Career Field	Business and Administrative Services, Finance and Marketing	
Course Name	Office Management	
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Outcome	**1.1**	**Employability Skills:** Develop career awareness and employability skills (e.g., face-to-face, online) needed for gaining and maintaining employment in diverse business settings.
Competencies	1.1.2	Identify the scope of career opportunities and the requirements for education, training, certification, licensure and experience.
	1.1.4	Describe the role and function of professional organizations, industry associations and organized labor and use networking techniques to develop and maintain professional relationships.
	1.1.7	Apply problem-solving and critical-thinking skills to work-related issues when making decisions and formulating solutions.
	1.1.8	Identify the correlation between emotions, behavior and appearance and manage those to establish and maintain professionalism.
	1.1.9	Give and receive constructive feedback to improve work habits.
	1.1.10	Adapt personal coping skills to adjust to taxing workplace demands.

Outcome	**1.2**	**Leadership and Communications:** Process, maintain, evaluate and disseminate information in a business. Develop leadership and team building to promote collaboration.
Competencies	1.2.3	Identify and use verbal, nonverbal, and active listening skills to communicate effectively.
	1.2.4	Use negotiation and conflict-resolution skills to reach solutions.
	1.2.5	Communicate information (e.g., directions, ideas, vision, workplace expectations) for an intended audience and purpose.
	1.2.7	Use problem-solving and consensus-building techniques to draw conclusions and determine next steps.
	1.2.9	Identify advantages and disadvantages involving digital and/or electronic communications (e.g., common content for large audience, control of tone, speed, cost, lack of non-verbal cues, potential for forwarding information, longevity).
	1.2.11	Write professional correspondence, documents, job applications and resumés.
	1.2.12	Use technical writing skills to complete forms and create reports.
	1.2.13	Identify stakeholders and solicit their opinions.

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Outcome	**1.3**	**Business Ethics and Law:** Analyze how professional, ethical, and legal behavior contributes to continuous improvement in organizational performance and regulatory compliance.
Competencies	1.3.3	Use ethical character traits consistent with workplace standards (e.g., honesty, personal integrity, compassion, justice).
	1.3.8	Verify compliance with computer and intellectual property laws and regulations.

Outcome	**1.4**	**Knowledge Management and Information Technology:** Demonstrate current and emerging strategies and technologies used to collect, analyze, record and share information in business operations.
Competencies	1.4.1	Use office equipment to communicate (e.g., phone, radio equipment, fax machine, scanner, public address systems).
	1.4.2	Select and use software applications to locate, record, analyze and present information (e.g., word processing, e-mail, spreadsheet, databases, presentation, Internet search engines).
	1.4.3	Verify compliance with security rules, regulations and codes (e.g., property, privacy, access, accuracy issues, client and patient record confidentiality) pertaining to technology specific to industry pathway.
	1.4.4	Use system hardware to support software applications.
	1.4.5	Use information technology tools to maintain, secure and monitor business records.
	1.4.6	Use an electronic database to access and create business and technical information.
	1.4.7	Use personal information management and productivity applications to optimize assigned tasks (e.g., lists, calendars, address books).
	1.4.8	Use electronic media to communicate and follow network etiquette guidelines.

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Outcome	**1.5**	**Global Environment:** Evaluate how beliefs, values, attitudes and behaviors influence organizational strategies and goals.
Competencies	1.5.3	Use cultural intelligence to interact with individuals from diverse cultural settings.
	1.5.4	Recognize barriers in cross-cultural relationships and implement behavioral adjustments.

Outcome	**1.8**	**Operations Management:** Plan, organize and monitor an organization or department to maximize contribution to organizational goals and objectives.
Competencies	1.8.3.	Analyze the performance of organizational activities and reallocate resources to achieve established goals.
	1.8.4.	Identify alternative actions to take when goals are not met (e.g., changing goals, changing strategies, efficiencies).

Outcome	**1.10**	**Sales and Marketing:** Manage pricing, place, promotion, packaging, positioning and public relations to improve quality customer service.
Competencies	1.10.2.	Determine the customer's/client's needs and identify solutions and potential community resources.

Outcome	**3.1**	**Customer Relations:** Apply techniques, strategies and tools to develop, maintain and grow positive internal and external customer, or client, relationships.
Competencies	3.1.1	Explain the nature of positive customer or client relations and their role in keeping customers, and describe the importance of meeting and exceeding customer expectations.
	3.1.2	Compare the cost to acquire customers with the cost to maintain customers, and explain how these costs impact business strategy and influence which customers to maintain.
	3.1.3	Apply a customer-service mindset in a culturally appropriate manner (e.g., respond to customer inquiries; reinforce service through effective, ongoing communication).

