



## PERFORMANCE INDICATORS

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### BUSINESS MANAGEMENT + ADMINISTRATION CAREER CLUSTER

THE BUSINESS MANAGEMENT + ADMINISTRATION CAREER CLUSTER PERFORMANCE INDICATORS ARE USED FOR THE FOLLOWING EVENTS:

BUSINESS LAW AND ETHICS TEAM DECISION MAKING **BLTDM**

HUMAN RESOURCES MANAGEMENT SERIES **HRM**  
*Human Resources Management Pathway*

Performance indicators are used to define the parameters of the comprehensive written career cluster exam and other activities that are part of the overall competition.

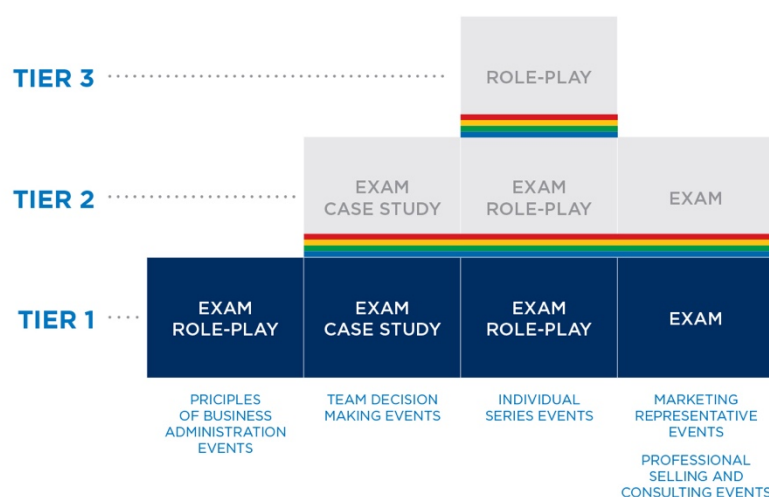
This list was compiled by MBAResearch and Curriculum Center and DECA Inc. and represents efforts to support all DECA competitive events within the overall framework of the National Business Administration Standards. Individual indicators are based on a review of prior research and on extensive review of available online and print literature—both from industry and education.

For additional information on these Performance Indicators, the National Curriculum Framework, or the National Business Administration Standards, please visit the MBAResearch web site at [www.MBAResearch.org](http://www.MBAResearch.org). Questions may be e-mailed to [betho@MBAResearch.org](mailto:betho@MBAResearch.org).

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### Performance Indicators

- Performance indicators for **PRINCIPLES OF BUSINESS ADMINISTRATION** role-plays and exams will be selected from the business administration core (Tier 1).
- Performance indicators for **TEAM DECISION MAKING** case studies and exams will be selected from the business administration core (Tier 1) and appropriate career cluster (Tier 2).
- Performance indicators for **INDIVIDUAL SERIES** exams will be selected from the business administration core (Tier 1) and appropriate career cluster (Tier 2). Performance indicators for the role-plays will be selected from the business administration core (Tier 1), appropriate career cluster (Tier 2) and appropriate pathway (Tier 3).

### Key

PQ = Prerequisite level performance indicator content develops employability and job-survival skills and concepts, including work ethics, personal appearance, and general business behavior.

CS = Career Sustaining level performance indicator content develops skills and knowledge needed for continued employment in or study of business based on the application of basic academics and business skills.

SP = Specialist level performance indicator content provides in-depth, solid understanding and skill development in all business functions.

*An asterisk (\*) indicates a new performance indicator.*

The **Business Administration Core** performance indicators will be used when preparing for all exams, role-play scenarios, and case studies in the following events:

- Business Law and Ethics Decision Making
- Human Resources Management Series

## **Instructional Area: Business Law (BL)**

**Standard: Understands business's responsibility to know, abide by, and enforce laws and regulations that affect business operations and transactions**

**Performance Element: Acquire foundational knowledge of business laws and regulations to understand their nature and scope.**

**Performance Indicators:**

Comply with the spirit and intent of laws and regulations (BL:163) (CS)\*

Discuss the nature of law and sources of law in the United States (BL:067) (SP)

Describe the United States' judicial system (BL:068) (SP)

Describe methods used to protect intellectual property (BL:051) (SP)

Describe legal issues affecting businesses (BL:001) (SP)

**Performance Element: Understand the civil foundations of the legal environment of business to demonstrate knowledge of contracts.**

**Performance Indicators:**

Identify the basic torts relating to business enterprises (BL:069) (SP)

Describe the nature of legally binding contracts (BL:002) (SP)

**Performance Element: Explore the regulatory environment of United States' businesses to understand the diversity of regulations.**

**Performance Indicators:**

Describe the nature of legal procedure (BL:070) (SP)

Discuss the nature of debtor-creditor relationships (BL:071) (SP)

Explain the nature of agency relationships (BL:072) (SP)

Discuss the nature of environmental law (BL:073) (SP)

Discuss the role of administrative law (BL:074) (SP)

**Performance Element: Apply knowledge of business ownership to establish and continue business operations.**

**Performance Indicators:**

Explain types of business ownership (BL:003) (CS)

**Performance Element: Acquire knowledge of commerce laws and regulations to continue business operations.**

**Performance Indicators:**

Explain the nature of import/export law (BL:145) (SP)

Describe the nature of customs regulations (BL:126) (SP)

## Instructional Area: Communication Skills (CO)

**Standard: Understands the concepts, strategies, and systems used to obtain and convey ideas and information**

**Performance Element: Read to acquire meaning from written material and to apply the information to a task.**

**Performance Indicators:**

Identify sources that provide relevant, valid written material (CO:054) (PQ)

Extract relevant information from written materials (CO:055) (PQ)

Apply written directions to achieve tasks (CO:056) (PQ)

Analyze company resources to ascertain policies and procedures (CO:057) (CS)

**Performance Element: Apply active listening skills to demonstrate understanding of what is being said.**

**Performance Indicators:**

Explain communication techniques that support and encourage a speaker (CO:082) (PQ)

Follow oral directions (CO:119) (PQ)

Demonstrate active listening skills (CO:017) (PQ)

**Performance Element: Apply verbal skills to obtain and convey information.**

**Performance Indicators:**

Explain the nature of effective verbal communications (CO:147) (PQ)

Ask relevant questions (CO:058) (PQ)

Interpret others' nonverbal cues (CO:059) (PQ)

Provide legitimate responses to inquiries (CO:060) (PQ)

Give verbal directions (CO:083) (PQ)

Employ communication styles appropriate to target audience (CO:084) (CS)

Defend ideas objectively (CO:061) (CS)

Handle telephone calls in a businesslike manner (CO:114) (CS)

Participate in group discussions (CO:053) (CS)

Facilitate (lead) group discussions (CO:201) (SP)

Make oral presentations (CO:025) (SP)

**Performance Element: Record information to maintain and present a report of business activity.**

**Performance Indicators:**

Utilize note-taking strategies (CO:085) (CS)

Organize information (CO:086) (CS)

Select and use appropriate graphic aids (CO:087) (CS)

**Performance Element: Write internal and external business correspondence to convey and obtain information effectively.****Performance Indicators:**

- Explain the nature of effective written communications (CO:016) (CS)
- Select and utilize appropriate formats for professional writing (CO:088) (CS)
- Edit and revise written work consistent with professional standards (CO:089) (CS)
- Write professional emails (CO:090) (CS)
- Write business letters (CO:133) (CS)
- Write informational messages (CO:039) (CS)
- Write inquiries (CO:040) (CS)
- Write persuasive messages (CO:031) (SP)
- Write executive summaries (CO:091) (SP)
- Prepare simple written reports (CO:094) (SP)
- Explain how digital communications (e.g., email, text messages, chats) exposes business to risk (CO:202) (SP)
- Adapt written correspondence to targeted audiences (CO:203) (SP)
- Use data visualization techniques (e.g., infographics, heat-maps, dynamic model outputs) (CO:204) (SP)

**Performance Element: Use social media to communicate with a business's stakeholders.****Performance Indicators:**

- Describe the impact of a person's social media brand on the achievement of organizational objectives (CO:205) (CS)
- Distinguish between using social media for business and personal purposes (CO:206) (CS)

**Performance Element: Communicate with staff to clarify workplace objectives.****Performance Indicators:**

- Explain the nature of staff communication (CO:014) (CS)
- Choose and use appropriate channel for workplace communication (CO:092) (CS)
- Participate in a staff meeting (CO:063) (CS)
- Participate in problem-solving groups (CO:067) (CS)

## **Instructional Area: Customer Relations (CR)**

**Standard: Understands the techniques and strategies used to foster positive, ongoing relationships with customers**

**Performance Element: Foster positive relationships with customers to enhance company image.**

**Performance Indicators:**

Explain the nature of positive customer relations (CR:003) (CS)

Demonstrate a customer-service mindset (CR:004) (CS)

Develop rapport with customers (CR:029) (CS)

Reinforce service orientation through communication (CR:005) (CS)

Respond to customer inquiries (CR:006) (CS)

Adapt communication to the cultural and social differences among clients (CR:019) (CS)

Interpret business policies to customers/clients (CR:007) (CS)

Build and maintain relationships with customers (CR:030) (SP)

**Performance Element: Resolve conflicts with/for customers to encourage repeat business.**

**Performance Indicators:**

Handle difficult customers (CR:009) (CS)

Handle customer/client complaints (CR:010) (CS)

**Performance Element: Reinforce company's image to exhibit the company's brand promise.**

**Performance Indicators:**

Identify company's brand promise (CR:001) (CS)

Determine ways of reinforcing the company's image through employee performance (CR:002) (CS)

**Performance Element: Understand the nature of customer relationship management to show its contributions to a company.**

**Performance Indicators:**

Discuss the nature of customer relationship management (CR:016) (SP)

Explain the role of ethics in customer relationship management (CR:017) (SP)

Describe the use of technology in customer relationship management (CR:018) (SP)

## Instructional Area: Economics (EC)

**Standard: Understands the economic principles and concepts fundamental to business operations**

**Performance Element: Understand fundamental economic concepts to obtain a foundation for employment in business.**

**Performance Indicators:**

- Distinguish between economic goods and services (EC:002) (CS)
- Explain the concept of economic resources (EC:003) (CS)
- Describe the concepts of economics and economic activities (EC:001) (CS)
- Determine economic utilities created by business activities (EC:004) (CS)
- Explain the principles of supply and demand (EC:005) (CS)
- Describe the functions of prices in markets (EC:006) (CS)

**Performance Element: Understand the nature of business to show its contributions to society.**

**Performance Indicators:**

- Explain the role of business in society (EC:070) (CS)
- Describe types of business activities (EC:071) (CS)
- Describe types of business models (EC:138) (SP)
- Explain the organizational design of businesses (EC:103) (SP)
- Discuss the global environment in which businesses operate (EC:104) (SP)
- Describe factors that affect the business environment (EC:105) (SP)
- Explain the nature of business ethics (EC:106) (SP)
- Explain how organizations adapt to today's markets (EC:107) (SP)

**Performance Element: Understand economic systems to be able to recognize the environments in which businesses function.**

**Performance Indicators:**

- Explain the types of economic systems (EC:007) (CS)
- Identify the impact of small business/entrepreneurship on market economies (EC:065) (CS)
- Explain the concept of private enterprise (EC:009) (CS)
- Identify factors affecting a business's profit (EC:010) (CS)
- Determine factors affecting business risk (EC:011) (CS)
- Explain the concept of competition (EC:012) (CS)

