident postures and gestures.		
Presenters made appropriate eye contact with the camera.		
The presentation was organized and concise.		
The presentation used clear simple slides.		

Post Task

- ◆ In breakout rooms, discuss the following questions with your group.
 - ◆ Prepare to share your thoughts with the group.
1. What are three areas of opportunity that you consider you had during your presentation?
 2. What are three strengths of your presentation?