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	3.1.4	Build rapport with customers and use this rapport to inform customers about company policies, consequences of noncompliance with recommendations or requirements and service or account terminations.
	3.1.5	Maintain confidentiality or privacy of internal and external customers.
	3.1.6	Reinforce company's image and culture to exhibit the business's brand promise.
	3.1.7	Describe the scope of customer-relationship management to show its contribution to business.
	3.1.8	Build, maintain and improve relationships with customers, or clients; and promote brand and solicit new ideas and solutions using social media.
	3.1.9	Identify opportunities to use crowdsourcing to engage customers or clients, to improve customer or client relationships, to promote brand and to solicit new ideas and solutions.
	3.1.10	Confer with patients about their rights and responsibilities as stated in the Patient Bill of Rights, the legal ownership of medical records, advanced directives and informed consent.

Outcome	**3.2**	**Relationship Management:** Apply techniques and strategies to develop, maintain and grow positive relationships with employees, peers and stakeholders.
Competencies	3.2.6	Determine the nature of office politics, and overcome problems and difficulties associated with office politics and turf wars.
	3.2.7	Identify when and how to take risks to achieve objectives.
	3.2.8	Describe the nature of organizational culture and its impact on business, and interpret and adapt to a business's culture.
	3.2.9	Establish strategic relationships with others.
	3.2.10	Share best practices with key individuals and groups within and outside the business.
	3.2.11	Manage internal and external business relationships to foster positive interactions, and strategically plan and leverage business relationships for growth.
	3.2.12	Describe ways that businesses build positive employer-employee relationships.

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Outcome	**3.3**	**Business Communications Management:** Apply strategies and procedures to plan, create, implement, and evaluate internal and external company communications.
Competencies	3.3.1	Identify organizational communication hierarchies, and select the appropriate communication strategy to use for the hierarchy.
	3.3.2	Explain how the content of written communications (e.g., email, text messages, chats) creates reputational, legal and regulatory exposure for organizations, and describe how to manage the risk individually and collectively.
	3.3.7	Develop, implement, monitor and adjust communications plan to meet the information needs of internal and external customers.
	3.3.8	Collaborate on and aggregate complex internal documents to create a common voice that is vision, mission and brand-consistent.

Outcome	**4.3**	**Compliance:** Develop compliance systems, processes and procedures used to manage compliance risk across an organization.
Competencies	4.3.6	Analyze existing policies, procedures and documents to ascertain compliance with regulatory requirements (e.g., Centers for Medicare and Medicaid Services [CMS], Health Insurance Portability and Accountability Act [HIPAA]) and self-regulatory guidelines.
	4.3.7	Monitor compliance with organizational or departmental compliance policies and procedures (e.g., continuing education requirements, prevention of fraudulent practices, record falsification or alteration, patient or customer abuse, lack of follow-up).
	4.3.8	Identify strategies for managing professional liability and malpractice risks (e.g., incompetent or impaired physicians, unnecessary procedures, patient or customer misconduct, service or medical errors, lack of training, poor documentation).

Outcome	**5.9**	**Marketing Communications:** Apply the concepts and determine the strategies needed to communicate information about products, services, images or ideas to achieve desired outcomes that support organizational goals and objectives.
Competencies	5.9.6	Implement word-of-mouth strategies to build brand and to promote products using word-of-mouth strategies.

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Outcome	**6.2**	**Information Management:** Institute and evaluate information management tools, policies, procedures and strategies to achieve business unit and organizational goals.
Competencies	6.2.2	Manage business records to maintain needed documentation (e.g., routing orders, tracking shipments, expense reports, healthcare data, customer data, budget data, quality data, human resources data).
	6.2.3	Monitor and audit internal records.
	6.2.4	Identify critical artifacts requiring preservation, establish retention guidelines, and archive information according to retention systems and procedures and regulatory requirements.
	6.2.5	Select and use tools, systems, and processes to manage the preparation of documentation for teams and projects in a cost-effective manner (e.g., agendas, reports, minutes, training materials, RFPs [Requests for Proposal], process analysis charts and diagrams).
	6.2.6	Perform scheduling functions to facilitate on-time, prompt completion of work activities (e.g., calendars, travel arrangements and itineraries, meeting arrangements and requests for audio-visual or technical support and information).
	6.2.10	Identify strategies for integrating technology into department or enterprise operations.

Outcome	**6.3**	**Business Applications:** Apply tools, processes and procedures to manage the efficient and effective use of technology to achieve organizational goals.
Competencies	6.3.2	Mine standard databases (e.g., accounting, customer, product, vendor, sales, operations, human resources, patient, supplier, procurement), apply analytical tools, and interpret the findings.
	6.3.3	Implement collaborative or groupware and cloud computing applications (e.g., services, application, virtual environments) to facilitate projects and business operations.
	6.3.5	Research and incorporate visual, interactive and social media content into business communications.
	6.3.7	Maintain a multimedia website, and test and post website design changes.