**Performance Element: Acquire knowledge of the impact of government on business activities to make informed economic decisions.**

**Performance Indicators:**

- Determine the relationship between government and business (EC:008) (CS)
- Describe the nature of taxes (EC:072) (SP)



**Performance Element: Analyze cost/profit relationships to guide business decision-making.****Performance Indicators:**

Explain the concept of productivity (EC:013) (CS)

Analyze impact of specialization/division of labor on productivity (EC:014) (SP)

Explain the concept of organized labor and business (EC:015) (SP)

Explain the impact of the law of diminishing returns (EC:023) (SP)

**Performance Element: Understand economic indicators to recognize economic trends and conditions.****Performance Indicators:**

Discuss the measure of consumer spending as an economic indicator (EC:081) (SP)

Describe the economic impact of inflation on business (EC:083) (SP)

Explain the concept of Gross Domestic Product (GDP) (EC:017) (SP)

Discuss the impact of a nation's unemployment rates (EC:082) (SP)

Explain the economic impact of interest-rate fluctuations (EC:084) (SP)

Determine the impact of business cycles on business activities (EC:018) (SP)

**Performance Element: Understand global trade's impact to aid business decision-making.****Performance Indicators:**

Explain the nature of global trade (EC:016) (SP)

Discuss the impact of globalization on business (EC:109) (SP)

Describe the determinants of exchange rates and their effects on the domestic economy (EC:100) (SP)

Explain cultural considerations that impact global business relations (EC:110) (SP)

Discuss the impact of cultural and social environments on global trade (EC:045) (SP)

Describe the impact of electronic communication tools (e.g., Internet, video- and computer-conferencing, webcasts, email) on global business activities (EC:111) (SP)

Explain the impact of major trade alliances on business activities (EC:112) (SP)

Describe the impact of the political environment on world trade (EC:113) (SP)

Explain the impact of geography on world trade (EC:114) (SP)

Describe the impact of a country's history on world trade (EC:115) (SP)

Explain the impact of a country's economic development on world trade (EC:116) (SP)

Discuss the impact of bribery and foreign monetary payments on business (EC:140) (SP)

Identify requirements for international business travel (e.g., passport, visa, proof of citizenship, immunizations, and sponsorship letters) (EC:141) (SP)

## Instructional Area: Emotional Intelligence (EI)

**Standard: Understands techniques, strategies, and systems used to foster self-understanding and enhance relationships with others**

**Performance Element: Foster self-understanding to recognize the impact of personal feelings on others.**

**Performance Indicators:**

- Describe the nature of emotional intelligence (EI:001) (PQ)
- Explain the concept of self-esteem (EI:016) (PQ)
- Recognize and overcome personal biases and stereotypes (EI:017) (PQ)
- Assess personal strengths and weaknesses (EI:002) (PQ)
- Assess personal behavior and values (EI:126) (PQ)\*

**Performance Element: Develop personal traits to foster career advancement.**

**Performance Indicators:**

- Identify desirable personality traits important to business (EI:018) (PQ)
- Exhibit self-confidence (EI:023) (PQ)
- Demonstrate interest and enthusiasm (EI:020) (PQ)
- Demonstrate initiative (EI:024) (PQ)

**Performance Element: Apply ethics to demonstrate trustworthiness.**

**Performance Indicators:**

- Demonstrate honesty and integrity (EI:022) (PQ)
- Demonstrate responsible behavior (EI:021) (PQ)
- Demonstrate fairness (EI:127) (PQ)\*
- Assess risks of personal decisions (EI:091) (PQ)\*
- Demonstrate ethical work habits (EI:004) (PQ)
- Take responsibility for decisions and actions (EI:075) (PQ)
- Build trust in relationships (EI:128) (CS)\*
- Describe the nature of ethics (EI:123) (CS)\*
- Explain reasons for ethical dilemmas (EI:124) (CS)\*
- Recognize and respond to ethical dilemmas (EI:125) (CS)\*
- Manage commitments in a timely manner (EI:077) (CS)
- Develop tolerance for ambiguity (EI:092) (CS)\*

**Performance Element: Exhibit techniques to manage emotional reactions to people and situations.**

**Performance Indicators:**

- Exhibit a positive attitude (EI:019) (PQ)
- Demonstrate self-control (EI:025) (PQ)
- Explain the use of feedback for personal growth (EI:003) (PQ)
- Adjust to change (EI:026) (PQ)

**Performance Element: Identify with others' feelings, needs, and concerns to enhance interpersonal relations.****Performance Indicators:**

- Respect the privacy of others (EI:029) (PQ)
- Show empathy for others (EI:030) (PQ)
- Maintain the confidentiality of others (EI:103) (CS)
- Exhibit cultural sensitivity (EI:033) (CS)
- Leverage personality types in business situations (EI:104) (SP)

**Performance Element: Use communication skills to foster open, honest communications.****Performance Indicators:**

- Explain the nature of effective communications (EI:007) (PQ)
- Explain ethical considerations in providing information (EI:038) (SP)
- Foster open, honest communication (EI:129) (SP)\*
- Collaborate with others (EI:130) (SP)\*
- Solicit feedback (EI:106) (SP)
- Use social media to solicit new ideas and solutions (EI:107) (SP)

**Performance Element: Use communication skills to influence others.****Performance Indicators:**

- “Sell” ideas to others (EI:108) (SP)
- Persuade others (EI:012) (SP)
- Demonstrate negotiation skills (EI:062) (SP)

**Performance Element: Manage stressful situations to minimize potential negative impact.****Performance Indicators:**

- Use appropriate assertiveness (EI:008) (PQ)
- Use conflict-resolution skills (EI:015) (CS)
- Explain the nature of office politics (EI:109) (CS)
- Overcome problems and difficulties associated with office politics/turf wars (EI:095) (CS)
- Explain the nature of stress management (EI:028) (SP)

**Performance Element: Implement teamwork techniques to accomplish goals.****Performance Indicators:**

- Participate as a team member (EI:045) (CS)
- Use consensus-building skills (EI:011) (SP)
- Motivate team members (EI:059) (SP)

**Performance Element: Employ leadership skills to achieve workplace objectives.****Performance Indicators:**

- Explain the concept of leadership (EI:009) (CS)
- Explain the nature of ethical leadership (EI:131) (CS)\*
- Model ethical behavior (EI:132) (CS)\*
- Determine personal vision (EI:063) (CS)
- Inspire others (EI:133) (CS)\*
- Demonstrate adaptability (EI:006) (CS)
- Develop an achievement orientation (EI:027) (CS)
- Challenge the status quo (EI:134) (CS)\*
- Lead change (EI:005) (CS)
- Enlist others in working toward a shared vision (EI:060) (CS)
- Coach others (EI:041) (CS)
- Use power appropriately (EI:135) (SP)\*
- Recognize/Reward others for their efforts and contributions (EI:014) (SP)\*

**Performance Element: Manage internal and external business relationships to foster positive interactions.****Performance Indicators:**

- Treat others with dignity and respect (EI:036) (PQ)
- Foster positive working relationships (EI:037) (CS)
- Consider conflicting viewpoints (EI:136) (CS)\*
- Assess long-term value and impact of actions on others (EI:137) (SP)\*
- Maintain collaborative partnerships with colleagues (EI:061) (SP)
- Explain the impact of political relationships within an organization (EI:034) (SP)
- Explain the nature of organizational culture (EI:064) (SP)
- Interpret and adapt to a business's culture (EI:112) (SP)

**Instructional Area: Entrepreneurship (EN)****Standard: Understands the concepts, processes, and skills associated with identifying new ideas, opportunities, and methods and with creating or starting a new project or venture****Performance Element: Understand fundamental factors about entrepreneurship to recognize its role and importance in the economy****Performance Indicators:**

- Describe the nature of entrepreneurship (EN:039) (SP)
- Explain the role requirements of entrepreneurs and owners (EN:040) (SP)
- Describe small-business opportunities in international trade (EN:041) (SP)

## Instructional Area: Financial Analysis (FI)

**Standard: Understands tools, strategies, and systems used to maintain, monitor, control, and plan the use of financial resources**

**Performance Element: Understand the fundamental principles of money needed to make financial exchanges.**

**Performance Indicators:**

Explain forms of financial exchange (cash, credit, debit, electronic funds transfer, etc.) (FI:058) (PQ)

Identify types of currency (paper money, coins, banknotes, government bonds, treasury notes, etc.) (FI:059) (PQ)

Describe functions of money (medium of exchange, unit of measure, store of value) (FI:060) (PQ)

Describe sources of income (wages/salaries, interest, rent, dividends, transfer payments, etc.) (FI:061) (PQ)

Explain the time value of money (FI:062) (CS)

Explain the purposes and importance of credit (FI:002) (CS)

Explain legal responsibilities associated with financial exchanges (FI:063) (CS)

**Performance Element: Analyze financial needs and goals to determine financial requirements.**

**Performance Indicators:**

Explain the nature of financial needs (e.g., college, retirement, wills, insurance, etc.) (FI:064) (CS)

Explain the need to save and invest (FI:270) (CS)

Set financial goals (FI:065) (CS)

Develop personal budget (FI:066) (CS)

Determine personal net worth (FI:562) (CS)\*

**Performance Element: Manage personal finances to achieve financial goals.**

**Performance Indicators:**

Explain the nature of tax liabilities (FI:067) (PQ)

Interpret a pay stub (FI:068) (PQ)

Prepare bank account documents (e.g., checks, deposit/withdrawal slips, endorsements, etc.) (FI:560) (PQ)

Maintain financial records (FI:069) (PQ)

Read and reconcile bank statements (FI:070) (PQ)

Calculate the cost of credit (FI:782) (CS)\*

Demonstrate the wise use of credit (FI:071) (CS)

Validate credit history (FI:072) (CS)

Make responsible financial decisions (FI:783) (CS)\*

Protect against identity theft (FI:073) (CS)

Pay bills (FI:565) (CS)\*  
Apply for a consumer loan (FI:625) (SP)\*  
Control debt (FI:568) (CS)\*  
Prepare personal income tax forms (i.e., 1040 EZ form) (FI:074) (CS)  
Discuss the nature of retirement planning (FI:569) (CS)\*  
Explain the nature of estate planning (FI:572) (CS)\*

**Performance Element: Understand the use of financial-services providers to aid in financial-goal achievement.**

**Performance Indicators:**

Describe types of financial-services providers (FI:075) (CS)  
Discuss considerations in selecting a financial-services provider (FI:076) (CS)

**Performance Element: Use investment strategies to ensure financial well-being.**

**Performance Indicators:**

Explain types of investments (FI:077) (CS)

**Performance Element: Use risk management products to protect a business's financial well-being.**

**Performance Indicators:**

Describe the concept of insurance (FI:081) (CS)

**Performance Element: Acquire a foundational knowledge of accounting to understand its nature and scope.**

**Performance Indicators:**

Describe the need for financial information (FI:579) (CS)  
Explain the concept of accounting (FI:085) (CS)  
Discuss the role of ethics in accounting (FI:351) (SP)  
Explain the use of technology in accounting (FI:352) (SP)  
Explain legal considerations for accounting (FI:353) (SP)

**Performance Element: Implement accounting procedures to track money flow and to determine financial status.**

**Performance Indicators:**

Describe the nature of cash flow statements (FI:091) (SP)  
Explain the nature of balance sheets (FI:093) (SP)  
Describe the nature of income statements (FI:094) (SP)

**Performance Element: Acquire a foundational knowledge of finance to understand its nature and scope.**

**Performance Indicators:**

Explain the role of finance in business (FI:354) (CS)

Discuss the role of ethics in finance (FI:355) (SP)

Explain legal considerations for finance (FI:356) (SP)

**Performance Element: Manage financial resources to ensure solvency.**

**Performance Indicators:**

Describe the nature of budgets (FI:106) (SP)

## **Instructional Area: Human Resources Management (HR)**

**Standard: Understands the tools, techniques, and systems that businesses use to plan, staff, lead, and organize its human resources**

**Performance Element: Understand the role and function of human resources management to obtain a foundational knowledge of its nature and scope.**

**Performance Indicators:**

Discuss the nature of human resources management (HR:410) (CS)

Explain the role of ethics in human resources management (HR:411) (SP)

Describe the use of technology in human resources management (HR:412) (SP)

**Performance Element: Manage staff growth and development to increase productivity and employee satisfaction.**

**Performance Indicators:**

Orient new employees (HR:360) (CS)

## **Instructional Area: Marketing (MK)**

**Standard: Understands the tools, techniques, and systems that businesses use to create exchanges and satisfy organizational objectives**

**Performance Element: Understand marketing's role and function in business to facilitate economic exchanges with customers.**

**Performance Indicators:**

Explain marketing and its importance in a global economy (MK:001) (CS)

Describe marketing functions and related activities (MK:002) (CS)

**Performance Element: Acquire foundational knowledge of customer/client/business behavior to understand what motivates decision-making.**

**Performance Indicators:**

Explain factors that influence customer/client/business buying behavior (MK:014) (SP)

Discuss actions employees can take to achieve the company's desired results (MK:015) (SP)

Demonstrate connections between company actions and results (e.g., influencing consumer buying behavior, gaining market share, etc.) (MK:019) (SP)

## **Instructional Area: Information Management (NF)**

**Standard: Understands tools, strategies, and systems needed to access, process, maintain, evaluate, and disseminate information to assist business decision-making**

**Performance Element: Use information literacy skills to increase workplace efficiency and effectiveness.**

**Performance Indicators:**

- Assess information needs (NF:077) (CS)
- Obtain needed information efficiently (NF:078) (CS)
- Evaluate quality and source of information (NF:079) (CS)
- Draw conclusions based on information analysis (NF:278) (CS)\*
- Apply information to accomplish a task (NF:080) (CS)
- Store information for future use (NF:081) (CS)

**Performance Element: Acquire a foundational knowledge of information management to understand its nature and scope.**

**Performance Indicators:**

- Discuss the nature of information management (NF:110) (CS)
- Explain the role of ethics in information management (NF:111) (SP)
- Explain legal issues associated with information management (NF:076) (SP)

**Performance Element: Utilize information-technology tools to manage and perform work responsibilities.**

**Performance Indicators:**

- Identify ways that technology impacts business (NF:003) (PQ)
- Explain the role of information systems (NF:083) (PQ)
- Discuss principles of computer systems (NF:084) (PQ)
- Use basic operating systems (NF:085) (PQ)
- Describe the scope of the Internet (NF:086) (PQ)
- Demonstrate basic e-mail functions (NF:004) (PQ)
- Demonstrate personal information management/productivity applications (NF:005) (PQ)
- Demonstrate basic web-search skills (NF:006) (PQ)
- Demonstrate basic word processing skills (NF:007) (PQ)
- Demonstrate basic presentation applications (NF:008) (PQ)
- Demonstrate basic database applications (NF:009) (PQ)
- Demonstrate basic spreadsheet applications (NF:010) (PQ)
- Use an integrated business software application package (NF:088) (CS)
- Demonstrate collaborative/groupware applications (NF:011) (CS)
- Create and post basic web page (NF:042) (CS)
- Collaborate on and aggregate complex internal documents to create a common voice (NF:215) (SP)



**Performance Element: Maintain business records to facilitate business operations.**

**Performance Indicators:**

Describe the nature of business records (NF:001) (SP)

Maintain customer records (NF:002) (SP)

**Performance Element: Acquire information to guide business decision-making.**

**Performance Indicators:**

Describe current business trends (NF:013) (SP)

Monitor internal records for business information (NF:014) (SP)

Conduct an environmental scan to obtain business information (NF:015) (SP)

Interpret statistical findings (NF:093) (SP)

Translate research findings into actionable business recommendations (NF:216) (SP)

**Performance Element: Create and access databases to acquire information for business decision-making.**

**Performance Indicators:**

Explain the principles of data analysis (NF:139) (SP)

Explain the nature of tools that can be used to access information in the database system (NF:140) (SP)

Access information in the database system (NF:141) (SP)

**Performance Element: Apply data mining methods to acquire pertinent information for business decision-making.**

**Performance Indicators:**

Discuss the nature of data mining (NF:148) (CS)

Describe data mining tools and techniques (NF:149) (SP)

Discuss the importance of ethics in data mining (NF:150) (SP)

Demonstrate basic data mining techniques (NF:151) (SP)

Interpret data mining findings (NF:152) (SP)

## **Instructional Area: Operations (OP)**

**Standard: Understands the processes and systems implemented to monitor, plan, and control the day-to-day activities required for continued business functioning**

**Performance Element: Understand operation's role and function in business to value its contribution to a company.**

**Performance Indicators:**

Explain the nature of operations (OP:189) (CS)

Discuss the role of ethics in operations (OP:190) (SP)

Describe the use of technology in operations (OP:191) (SP)

**Performance Element: Adhere to health and safety regulations to support a safe work environment.**

**Performance Indicators:**

Describe health and safety regulations in business (OP:004) (PQ)

Report noncompliance with business health and safety regulations (OP:005) (PQ)

**Performance Element: Implement safety procedures to minimize loss.**

**Performance Indicators:**

Follow instructions for use of equipment, tools, and machinery (OP:006) (PQ)

Follow safety precautions (OP:007) (PQ)

Maintain a safe work environment (OP:008) (CS)

Explain procedures for handling accidents (OP:009) (CS)

Handle and report emergency situations (OP:010) (CS)

**Performance Element: Implement security policies/procedures to minimize chance for loss.**

**Performance Indicators:**

Explain routine security precautions (OP:013) (CS)

Follow established security procedures/policies (OP:152) (CS)

Protect company information and intangibles (OP:153) (CS)

**Performance Element: Comply with security rules, regulations, and codes (e.g., property, privacy, access, confidentiality) to protect customer and company information, reputation, and image.**

**Performance Indicators:**

Explain information privacy, security, and confidentiality considerations in business (OP:441) (CS)

Maintain data security (OP:064) (CS)

**Performance Element: Utilize project-management skills to improve workflow and minimize costs.**

**Performance Indicators:**

Plan project (OP:519) (CS)\*

Monitor projects and take corrective actions (OP:520) (CS)\*

Evaluate project success (OP:521) (CS)\*

Explain the nature of project management (OP:158) (SP)

Identify resources needed for project (OP:003) (SP)

Develop project plan (OP:001) (SP)

Apply project-management tools to monitor and communicate project progress (OP:002) (SP)

Evaluate project results (OP:159) (SP)

**Performance Element: Implement purchasing activities to obtain business supplies, equipment, resources, and services.**

**Performance Indicators:**

Explain the nature and scope of purchasing (OP:015) (CS)

Place orders/reorders (OP:016) (CS)

Maintain inventory of supplies (OP:031) (CS)

Discuss the importance of utilizing ethical purchasing methods (OP:246) (SP)

Explain the impact of the purchasing process on productivity (OP:247) (SP)

Manage the bid process in purchasing (OP:160) (SP)

Select vendors (OP:161) (SP)

Evaluate vendor performance (OP:162) (SP)

**Performance Element: Understand production's role and function in business to recognize its need in an organization.**

**Performance Indicators:**

Explain the concept of production (OP:017) (CS)

**Performance Element: Implement quality-control processes to minimize errors and to expedite workflow.**

**Performance Indicators:**

Identify quality-control measures (OP:163) (SP)

Utilize quality control methods at work (OP:164) (SP)

Describe crucial elements of a quality culture (OP:019) (SP)

**Performance Element: Implement expense-control strategies to enhance a business's financial wellbeing.**

**Performance Indicators:**

Explain the nature of overhead/operating costs (OP:024) (SP)

Explain employee's role in expense control (OP:025) (SP)

**Performance Element: Maintain property and equipment to facilitate ongoing business activities.**

**Performance Indicators:**

Comply with policies and procedures for use of property and equipment (OP:442) (CS)

**Performance Element: Understand supply chain management role to recognize its need in business.**

**Performance Indicators:**

Explain the concept of supply chain (OP:443) (CS)

Explain the benefits of supply chain collaboration (OP:444) (SP)

## **Instructional Area: Professional Development (PD)**

**Standard: Understands concepts, tools, and strategies used to explore, obtain, and develop in a business career**

**Performance Element: Acquire self-development skills to enhance relationships and improve efficiency in the work environment.**

**Performance Indicators:**

Maintain appropriate personal appearance (PD:002) (PQ)

Demonstrate systematic behavior (PD:009) (PQ)

Set personal goals (PD:018) (CS)

Balance personal and professional responsibilities (PD:179) (SP)

**Performance Element: Understand and follow company rules and regulations to maintain employment.**

**Performance Indicators:**

Adhere to company protocols and policies (PD:250) (CS)

Follow rules of conduct (PD:251) (CS)

Follow chain of command (PD:252) (CS)

**Performance Element: Achieve organizational goals to contribute to company growth.**

**Performance Indicators:**

Determine the nature of organizational goals (PD:254) (SP)

Ascertain employee's role in meeting organizational goals (PD:255) (SP)

**Performance Element: Utilize critical-thinking skills to determine best options/outcomes.**

**Performance Indicators:**

Explain the need for innovation skills (PD:126) (CS)

Make decisions (PD:017) (CS)

Demonstrate problem-solving skills (PD:077) (CS)

Demonstrate appropriate creativity (PD:012) (SP)

Use time-management skills (PD:019) (SP)

**Performance Element: Participate in career planning to enhance job-success potential.**

**Performance Indicators:**

Assess personal interests and skills needed for success in business (PD:013) (PQ)

Analyze employer expectations in the business environment (PD:020) (PQ)

Explain the rights of workers (PD:021) (PQ)

Identify sources of career information (PD:022) (CS)

Identify tentative occupational interest (PD:023) (CS)

Explain employment opportunities in business (PD:025) (CS)

Explain career opportunities in entrepreneurship (PD:066) (CS)

**Performance Element: Implement job-seeking skills to obtain employment.****Performance Indicators:**

Utilize job-search strategies (PD:026) (PQ)

Complete a job application (PD:027) (PQ)

Interview for a job (PD:028) (PQ)

Write a follow-up letter after job interviews (PD:029) (CS)

Write a letter of application (PD:030) (CS)

Prepare a résumé (PD:031) (CS)

Use networking techniques to identify employment opportunities (PD:037) (SP)

**Performance Element: Utilize career-advancement activities to enhance professional development.****Performance Indicators:**

Describe techniques for obtaining work experience (e.g., volunteer activities, internships) (PD:032) (PQ)

Explain the need for ongoing education as a worker (PD:033) (PQ)

Explain possible advancement patterns for jobs (PD:034) (PQ)

Identify skills needed to enhance career progression (PD:035) (SP)

Utilize resources that can contribute to professional development (e.g., trade journals/periodicals, professional/trade associations, classes/seminars, trade shows, and mentors) (PD:036) (SP)