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Outcome	**6.4**	**Knowledge Management:** Apply systems, strategies and practices to share, organize, store, analyze and facilitate the use of a business's insights, processes, procedures and experiences as a strategic asset.
Competencies	6.4.3	Select and implement offline tools and techniques to gather, document and organize the knowledge residing with employees across the organization (e.g., relational networks, brainstorming, learning and idea capture, peer assist, learning reviews, storytelling, collaborative physical workspace, knowledge cafés, communities of practice).
	6.4.4	Select and apply online networks and tools to disseminate knowledge and effective practices (e.g., document libraries, Wikis, blogs, social networking sites or services, knowledge clusters, expert locators, collaborative virtual workspaces, interfaces).

Outcome	**6.6**	**Talent Acquisition:** Apply policies, procedures, and strategies to obtain the best qualified candidates for job positions in union and non-union environments while minimizing associated costs.
Competencies	6.6.5	Write and post job announcements for job openings.
	6.6.6	Screen and interview job applicants using culturally appropriate techniques.

Outcome	**6.7**	**Talent Onboarding and Development:** Apply strategies, policies and procedures to orient new hires and provide growth opportunities to engage new and existing union and non-union employees in the workplace.
Competencies	6.7.2	Conduct human resources onboarding activities (e.g., employment eligibility verification [I-9 form], tax paperwork, contracts, benefit plans, policy orientation).
	6.7.3	Orient talent to organizational culture, values and norms using appropriate techniques (e.g., coaching or mentoring, cross-departmental networking, toolkits, training).

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Outcome	**6.10**	**Human Resources Operations:** Develop, implement and evaluate the day-to-day policies, procedures and activities that are used to ensure efficient, effective human-resources management.
Competencies	6.10.2	Process human-resource compliance paperwork, and complete required reporting (e.g., workers' compensation claims, Occupational Safety and Health Administration [OSHA] documents, employment documents, fair medical leave, disability, unemployment).

Outcome	**7.2**	**Sourcing and Procurement:** Implement sourcing and procurement activities to obtain resources that enable achievement of organizational goals and objectives and to enhance the organization's financial wellbeing.
Competencies	7.2.4	Manage the bid or contracting process (e.g., bid specification, vendor or supplier search, bid review, selection of vendor) to achieve business goals.

Outcome	**7.5**	**Facilities Management:** Plan, maintain, and monitor property and equipment to facilitate ongoing business activities.
Competencies	7.5.1	Identify routine activities for maintaining, disposing, retiring and replacing business facilities and equipment.

Outcome	**8.1**	**Business Process Analysis:** Conduct business process analysis to identify, analyze, and solve business problems and improve process performance.
Competencies	8.1.2	Document the process activities, records or information and systems involved in business activities (e.g., developing new products, acquiring new customers, producing inventory for sale, selling goods and services, managing people).
	8.1.3	Identify process requirements and performance expectations.
	8.1.4	Identify measurements and metrics for evaluating process effectiveness and efficiency.

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Outcome	**8.3**	**Project Management:** Plan, manage, monitor, and control projects to improve workflow, minimize costs, and achieve intended project outcomes using planning and project-management tools.
Competencies	8.3.4	Document, sequence, allocate, and schedule activities to facilitate on-time and on-budget completion of project by qualified resources.

Outcome	**8.4**	**Contract Oversight:** Administer contracts to achieve organizational goals and minimize risk.
Competencies	8.4.3	Identify financial arrangements in contracts and the financial information required to verify compliance with the contract terms (e.g., cost plus pricing, contingent pricing, time and materials pricing, profit-sharing, percentage-based fees).
	8.4.4	Identify contract terms that might restrict future business activity (e.g., required credit rating, maximum debt-to-equity ratio, minimum cash reserve, prohibited lease transactions, shared information).
	8.4.5	Identify contract terms that mandate reporting of financial and non-financial information, and establish processes to collect and submit required information.
	8.4.6	Develop process to monitor contract terms for compliance and to protect against breach of contract or default.
	8.4.7	Determine strategies to manage compliance of outsourced and hosted service providers.
	8.4.11	Maintain contract compliance documentation for required timeframe.

Outcome	**9.4**	**Internal Controls:** Establish suitable internal controls to ensure the proper recording and reporting of transactions in compliance with applicable standards.
Competencies	9.4.1	Describe the impact of financial reporting and internal control regulations on control requirements (e.g., Sarbanes-Oxley Act of 2002, Dodd-Frank Wall Street Reform Act, Model Audit Rule, Government Accountability Standards).
	9.4.4	Develop and implement internal control procedures (e.g., cash controls, inventory controls, payroll controls, plant asset controls, data protection, personal information controls).
	9.4.5	Inspect and ensure the continued functioning of internal controls.

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Outcome	**9.5**	**Financial Accounting:** Track, record, and summarize financial transactions to enable accurate reporting of financial activity to external parties.
Competencies	9.5.11	Perform procedures to validate accuracy of accounting data, to identify errors and to make corrections (e.g., review trial balance, reconcile cash, proof ledgers, count inventory).
	9.5.14	Identify and preserve accounting information in compliance with regulations and policies.