**Instructional Area: Strategic Management (SM)**

**Standard: Understands tools, techniques, and systems that affect a business's ability to plan, control, and organize an organization/department**

**Performance Element: Recognize management's role to understand its contribution to business success.****Performance Indicators:**

Explain the concept of management (SM:001) (CS)

**Performance Element: Identify potential business threats and opportunities to protect a business's financial well-being.****Performance Indicators:**

Explain the nature of risk management (SM:075) (SP)

Conduct a risk assessment of an event (SM:076) (SP)

The **Business Management and Administration Career Cluster** performance indicators will be used when preparing for all exams, role-play scenarios, and case studies in the following events:

- Business Law and Ethics Decision Making
- Human Resources Management Series

## **Instructional Area: Business Law (BL)**

**Standard: Understands business's responsibility to know, abide by, and enforce laws and regulations that affect business operations and transactions**

**Performance Element: Acquire foundational knowledge of the legal environment in which businesses operate to protect the company's well-being.**

**Performance Indicators:**

Describe factors affecting the settlement of legal matters (BL:159) (SP)

Describe the litigation process (BL:160) (SP)

Discuss the arbitration/mediation process (BL:161) (SP)

## **Instructional Area: Communication Skills (CO)**

**Standard: Understands the concepts, strategies, and systems used to obtain and convey ideas and information**

**Performance Element: Write internal and external business correspondence to convey and obtain information effectively.**

**Performance Indicators:**

Write analytical reports (i.e., reports that examine a problem/issue and recommend an action) (CO:185) (SP)

Write research reports (CO:186) (SP)

## **Instructional Area: Financial Analysis (FI)**

**Standard: Understands tools, strategies, and systems used to maintain, monitor, control, and plan the use of financial resources**

**Performance Element: Manage financial resources to ensure solvency.**

**Performance Indicators:**

Interpret cash-flow statements (FI:541) (SP)

## **Instructional Area: Information Management (NF)**

**Standard: Understands tools, strategies, and systems needed to access, process, maintain, evaluate, and disseminate information to assist business decision-making**

**Performance Element: Utilize information-technology tools to manage and perform work responsibilities.**

**Performance Indicators:**

Utilize project-management software (NF:130) (SP)

**Performance Element: Utilize technology to support business strategies and operations.**

**Performance Indicators:**

Adhere to data change best practices (NF:264) (SP)

## **Instructional Area: Operations (OP)**

**Standard: Understands the processes and systems implemented to monitor, plan, and control the day-to-day activities required for continued business functioning**

**Performance Element: Understand operation's role and function in business to value its contribution to a company.**

**Performance Indicators:**

Discuss legal considerations in operations (OP:339) (SP)

**Performance Element: Comply with security rules, regulations, and codes (e.g., property, privacy, access, confidentiality) to protect customer and company information, reputation, and image.**

**Performance Indicators:**

Comply with strategies for protecting business' digital assets (e.g., website, social media, email, etc.) (OP:517) (SP)

Comply with strategies to protect digital customer data (e.g., information about customers, customers' credit-card numbers, passwords, customer transactions) (OP:518) (SP)

**Performance Element: Implement purchasing activities to obtain business supplies, equipment, resources, and services.**

**Performance Indicators:**

Describe types of purchase orders (OP:250) (CS)

Discuss types of inventory (OP:336) (CS)



**Performance Element: Develop an understanding of business analysis to improve business functions and activities.**

**Performance Indicators:**

Discuss the nature of business analysis (OP:327) (SP)

Discuss business process thinking and its impact (OP:474) (SP)

Describe the factors that influence business process design (OP:475) (SP)

Explain the causes of business process changes (OP:476) (SP)

**Performance Element: Understand supply chain management role to recognize its need in business.**

**Performance Indicators:**

Explain the impact of supply chain on business performance (e.g., value, customer satisfaction, business design, sustainability) (OP:477) (SP)

Describe the impact of technology on supply chain management (OP:478) (SP)

Describe supply chain networks (OP:479) (SP)

Discuss global supply chain issues (OP:480) (SP)

Discuss the nature of supply chain management (OP:303) (SP)

**Performance Element: Maintain work flow to enhance productivity.**

**Performance Indicators:**

Organize and prioritize work (OP:228) (CS)

Coordinate work with that of team members (OP:230) (CS)

Monitor and ensure completion of delegated tasks (OP:354) (SP)

Streamline work processes (OP:355) (SP)

**Performance Element: Manage purchasing activities to obtain the best service/product at the least cost.**

**Performance Indicators:**

Maintain vendor/supplier relationships (OP:241) (SP)

Negotiate terms with vendors in business (OP:337) (SP)

## **Instructional Area: Professional Development (PD)**

**Standard: Understands concepts, tools, and strategies used to explore, obtain, and develop in a business career**

**Performance Element: Participate in career planning to enhance job-success potential.**

**Performance Indicators:**

Discuss employment opportunities in business management and administration (PD:297) (CS)

## Instructional Area: Strategic Management (SM)

**Standard: Understands tools, techniques, and systems that affect a business's ability to plan, control, and organize an organization/department**

**Performance Element: Recognize management's role to understand its contribution to business success.**

**Performance Indicators:**

Discuss the nature of managerial planning (SM:063) (SP)

Explain managerial considerations in organizing (SM:064) (SP)

Describe managerial considerations in staffing (SM:065) (SP)

Discuss managerial considerations in directing (SM:066) (SP)

Describe the nature of managerial control (control process, types of control, what is controlled) (SM:004) (SP)

**Performance Element: Adapt to and manage change within an organization to accomplish organizational objectives.**

**Performance Indicators:**

Describe relationship among innovation, learning, and change (SM:094) (CS)

Explain the nature of change management (SM:095) (SP)

Explain the change-management lifecycle (SM:096) (SP)

## Instructional Area: Knowledge Management (KM)

**Standard: Understands the systems, strategies, and techniques used to collect, organize, analyze, and share information known in an organization**

**Performance Element: Acquire a foundational understanding of knowledge management to understand its nature and scope.**

**Performance Indicators:**

Explain the nature of knowledge management (KM:001) (SP)

Discuss the role of ethics in knowledge management (KM:002) (SP)

Explain the use of technology in knowledge management (KM:003) (SP)

Explain legal considerations for knowledge management (KM:004) (SP)

**Performance Element: Use knowledge management strategies to improve the performance and competitive advantage of an organization.**

**Performance Indicators:**

Identify techniques that can be used to capture and transfer knowledge in an organization (KM:005) (SP)

Apply knowledge management processes (KM:018) (SP)

## Instructional Area: Project Management (PJ)

**Standard: Understands tools, techniques, and systems that are used to plan, implement, monitor, and evaluate business projects**

**Performance Element: Utilize project management skills to start, run, and end projects.**

**Performance Indicators:**

Initiate project (PJ:005) (SP)

Prepare work breakdown structure (WBS) (PJ:006) (SP)

Execute and control projects (PJ:009) (SP)

Manage project team (PJ:007) (SP)

Manage project schedule (PJ:010) (SP)

Close project (PJ:008) (SP)

## Instructional Area: Quality Management (QM)

**Standard: Understands the need for standards and the strategies and techniques used to implement, monitor, and evaluate them**

**Performance Element: Understand the role and function of quality management to obtain a foundational knowledge of its nature and scope.**

**Performance Indicators:**

Explain the nature of quality management (QM:001) (SP)

Describe the nature of quality management frameworks (e.g., Six Sigma, ITIL, CMMI) (QM:002) (SP)

Discuss the need for continuous improvement of the quality process (QM:003) (SP)

## Instructional Area: Risk Management (RM)

**Standard: Understands risk-management strategies and techniques used to minimize business loss**

**Performance Element: Acquire a foundational understanding of risk management to demonstrate knowledge of its nature and scope.**

**Performance Indicators:**

Explain the role of ethics in risk management (RM:041) (SP)

Describe the use of technology in risk management (RM:042) (SP)

Discuss legal considerations affecting risk management (RM:043) (SP)

Describe international considerations affecting risk management (RM:092) (SP)

The Business Management and Administration Pathway performance indicators will be used when preparing for the role-play scenarios for the following event:

- Human Resources Management Series Event (Human Resources Management Pathway, pp. 45-51)

## **Instructional Area: Communication Skills (CO)**

**Standard: Understands the concepts, strategies, and systems used to obtain and convey ideas and information**

**Performance Element: Facilitate internal/external office communications to support work activities.**

**Performance Indicators:**

Greet and direct visitors (CO:181) (CS)

Take and relay messages (CO:182) (CS)

Field telephone calls (CO:183) (CS)

Arrange call-backs (CO:191) (CS)

Screen telephone calls (CO:184) (CS)

**Performance Element: Communicate with staff to clarify workplace objectives.**

**Performance Indicators:**

Adapt to communications styles (written, verbal, formal/informal) (CO:192) (CS)

## **Instructional Area: Emotional Intelligence (EI)**

**Standard: Understands techniques, strategies, and systems used to foster self-understanding and enhance relationships with others**

**Performance Element: Apply ethics to demonstrate trustworthiness.**

**Performance Indicators:**

Exercise confidentiality (EI:076) (CS)

**Performance Element: Manage internal and external business relationships to foster positive interactions.**

**Performance Indicators:**

Act as the office “gatekeeper” (EI:094) (CS)

Initiate and facilitate social interactions in a business environment (EI:096) (SP)

Handle the social and protocol aspects of business (EI:097) (SP)

Maintain contact with key clients/customers (EI:098) (SP)

Entertain customers at the office (EI:099) (SP)

Act as the liaison between departments (EI:100) (SP)

## **Instructional Area: Financial Analysis (FI)**

**Standard: Understands tools, strategies, and systems used to maintain, monitor, control, and plan the use of financial resources**

**Performance Element: Implement accounting procedures to track money flow and to determine financial status.**

**Performance Indicators:**

Track expenses (FI:604) (SP)

**Performance Element: Maintain cash controls to track cash flow.**

**Performance Indicators:**

Explain cash control procedures (e.g., signature cards, deposit slips, internal/external controls, cash clearing, etc.) (FI:113) (CS)

Maintain petty-cash fund (FI:310) (SP)

Arrange advance travel cash (FI:603) (SP)

Manage purchasing cards (FI:778) (SP)

**Performance Element: Acquire fundamental knowledge of investment analysis and selection to make prudent investment decisions.**

**Performance Indicators:**

Describe information that can be obtained from annual reports (FI:277) (SP)

## **Instructional Area: Information Management (NF)**

**Standard: Understands tools, strategies, and systems needed to access, process, maintain, evaluate, and disseminate information to assist business decision-making**

**Performance Element: Utilize information-technology tools to manage and perform work responsibilities.**

**Performance Indicators:**

- Prepare expense report tools (NF:197) (SP)
- Demonstrate advanced web-search skills (NF:121) (SP)
- Demonstrate advanced word-processing skills (NF:122) (SP)
- Demonstrate advanced presentation applications (NF:123) (SP)
- Demonstrate advanced database applications (NF:124) (SP)
- Mine databases for information (NF:125) (SP)
- Demonstrate advanced spreadsheet applications (NF:126) (SP)
- Create a web page for business applications (NF:127) (SP)
- Manage website's content (NF:198) (SP)
- Prepare for cyber- and video-conferencing (NF:199) (SP)
- Capture text using OCR (optical character reader) software (NF:128) (SP)
- Use voice recognition technology to prepare documents (NF:129) (SP)
- Utilize imaging software (NF:131) (SP)
- Use accounting software (NF:200) (SP)

**Performance Element: Perform scheduling functions to facilitate on-time, prompt completion of work activities.**

**Performance Indicators:**

- Create calendar/schedule (NF:164) (CS)
- Maintain appointment calendar (NF:165) (CS)
- Verify appointments (NF:166) (CS)
- Schedule appointments (NF:188) (SP)
- Prepare itinerary (NF:189) (SP)
- Arrange accommodations and entertainment for visitors (NF:190) (SP)
- Make travel arrangements (NF:167) (SP)
- Make meeting arrangements (NF:168) (SP)

**Performance Element: Manage business records to maintain needed documentation.****Performance Indicators:**

- Process customer orders (NF:169) (CS)
- Route orders (NF:170) (CS)
- File records electronically/manually (NF:171) (CS)
- Organize and maintain files (NF:172) (CS)
- Collect documentation needed to compile reports (NF:173) (CS)
- Track shipping practices (NF:174) (CS)
- Complete boss's expense reports after trips (NF:191) (SP)
- Set up filing system appropriate for media/documents being stored (NF:175) (SP)
- Control incoming/outgoing documentation process (NF:176) (SP)
- Develop retention system appropriate for media/documents being stored (NF:177) (SP)
- Archive information according to retention procedures (NF:178) (SP)

**Performance Element: Prepare documentation to communicate with internal/external clients.****Performance Indicators:**

- Proofread documents (NF:180) (CS)
- Prepare company correspondence (NF:192) (CS)\*
- Prepare agendas (NF:194) (CS)
- Prepare materials for presentations (NF:195) (CS)
- Prepare reports (NF:181) (CS)
- Edit documents (NF:196) (SP)
- Prepare financial data (NF:182) (SP)

**Instructional Area: Operations (OP)****Standard: Understands the processes and systems implemented to monitor, plan, and control the day-to-day activities required for continued business functioning****Performance Element: Utilize organizational skills to support business operations.****Performance Indicators:**

- Organize and track project resources (OP:357) (SP)
- Plan meetings (OP:233) (SP)

**Performance Element: Implement purchasing activities to obtain business supplies, equipment, resources, and services.****Performance Indicators:**

- Re-order/purchase office supplies (OP:360) (CS)



**Performance Element: Implement quality-control processes to minimize errors and to expedite workflow.**

**Performance Indicators:**

Implement process improvement techniques (OP:362) (SP)

**Performance Element: Utilize office equipment to accomplish job assignments.**

**Performance Indicators:**

Operate calculator (OP:197) (PQ)

Operate copier (OP:198) (PQ)

Operate printer (OP:199) (PQ)

Operate fax machines (OP:200) (PQ)

Operate postage meter (OP:201) (CS)

Operate scanner (OP:202) (CS)

**Performance Element: Perform routine/daily office assignments to support others and/or to maintain smooth office operations.**

**Performance Indicators:**

Code and enter data (OP:347) (CS)

Open and distribute office mail/parcels (OP:348) (CS)

Update mail/telephone directories (OP:349) (CS)

Coordinate direct mailings (OP:350) (SP)

**Performance Element: Troubleshoot problems with office equipment to make repairs and/or to obtain technical support.**

**Performance Indicators:**

Isolate and identify source of technical problem (OP:203) (CS)

Follow manufacturer's written procedures to fix technical problem (OP:204) (CS)

Obtain technical support services (OP:205) (CS)

**Performance Element: Abide by risk-management policies and procedures for technology to minimize loss.**

**Performance Indicators:**

Adhere to technology safety and security policies (e.g., acceptable use policy, web page policies) (OP:206) (CS)

Apply ergonomic techniques to technology tasks (OP:207) (CS)

Adhere to laws pertaining to computer crime, fraud, and abuse (OP:208) (CS)

Follow procedures used to restart and recover from situations (e.g., system failure, virus infection) (OP:209) (CS)

Follow policies to prevent loss of data integrity (OP:210) (CS)

Adhere to organization's policies for technology use (OP:211) (CS)

**Performance Element: Maintain work flow to enhance productivity.**

**Performance Indicators:**

Assist with overflow work (OP:231) (CS)

Support staff with assigned project-based work (OP:351) (CS)

Chunk and sequence tasks for timely completion of job responsibilities (OP:352) (CS)\*

Solve information flow problems (OP:353) (SP)

Coordinate submission of proposals (OP:232) (SP)

Manage work from multiple bosses (OP:356) (SP)

## **Instructional Area: Professional Development (PD)**

**Standard: Understands concepts, tools, and strategies used to explore, obtain, and develop in a business career**

**Performance Element: Acquire self-development skills to enhance relationships and improve efficiency in the work environment.**

**Performance Indicators:**

Explain professional responsibilities in administrative services (PD:178) (CS)

Exhibit a professional image (PD:280) (CS)

Demonstrate effective organizational skills (PD:281) (CS)

Use advanced memory/recall methods (PD:282) (SP)

**Performance Element: Utilize critical-thinking skills to determine best options/outcomes.**

**Performance Indicators:**

Anticipate boss's needs (PD:283) (SP)

Confront difficult situations (PD:284) (SP)

**Performance Element: Participate in career planning to enhance job-success potential.**

**Performance Indicators:**

Explain career opportunities in administrative services (PD:183) (CS)

Describe certifications in administrative services (PD:184) (CS)

## **Instructional Area: Knowledge Management (KM)**

**Standard: Understands the systems, strategies, and techniques used to collect, organize, analyze, and share information known in an organization**

**Performance Element: Use knowledge management strategies to improve the performance and competitive advantage of an organization.**

**Performance Indicators:**

Take minutes of meetings (KM:008) (SP)

## Instructional Area: Financial Analysis (FI)

**Standard: Understands tools, strategies, and systems used to maintain, monitor, control, and plan the use of financial resources**

**Performance Element: Implement suitable internal accounting controls to ensure the proper recording of financial transactions.**

**Performance Indicators:**

Explain the purpose of internal accounting controls (FI:343) (SP)

## Instructional Area: Information Management (NF)

**Standard: Understands tools, strategies, and systems needed to access, process, maintain, evaluate, and disseminate information to assist business decision-making**

**Performance Element: Facilitate computer system operations to enhance usability.**

**Performance Indicators:**

Explain issues involved in designing systems for different environments (NF:136) (SP)

Explain usability engineering methods (NF:137) (SP)

Support and maintain a multimedia website (NF:138) (SP)

**Performance Element: Create and access databases to acquire information for business decision-making.**

**Performance Indicators:**

Build data in a data warehouse (NF:142) (SP)

Create a meaningful data set (NF:143) (SP)

Manipulate data in the database management system (NF:144) (SP)

Analyze company's data requirements (NF:145) (SP)

Design a database to meet business requirements (NF:146) (SP)

Identify database trends (NF:147) (SP)

**Performance Element: Apply data mining methods to acquire pertinent information for business decision-making.**

**Performance Indicators:**

Demonstrate advanced data mining techniques (NF:245) (SP)

Discuss challenges associated with data mining (NF:246) (SP)

Explain factors used to select the appropriate data mining technique (NF:247) (SP)

Explain factors used to establish data mining rules (NF:248) (SP)

Discuss the nature of mining unstructured data (NF:249) (SP)

**Performance Element: Utilize computer's operating system to manage and perform work responsibilities.**

**Performance Indicators:**

Move files in the computer operating system (NF:153) (CS)

Create directories (NF:154) (CS)

Maintain data files in appropriate format (i.e., preserve, convert, or migrate) (NF:251) (CS)

Utilize cloud computing applications (NF:252) (CS)

Implement version control (NF:253) (SP)

Explain the use of computer systems in problem solving (e.g., computer programs, scripts, algorithms, data structure) (NF:254) (SP)

Explain how programming techniques are to solve problems (e.g., paradigms, languages, attribute definition) (NF:255) (SP)

Explain methods of constructing programs (NF:256) (SP)

**Performance Element: Utilize technology to support business strategies and operations.**

**Performance Indicators:**

Explain methods used to develop the technological infrastructure (NF:155) (SP)

Explain the nature of enterprise-resource systems (NF:262) (SP)

Identify management information requirements (NF:156) (SP)

Evaluate data structures (NF:263) (SP)

**Performance Element: Apply statistical data analysis methods to aid in business data interpretation.**

**Performance Indicators:**

Select confidence levels (NF:228) (SP)

Test data for definitive relationships (NF:229) (SP)

Test data for definitive associations (NF:230) (SP)

Test data for meaningful differences (NF:231) (SP)

Use statistical data inferences to draw preliminary conclusions (NF:232) (SP)

Identify types of data analysis modeling techniques (NF:233) (SP)

Apply mathematical data analysis modeling techniques (NF:234) (SP)

Use data analysis software (NF:235) (SP)

**Performance Element: Interpret research data into information for business decision-making.**

**Performance Indicators:**

Explain the use of descriptive statistics in business decision making (NF:236) (SP)

Interpret descriptive statistics for business decision making (NF:237) (SP)

Interpret business data correlations (NF:238) (SP)

Draw conclusions on the research question/issue (NF:239) (SP)

**Performance Element: Acquire data to facilitate issue identification and analysis.****Performance Indicators:**

Describe methods of securely transmitting data (NF:243) (CS)

Formulate data validation strategies and methods (e.g., system edits, reports, audits) (NF:244) (CS)

**Performance Element: Develop code to aid in data interpretation.****Performance Indicators:**

Identify the scope of data (e.g., structured, unstructured, data types) (NF:257) (SP)

Explain Boolean logic (NF:258) (SP)

Write code that performs data analysis (e.g., mathematical operations, string operations, truth tables, operators, control structures, call functions) (NF:259) (SP)

Write code to access data repositories (NF:260) (SP)

Write code to create information categories for analysis (NF:261) (SP)

## **Instructional Area: Operations (OP)**

**Standard: Understands the processes and systems implemented to monitor, plan, and control the day-to-day activities required for continued business functioning****Performance Element: Develop an understanding of business analysis to improve business functions and activities.****Performance Indicators:**

Discuss the connection between business analysis and business process management (OP:328) (SP)

Explain types of requirements (e.g., business, system, functional, nonfunctional) (OP:329) (SP)

**Performance Element: Analyze business processes to improve business performance.****Performance Indicators:**

Document business processes (OP:457) (SP)

Identify the business process problem/issue (OP:458) (SP)

Define data needs and limitations (e.g., data fields, constraints, assumptions, variations expectations) (OP:459) (SP)

Identify data acquisition strategies (OP:460) (SP)

Plan the requirements for data analysis (OP:330) (SP)

Analyze business processes (e.g., measure efficiency, benchmark metrics) (OP:461) (SP)

Recommend improvements to business processes (OP:462) (SP)

**Performance Element: Implement suitable operational controls to achieve goals and minimize risk.**

**Performance Indicators:**

Explain the purpose of operational controls (OP:463) (SP)

## **Instructional Area: Professional Development (PD)**

**Standard: Understands concepts, tools, and strategies used to explore, obtain, and develop in a business career**

**Performance Element: Acquire self-development skills to enhance relationships and improve efficiency in the work environment.**

**Performance Indicators:**

Explain professional responsibilities in business information management (PD:180) (SP)

Discuss the role and responsibilities of project managers (PD:181) (SP)

Describe the role and responsibilities of business analysts (PD:182) (SP)

**Performance Element: Participate in career planning to enhance job-success potential.**

**Performance Indicators:**

Explain career opportunities in business information management (PD:185) (SP)

Describe certifications in business information management (PD:186) (SP)

Identify continuing education courses or program available to enhance business information management skills (PD:343) (SP)

Identify professional association opportunities in business information management (PD:344) (SP)

## **Instructional Area: Strategic Management (SM)**

**Standard: Understands tools, techniques, and systems that affect a business's ability to plan, control, and organize an organization/department**

**Performance Element: Coordinate information management and business management to aid in business planning.**

**Performance Indicators:**

Explain the strategic role of information systems/information communication technology within an organization (SM:037) (SP)

Describe requirements for aligning information technology and business strategy to leverage data as a strategic asset (SM:079) (SP)

## **Instructional Area: Knowledge Management (KM)**

**Standard: Understands the systems, strategies, and techniques used to collect, organize, analyze, and share information known in an organization**

**Performance Element: Use knowledge management strategies to improve the performance and competitive advantage of an organization.**

**Performance Indicators:**

Establish uniform definitions of data (KM:010) (SP)

Create a reference tool (data dictionary) (KM:011) (SP)

Explain enterprise search design principles (KM:012) (SP)

Analyze content management structures (e.g., taxonomies, metadata, retention) (KM:013) (SP)

Maintain knowledge management systems (KM:015) (SP)

Update knowledge management systems (KM:016) (SP)

## **Instructional Area: Quality Management (QM)**

**Standard: Understands the need for standards and the strategies and techniques used to implement, monitor, and evaluate them**

**Performance Element: Manage quality to achieve organizational objectives.**

**Performance Indicators:**

Discuss the implications of quality costs (QM:010) (SP)

Test product/service for quality (QM:004) (SP)

## **Instructional Area: Risk Management (RM)**

**Standard: Understands risk-management strategies and techniques used to minimize business loss**

**Performance Element: Manage risk to protect a business's well-being.**

**Performance Indicators:**

Discuss the nature of enterprise risk management (ERM) (RM:062) (SP)

## **Instructional Area: Business Law (BL)**

**Standard: Understands business's responsibility to know, abide by, and enforce laws and regulations that affect business operations and transactions**

**Performance Element: Apply knowledge of business contracts to establish business relationships.**

**Performance Indicators:**

Discuss the nature of contract suspensions (BL:084) (SP)

Explain the nature of contract terminations (BL:085) (SP)

**Performance Element: Understand government/legal activities that affect global trade to make business decisions.**

**Performance Indicators:**

Explain regulations restricting customer trade (e.g., OFAC, FCPA, anti-bribery) (BL:156) (SP)

Comply with export licensing regulations (BL:127) (SP)

Obtain releases and clearances to export products (BL:128) (SP)

**Performance Element: Develop a compliance program to protect the company wellbeing.**

**Performance Indicators:**

Explain the nature of a compliance program (BL:162) (SP)

## **Instructional Area: Communication Skills (CO)**

**Standard: Understands the concepts, strategies, and systems used to obtain and convey ideas and information**

**Performance Element: Write internal and external business correspondence to convey and obtain information effectively.**

**Performance Indicators:**

Repurpose content for social media (CO:210) (SP)

**Performance Element: Manage communications efforts to protect brand viability.**

**Performance Indicators:**

Explain the nature of communications plans (CO:195) (SP)

Implement a communications plan (CO:196) (SP)

Monitor communications plan (CO:197) (SP)

Develop communications plan (CO:198) (SP)

Adjust communications plan (CO:199) (SP)



## Instructional Area: Emotional Intelligence (EI)

**Standard: Understands techniques, strategies, and systems used to foster self-understanding and enhance relationships with others**

**Performance Element: Manage internal and external business relationships to foster positive interactions.**

**Performance Indicators:**

Explain the impact of business customs and practices on global trade (EI:082) (SP)

Describe the nature of business customs and practices in the North American market (EI:083) (SP)

Explain the nature of business customs and practices in Western Europe (EI:084) (SP)

Explain the nature of business customs and practices in Eastern Europe (EI:117) (SP)

Explain the nature of business customs and practices in Latin America (EI:085) (SP)

Describe the nature of business customs and practices in the Pacific Rim (EI:086) (SP)

Discuss the nature of business customs and practices in the Middle East (EI:087) (SP)

Explain the nature of business customs and practices in South Asia (EI:118) (SP)

Describe the nature of business customs and practices in Northern Africa (EI:119) (SP)

Discuss the nature of business customs and practices in Sub-Saharan Africa (EI:120) (SP)

## Instructional Area: Financial Analysis (FI)

**Standard: Understands tools, strategies, and systems used to maintain, monitor, control, and plan the use of financial resources**

**Performance Element: Understand the fundamentals of managerial accounting to aid in financial decision-making.**

**Performance Indicators:**

Explain the nature of managerial cost accounting (e.g., activities, costs, cost drivers, etc.) (FI:657) (SP)

Describe the scope of costs in managerial accounting (e.g., direct cost, indirect cost, sunk cost, differential cost, etc.) (FI:658) (SP)

Describe marginal analysis techniques and applications (FI:659) (SP)

Explain the role of managerial accounting techniques in business management (FI:660) (SP)

Discuss the use of variance analysis in managerial accounting (FI:661) (SP)

## **Instructional Area: Human Resources Management (HR)**

**Standard: Understands the tools, techniques, and systems that businesses use to plan, staff, lead, and organize its human resources**

**Performance Element: Build employer-employee relationships to foster productivity.**

**Performance Indicators:**

Foster employee engagement and commitment (HR:513) (SP)

**Performance Element: Understand staff issues/problems to enhance productivity and improve employee relationships.**

**Performance Indicators:**

Explain labor-relations issues (HR:452) (SP)

Discuss issues associated with workplace diversity (e.g., ethnic, generational, religious, gender) (HR:515) (SP)

## **Instructional Area: Operations (OP)**

**Standard: Understands the processes and systems implemented to monitor, plan, and control the day-to-day activities required for continued business functioning**

**Performance Element: Manage facilities to reduce costs and minimize social impact.**

**Performance Indicators:**

Explain the nature of facilities management (OP:466) (SP)

**Performance Element: Manage operational risks to protect a business's financial well-being.**

**Performance Indicators:**

Identify the factors that contribute to operational risk (e.g., insufficient training, lack of supervision, inadequate security, poor system design, poor HR policies) (OP:447) (SP)

Discuss the nature of operational risk management (OP:448) (SP)

## **Instructional Area: Professional Development (PD)**

**Standard: Understands concepts, tools, and strategies used to explore, obtain, and develop in a business career**

**Performance Element: Explore professional development opportunities to enhance management skills.**

**Performance Indicators:**

Identify continuing education courses or programs available to enhance management skills (PD:258) (SP)

Describe certifications for management professionals (e.g., American Management Association [AMA], American National Standards Institute [ANSI]) (PD:259) (SP)

Identify professional association opportunities for management professionals (e.g., educational opportunities, networking, conferences, newsletters, publications) (PD:260) (SP)

## **Instructional Area: Strategic Management (SM)**

**Standard: Understands tools, techniques, and systems that affect a business's ability to plan, control, and organize an organization/department**

**Performance Element: Implement corporate social responsibility to achieve business objectives.**

**Performance Indicators:**

Explain the nature of corporate social responsibility (SM:082) (SP)

Monitor compliance with corporate social responsibility policies (SM:083) (SP)

Measure corporate social responsibility impact (SM:084) (SP)

**Performance Element: Adapt to and manage change within an organization to accomplish organizational objectives.**

**Performance Indicators:**

Explain the relationship between organizational change and organizational development (SM:087) (SP)

Describe strategies and approaches for leading change (SM:088) (SP)

## **Instructional Area: Knowledge Management (KM)**

**Standard: Understands the systems, strategies, and techniques used to collect, organize, analyze, and share information known in an organization**

**Performance Element: Use knowledge management strategies to improve the performance and competitive advantage of an organization.**

**Performance Indicators:**

Identify ways to use crowdsourcing in business (KM:017) (SP)

## **Instructional Area: Quality Management (QM)**

**Standard: Understands the need for standards and the strategies and techniques used to implement, monitor, and evaluate them**

**Performance Element: Manage quality to achieve organizational objectives.**

**Performance Indicators:**

Describe product standards' issues associated with global business (QM:008) (SP)

## **Instructional Area: Risk Management (RM)**

**Standard: Understands risk-management strategies and techniques used to minimize business loss**

**Performance Element: Manage risk to protect a business's well-being.**

**Performance Indicators:**

Discuss the nature of global risk (RM:065) (SP)

Describe types of indicators used to manage business risk (e.g., key risk indicators, key performance indicators, key process indicators) (RM:088) (SP)

## **Instructional Area: Business Law (BL)**

**Standard: Understands business's responsibility to know, abide by, and enforce laws and regulations that affect business operations and transactions**

**Performance Element: Implement human-resources laws and regulations to ensure equitable treatment of employees and to meet government requirements.**

**Performance Indicators:**

Explain unfair labor practices (BL:119) (SP)

Comply with compensation and benefit laws (BL:120) (SP)

## **Instructional Area: Communication Skills (CO)**

**Standard: Understands the concepts, strategies, and systems used to obtain and convey ideas and information**

**Performance Element: Write internal and external business correspondence to convey and obtain information effectively.**

**Performance Indicators:**

Repurpose content for social media (CO:210) (SP)

**Performance Element: Communicate with staff to clarify workplace expectations and benefits.**

**Performance Indicators:**

Maintain confidentiality in dealing with personnel (CO:187) (SP)

Describe elements of a human resources management's communications program (CO:188) (SP)

## **Instructional Area: Human Resources Management (HR)**

**Standard: Understands the tools, techniques, and systems that businesses use to plan, staff, lead, and organize its human resources**

**Performance Element: Understand human resources management models to demonstrate knowledge of their nature and scope.**

**Performance Indicators:**

Explain human resources management functions (HR:413) (SP)

Discuss factors that impact human resources management (e.g., availability of qualified employees, alternative staffing methods, employment laws/regulations, company policies/procedures, compensation and benefit programs, staff diversity, etc.) (HR:415) (SP)

**Performance Element: Plan talent-acquisition activities to guide human resources management decision-making.**

**Performance Indicators:**

Describe planning techniques used in the hiring process (e.g., succession planning, forecasting, etc.) (HR:416) (SP)

**Performance Element: Implement talent-acquisition activities to obtain qualified staff.**

**Performance Indicators:**

Explain assessment methods used in the hiring process (HR:522) (SP)

Explain contingency factors affecting job offer (e.g., background checks, drug tests, physical results, etc.) (HR:426) (SP)

Track job applicants (HR:523) (SP)

Administer and interpret employee selection tests (HR:423) (SP)

**Performance Element: Conduct on-boarding activities to facilitate employee start-up.**

**Performance Indicators:**

Perform post-employment offer activities (HR:431) (SP)

Explain the use of employment contracts (HR:432) (SP)

Explain standard relocation practices (HR:433) (SP)

Assist with employee relocation (HR:434) (SP)

Describe expatriation and repatriation issues and practices (HR:435) (SP)

**Performance Element: Determine employee-development needs to foster staff's growth and professional development.**

**Performance Indicators:**

Assess employee skills (HR:438) (SP)

Conduct task/process analysis (HR:439) (SP)

Conduct gap and/or needs analysis to identify human-resources development needs (HR:443) (SP)

Assess company's learning needs (HR:440) (SP)

**Performance Element: Perform talent-development activities.****Performance Indicators:**

Determine learning objectives (HR:527) (SP)

Choose learning methods (HR:528) (SP)

Write training activities (HR:441) (SP)

Prepare a training plan (HR:529) (SP)

Design a learning module (HR:530) (SP)

Select experts for employee development (HR:442) (SP)\*

Facilitate employee learning (HR:531) (SP)

Evaluate learning (HR:532) (SP)

Determine issues impacting human-resources development (e.g., organizational culture and policies, societal norms, etc.) (HR:444) (SP)

Apply human-resources development theories (HR:445) (SP)

Implement employee-development program (HR:446) (SP)

**Performance Element: Control human resources management activities to maintain workforce standards.****Performance Indicators:**

Assist with establishment of work rules (HR:460) (SP)

**Performance Element: Build employer-employee relationships to foster productivity.****Performance Indicators:**

Describe ways that businesses build positive employer-employee relationships (HR:449) (SP)

Foster employee engagement and commitment (HR:513) (SP)

**Performance Element: Assess employer-employee relationships to foster productivity.****Performance Indicators:**

Assess effectiveness of employee-relations activities (HR:450) (SP)

**Performance Element: Understand staff issues/problems to enhance productivity and improve employee relationships.****Performance Indicators:**

Explain labor-relations issues (HR:452) (SP)

Describe talent management issues associated with organizational changes (e.g., right-sizing, downsizing, talent relocation, organizational restructuring or redesign) (HR:543) (SP)

Discuss issues associated with workplace diversity (e.g., ethnic, generational, religious, gender) (HR:515) (SP)

Describe out-placement procedures and activities used in layoffs (HR:453) (SP)

**Performance Element: Resolve staff issues/problems to enhance productivity and improve employee relationships.**

**Performance Indicators:**

Document employee issues (e.g., reasonable suspicion, harassment, attendance) and recommend solutions (HR:454) (SP)

**Performance Element: Understand total reward strategies.**

**Performance Indicators:**

Explain the nature of benefit plans (e.g., health insurance, life insurance, educational assistance, health club membership, etc.) (HR:475) (SP)

Explain the nature of fitness/wellness programs offered by businesses (HR:482) (SP)

Explain the nature of retirement plans (HR:476) (SP)

Explain components of total rewards system (HR:467) (SP)

Discuss the nature of executive compensation (HR:469) (SP)

Explain payroll functions (HR:465) (SP)

**Performance Element: Administer total reward strategies.**

**Performance Indicators:**

Manage flexible work arrangements (HR:547) (SP)

Administer leave management procedures (HR:548) (SP)

Administer employee fitness/wellness programs (HR:549) (SP)

Arrange pension/retirement benefits for employees (HR:550) (SP)

**Performance Element: Analyze total rewards strategies to meet employee expectations and to remain competitive with other employers.**

**Performance Indicators:**

Identify emerging compensation issues (HR:472) (SP)

Explain methods that can be used to analyze total rewards programs (HR:480) (SP)

Benchmark total rewards practices by successful organizations (HR:552) (SP)

Conduct benefits need assessment (HR:477) (SP)

Assess company's employee fitness/wellness program (HR:483) (SP)

**Performance Element: Develop and assess company's health and safety programs to ensure compliance and protect employees.**

**Performance Indicators:**

Evaluate effectiveness of company's injury/occupational illness prevention programs (HR:485) (SP)



**Performance Element: Contribute to organizational development to change the beliefs, attitudes, values, and structure of organizations so that they can better adapt to new technologies, markets, and challenges.**

**Performance Indicators:**

Explain the nature of organizational development (HR:487) (SP)

## **Instructional Area: Information Management (NF)**

**Standard: Understands tools, strategies, and systems needed to access, process, maintain, evaluate, and disseminate information to assist business decision-making**

**Performance Element: Maintain business records to facilitate business operations.**

**Performance Indicators:**

Verify new hire's employment eligibility (NF:269) (SP)

Process immigration-related records (NF:270) (SP)

Administer worker's compensation claim (NF:271) (SP)

Process OSHA documentation (NF:272) (SP)

Complete new hire documentation and reporting (NF:273) (SP)

**Performance Element: Acquire information to guide business decision-making.**

**Performance Indicators:**

Explain trends in human resources management (NF:275) (SP)

Determine turnover rate and its causes (NF:276) (SP)

Identify and report factors negatively impacting productivity (NF:277) (SP)

**Performance Element: Utilize a human resource information system to increase organizational efficiency.**

**Performance Indicators:**

Explain the nature of a human resource information system (HRIS) (NF:159) (SP)

Capture and store data in a human resource information system (HRIS) (NF:160) (SP)

Mine data in human resource information system (NF:161) (SP)

**Performance Element: Utilize a learning management system to increase organizational efficiency.**

**Performance Indicators:**

Explain the nature of a learning management system (LMS) (NF:265) (SP)

Capture and store data in a learning management system (LMS) (NF:266) (SP)

Mine data in learning management systems (NF:267) (SP)

## Instructional Area: Operations (OP)

**Standard: Understands the processes and systems implemented to monitor, plan, and control the day-to-day activities required for continued business functioning**

**Performance Element: Understand health and safety issues to support a safe work environment.**

**Performance Indicators:**

Describe general health and safety practices monitored and assessed by human resources management (OP:212) (SP)

Discuss the nature of incident and emergency response plans (OP:213) (SP)

Describe the nature of employee-assistance programs (OP:214) (SP)

**Performance Element: Troubleshoot health and safety problems to foster a safe work environment.**

**Performance Indicators:**

Conduct an accident investigation (OP:481) (SP)

Identify potential workplace violence conditions (OP:223) (SP)

Monitor drug and alcohol testing (OP:482) (SP)

**Performance Element: Develop and analyze human-resources programs, practices, and services that promote the physical and mental well-being of individuals in the workplace to protect individuals and the workplace.**

**Performance Indicators:**

Identify opportunities to “green” the workplace (OP:483) (SP)

Recommend an emergency response plan (OP:317) (SP)

Recommend an incidence response plan (OP:318) (SP)

Recommend a security plan for a business (OP:320) (SP)

## Instructional Area: Professional Development (PD)

**Standard: Understands concepts, tools, and strategies used to explore, obtain, and develop in a business career**

**Performance Element: Participate in career planning to enhance job-success potential.**

**Performance Indicators:**

Explain career opportunities in human resources management (PD:187) (SP)

Describe certifications for human resources-management professionals (e.g., Professional in Human Resources [PHR], Senior Professional in Human Resources [SPHR], Global Professional in Human Resources [GPHR], etc.) (PD:188) (SP)

**Performance Element: Explore professional development opportunities to enhance skills needed in human resources management.**

**Performance Indicators:**

Identify continuing education courses or programs available to enhance human resources management skills (PD:263) (SP)

Identify professional association opportunities for human resources management professionals (e.g., educational opportunities, networking, conferences, newsletters, publications) (PD:264) (SP)

## **Instructional Area: Strategic Management (SM)**

**Standard: Understands tools, techniques, and systems that affect a business's ability to plan, control, and organize an organization/department**

**Performance Element: Implement strategic-planning processes to guide human-resources-management decision-making.**

**Performance Indicators:**

Explain how human resources management participates in a company's strategic planning process (SM:050) (SP)

Describe the impact of organizational factors on human-resource management strategies (e.g., global business strategy, organizational structure, organizational culture) (SM:097) (SP)

## **Instructional Area: Knowledge Management (KM)**

**Standard: Understands the systems, strategies, and techniques used to collect, organize, analyze, and share information known in an organization**

**Performance Element: Use knowledge management strategies to improve the performance and competitive advantage of an organization.**

**Performance Indicators:**

Identify ways to use crowdsourcing in business (KM:017) (SP)

## **Instructional Area: Business Law (BL)**

**Standard: Understands business's responsibility to know, abide by, and enforce laws and regulations that affect business operations and transactions**

**Performance Element: Apply knowledge of business contracts to establish business relationships.**

**Performance Indicators:**

Discuss the nature of contract suspensions (BL:084) (SP)

Explain the nature of contract terminations (BL:085) (SP)

**Performance Element: Understand laws regulating the vendor/supplier bidding process to facilitate business operations.**

**Performance Indicators:**

Discuss regulations that affect the vendor/supplier bidding process (BL:125) (SP)

**Performance Element: Develop a compliance program to protect the company wellbeing.**

**Performance Indicators:**

Explain the nature of a compliance program (BL:162) (SP)

## **Instructional Area: Communication Skills (CO)**

**Standard: Understands the concepts, strategies, and systems used to obtain and convey ideas and information**

**Performance Element: Write internal and external business correspondence to convey and obtain information effectively.**

**Performance Indicators:**

Repurpose content for social media (CO:210) (SP)

## **Instructional Area: Customer Relations (CR)**

**Standard: Understands the techniques and strategies used to foster positive, ongoing relationships with customers**

**Performance Element: Foster positive relationships with customers to enhance sales.**

**Performance Indicators:**

Process customer orders (CR:021) (CS)

Use social media to enhance customer post-sales experience (CR:028) (SP)\*

Explain the relationship between customer services and sales (CR:027) (CS)

Process customer returns (CR:022) (CS)

## Instructional Area: Emotional Intelligence (EI)

**Standard: Understands techniques, strategies, and systems used to foster self-understanding and enhance relationships with others**

**Performance Element: Manage internal and external business relationships to foster positive interactions.**

**Performance Indicators:**

Explain the impact of business customs and practices on global trade (EI:082) (SP)

Describe the nature of business customs and practices in the North American market (EI:083) (SP)

Explain the nature of business customs and practices in Western Europe (EI:084) (SP)

Explain the nature of business customs and practices in Eastern Europe (EI:117) (SP)

Explain the nature of business customs and practices in Latin America (EI:085) (SP)

Describe the nature of business customs and practices in the Pacific Rim (EI:086) (SP)

Discuss the nature of business customs and practices in the Middle East (EI:087) (SP)

Explain the nature of business customs and practices in South Asia (EI:118) (SP)

Describe the nature of business customs and practices in Northern Africa (EI:119) (SP)

Discuss the nature of business customs and practices in Sub-Saharan Africa (EI:120) (SP)

## Instructional Area: Financial Analysis (FI)

**Standard: Understands tools, strategies, and systems used to maintain, monitor, control, and plan the use of financial resources**

**Performance Element: Understand the fundamentals of managerial accounting to aid in financial decision-making.**

**Performance Indicators:**

Explain the nature of managerial cost accounting (e.g., activities, costs, cost drivers, etc.) (FI:657) (SP)

Describe the scope of costs in managerial accounting (e.g., direct cost, indirect cost, sunk cost, differential cost, etc.) (FI:658) (SP)

Describe marginal analysis techniques and applications (FI:659) (SP)

Explain the role of managerial accounting techniques in business management (FI:660) (SP)

Discuss the use of variance analysis in managerial accounting (FI:661) (SP)

**Performance Element: Implement suitable internal accounting controls to ensure the proper recording of financial transactions.**

**Performance Indicators:**

Explain the purpose of internal accounting controls (FI:343) (SP)

Determine the components of internal accounting control procedures for a business (FI:479) (SP)

Maintain internal accounting controls (FI:480) (SP)

**Performance Element: Utilize cost accounting methods to guide business decision-making.**

**Performance Indicators:**

Discuss the relationship between operations management and accounting (FI:416) (SP)

Describe the nature of cost accounting decision making (FI:417) (SP)

Explain the nature of job costing (FI:418) (SP)

Describe the nature of activity-based costing (FI:419) (SP)

## **Instructional Area: Information Management (NF)**

**Standard: Understands tools, strategies, and systems needed to access, process, maintain, evaluate, and disseminate information to assist business decision-making**

**Performance Element: Acquire information to guide business decision-making.**

**Performance Indicators:**

Use analytical software (e.g., SPSS, SAS, Excel, etc.) (NF:214) (SP)

**Performance Element: Explain the role of technology to process and track customer orders.**

**Performance Indicators:**

Describe the impact of technology on order processing (NF:118) (CS)

Explain the nature of universal product code (UPC) barcoding (NF:119) (SP)

Explain the nature of radio frequency identification (RFID) tags (NF:120) (SP)

## **Instructional Area: Operations (OP)**

**Standard: Understands the processes and systems implemented to monitor, plan, and control the day-to-day activities required for continued business functioning**

**Performance Element: Develop an understanding of business analysis to improve business functions and activities.**

**Performance Indicators:**

Discuss the connection between business analysis and business process management (OP:328) (SP)

Explain types of requirements (e.g., business, system, functional, nonfunctional) (OP:329) (SP)

**Performance Element: Maintain property and equipment to facilitate ongoing business activities.**

**Performance Indicators:**

Identify routine activities for maintaining business facilities and equipment (OP:032) (SP)

Conduct safety inspections (OP:490) (SP)

Monitor and evaluate maintenance program (OP:491) (SP)

**Performance Element: Manage purchasing activities to obtain the best service/product at the least cost.**

**Performance Indicators:**

Coordinate corporate purchasing activities (OP:487) (SP)

**Performance Element: Understand purchasing activities to obtain business materials and services.**

**Performance Indicators:**

Describe the role of solicitations used in the purchasing process (OP:244) (SP)

Discuss the impact of vendor competition on purchasing (OP:245) (SP)

Discuss the nature of purchasing methods (OP:248) (SP)

Describe business objectives/strategies that influence purchasing (OP:249) (SP)

Describe the relationship between purchasing and operations management activities (e.g., strategic sourcing, sustainability, supply chain management) (OP:486) (SP)

**Performance Element: Acquire knowledge of organizational requirements to properly handle purchase activity.**

**Performance Indicators:**

Discuss organizational requirements for purchase authorizations (OP:251) (SP)

Discuss priority procedures used by businesses for purchases (OP:252) (SP)

**Performance Element: Understand inventory management methods to maintain appropriate levels of stock/supplies.**

**Performance Indicators:**

Describe strategies to minimize the cost of maintaining inventory (OP:489) (SP)

**Performance Element: Conduct supply chain management activities to coordinate the movement of materials, information, and funds into an organization and the movement of finished products/services out of an organization.**

**Performance Indicators:**

Explain the nature of order cycle time (OP:299) (SP)

Describe the nature of inter-organizational supply chains (OP:301) (SP)

Describe the relationship between supply chain management and operations management (OP:304) (SP)

Describe supply-chain management strategies (OP:305) (SP)  
Use supply chain measures to evaluate achievement of goals (OP:498) (SP)  
Evaluate risk factors and trends affecting supply chain systems (e.g., sustainability, political volatility) (OP:499) (SP)  
Identify supply chain process improvement opportunities (OP:500) (SP)  
Evaluate supplier performance and compliance (OP:501) (SP)  
Implement supply chain management strategies (OP:306) (SP)

**Performance Element: Adjust the work capacity of an organization to meet predicted demands.**

**Performance Indicators:**

Discuss the nature of capacity planning (OP:313) (SP)  
Describe factors impacting demand (OP:314) (SP)

**Performance Element: Acquire foundational knowledge of distribution to understand its role and function.**

**Performance Indicators:**

Explain the nature and scope of distribution (OP:522) (CS)\*  
Explain the relationship between customer service and distribution (OP:523) (CS)\*  
Describe the use of technology in distribution (OP:524) (SP)\*  
Explain legal considerations in distribution (OP:525) (SP)\*  
Describe ethical considerations in distribution (OP:526) (SP)\*

**Performance Element: Utilize order-fulfillment processes to move product through the supply chain.**

**Performance Indicators:**

Use an information system for order fulfillment (OP:380) (CS)  
Fulfill orders (OP:381) (CS)

**Performance Element: Implement receiving processes to ensure accuracy and quality of incoming shipments.**

**Performance Indicators:**

Explain the receiving process (OP:384) (CS)  
Explain stock-handling techniques used in receiving deliveries (OP:385) (CS)  
Process incoming merchandise (OP:386) (CS)  
Resolve problems with incoming shipments (OP:387) (CS)



**Performance Element: Utilize stock-handling procedures to process incoming inventory.****Performance Indicators:**

- Attach source and anti-theft tags (OP:389) (CS)
- Maintain evidence of material sources (OP:485) (CS)
- Process returned/damaged product (OP:396) (CS)
- Transfer stock to/from branches (OP:397) (SP)

**Performance Element: Utilize warehousing procedures to store inventory until needed.****Performance Indicators:**

- Explain storing considerations (OP:400) (CS)
- Explain the nature of warehousing (OP:401) (CS)
- Store inventory (OP:402) (CS)

**Performance Element: Understand transportation processes to move products through the supply chain.****Performance Indicators:**

- Explain shipping processes (OP:405) (CS)
- Identify factors considered when selecting best shipping method (OP:406) (SP)

**Performance Element: Utilize inventory-control methods to minimize costs and to meet customer demand.****Performance Indicators:**

- Describe inventory control systems (OP:413) (CS)
- Explain types of unit inventory-control systems (OP:414) (SP)
- Determine inventory shrinkage (OP:415) (SP)
- Maintain inventory-control systems (OP:416) (SP)

**Performance Element: Manage facilities to reduce costs and minimize social impact.****Performance Indicators:**

- Explain the nature of facilities management (OP:466) (SP)
- Identify waste management opportunities (OP:494) (SP)
- Identify sustainability opportunities (OP:495) (SP)

**Performance Element: Manage operational risks to protect a business's financial well-being.****Performance Indicators:**

- Identify the factors that contribute to operational risk (e.g., insufficient training, lack of supervision, inadequate security, poor system design, poor HR policies) (OP:447) (SP)
- Discuss the nature of operational risk management (OP:448) (SP)

**Performance Element: Analyze business processes to improve business performance.****Performance Indicators:**

Document business processes (OP:457) (SP)

Identify the business process problem/issue (OP:458) (SP)

Define data needs and limitations (e.g., data fields, constraints, assumptions, variations expectations) (OP:459) (SP)

Identify data acquisition strategies (OP:460) (SP)

Plan the requirements for data analysis (OP:330) (SP)

Analyze business processes (e.g., measure efficiency, benchmark metrics) (OP:461) (SP)

Recommend improvements to business processes (OP:462) (SP)

**Performance Element: Implement suitable operational controls to achieve goals and minimize risk.****Performance Indicators:**

Explain the purpose of operational controls (OP:463) (SP)

**Performance Element: Assess product packaging to improve supply chain****Performance Indicators:**

Assess the impact of product packaging requirements on logistics (OP:502) (SP)

Review product packaging to improve supply chain efficiency (OP:503) (SP)

**Performance Element: Evaluate transportation strategies to improve the performance and competitive advantage of the organization.****Performance Indicators:**

Describe the transportation modes (OP:505) (SP)

Explain the scope of domestic and global transport systems (OP:506) (SP)

Explain the impact of transportation costs on business performance (e.g., cost elements) (OP:507) (SP)

Describe trends in international distribution systems (OP:508) (SP)

Describe the nature of channel intermediaries for foreign markets (e.g., distributors, agents) (OP:509) (SP)

Explain international transportation and delivery system elements (OP:510) (SP)

Develop transportation plans (OP:511) (SP)

Assess transportation processes (OP:512) (SP)

Describe the nature and scope of reverse logistics (OP:513) (SP)

Explain the impact of import and export requirements on supply chain design (e.g., documentation requirements, handling requirements) (OP:514) (SP)

## Instructional Area: Professional Development (PD)

**Standard: Understands concepts, tools, and strategies used to explore, obtain, and develop in a business career**

**Performance Element: Participate in career planning to enhance job-success potential.**

**Performance Indicators:**

Explain career opportunities in operations and supply chain management (PD:189) (SP)

Describe certifications for operations-management professionals (PD:190) (SP)

Describe certifications for supply chain management professionals (PD:345) (SP)

**Performance Element: Explore professional development opportunities to enhance operations-management skills.**

**Performance Indicators:**

Identify continuing education courses or programs available to enhance operations- and supply chain management skills (PD:266) (SP)

Identify professional association opportunities for operations- and supply chain management professionals (e.g., educational opportunities, networking, conferences, newsletters, publications) (PD:267) (SP)

Utilize operations- and supply chain management publications (e.g., books, periodicals, newsletters) to update skills (PD:268) (SP)

## Instructional Area: Knowledge Management (KM)

**Standard: Understands the systems, strategies, and techniques used to collect, organize, analyze, and share information known in an organization**

**Performance Element: Use knowledge management strategies to improve the performance and competitive advantage of an organization.**

**Performance Indicators:**

Identify ways to use crowdsourcing in business (KM:017) (SP)

**Performance Element: Evaluate knowledge management strategies to improve the performance and competitive advantage of the organization.**

**Performance Indicators:**

Describe the relationship among knowledge management, innovation, and talent development (KM:020) (SP)

Discuss the nature of records management (KM:021) (SP)

## **Instructional Area: Innovation Management (VM)**

**Standard: Understand the strategies and techniques used in marketplace innovation.**

**Performance Element: Understand the use of innovation to gain competitive advantage in the marketplace.**

**Performance Indicators:**

Discuss the nature of product development (VM:001) (SP)

Describe the relationship between innovation and product development (VM:002) (SP)

**Performance Element: Acquire a foundational knowledge of product design and development to understand its nature and scope.**

**Performance Indicators:**

Describe methods for recognizing opportunities for innovation (VM:004) (SP)

Identify the impact of product life cycles on operating decisions (VM:006) (SP)

Describe the use of technology in product-development management (VM:007) (SP)

Explain business ethics in product-development management (VM:008) (SP)

**Performance Element: Use innovation to contribute to ongoing business success.**

**Performance Indicators:**

Identify opportunities for innovation (VM:009) (SP)

## **Instructional Area: Quality Management (QM)**

**Standard: Understands the need for standards and the strategies and techniques used to implement, monitor, and evaluate them**

**Performance Element: Manage quality to achieve organizational objectives.**

**Performance Indicators:**

Describe product standards' issues associated with global business (QM:008) (SP)

Discuss the implications of quality costs (QM:010) (SP)

Analyze materials and products to achieve quality goals (QM:009) (SP)

Test product/service for quality (QM:004) (SP)

## **Instructional Area: Risk Management (RM)**

**Standard: Understands risk-management strategies and techniques used to minimize business loss**

**Performance Element: Administer contracts to achieve organizational goals and minimize risk.**

**Performance Indicators:**

Monitor for breach of contract of non-performance related terms and conditions (RM:078) (SP)

Identify operational risk factors associated with business contracts (RM:096) (SP)

Develop monitoring programs for restrictive contract requirements (RM:082) (SP)

**Performance Element: Manage risk to protect a business's well-being.**

**Performance Indicators:**

Discuss the nature of global risk (RM:065) (SP)

Describe types of indicators used to manage business risk (e.g., key risk indicators, key performance indicators, key process indicators) (RM:088) (SP)

Monitor third-party relationships for potential risk (RM:066) (SP)

Discuss the nature of enterprise risk management (ERM) (RM:062) (SP)