**Business and Administrative Services Career Field Pathway**

**Office Management**

**Subject Code: 142005**

**Outcome & Competency Descriptions**

**Course Description:**

Office Management explores how to manage people and information in a business environment. Learners will develop knowledge and skills in relationship management, employee onboarding, other human resources operations and knowledge and information management. This course also includes learning outcomes in contract oversight and business technology applications.

**Strand 1. Business Operations/21st Century Skills**

Learners apply principles of economics, business management, marketing and employability in an entrepreneur, manager and employee role to the leadership, planning, developing and analyzing of business enterprises related to the career field.

**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.

**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.

**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 needs and identify solutions.

**Strand 3. Business Communications**

Learners communicate with internal and external stakeholders by applying relationship management techniques and business communication processes and strategies.

**Outcome 3.1 Customer Relations**

Develop, maintain and grow positive internal and external customer relationships.

**Competencies**

3.1.1 Describe the importance of meeting and exceeding customer expectations.

3.1.2 Describe how the use of technology can impact customer relationships.

3.1.3 Explain the difference between the cost of acquiring and maintaining customers.

3.1.4 Explain how customer relationships impact acceptance of business policies, recommendations and requirements of service.

3.1.5 Describe the importance of maintaining confidentiality and security of customer information.

3.1.6 Describe how a business's image and culture reflect the brand promise.

3.1.7 Communicate how the brand promise is reflected in the business's image and culture.

3.1.8 Explain the role and function of customer relationship management and its impact on business processes.

3.1.9 Identify opportunities to use social media to develop and maintain customer relationships.

**Outcome 3.2 Relationship Management**

Manage internal and external business relationships.

**Competencies**

3.2.5 Describe how organizational culture impacts business relationships.

3.2.6 Describe how sharing best practices impacts business relationships.

3.2.7 Describe ways that businesses build positive employer-employee relationships.

**Outcome 3.3 Business Communications Management**

Plan, create and evaluate internal and external business communications.

**Competencies**

3.3.1 Identify organizational communication protocols and select communication strategies as appropriate.

3.3.2 Explain how the content of communications creates reputational, legal and regulatory exposure for organizations; and describe how to manage the risk individually and collectively.

3.3.6 Develop, implement, monitor, adjust and repurpose content for an intended audience and purpose.

**Strand 4. Business Governance**

Learners acquire foundational legal knowledge and apply business governance principles to minimize risk, maintain organizational compliance and establish and maintain organizational structure.

**Outcome 4.2 Contract Oversight**

Administer and evaluate contracts.

**Competencies**

4.2.5 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).

4.2.6 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).

4.2.7 Identify contract terms that mandate reporting of financial and non-financial information and establish processes to collect and submit required information.

4.2.8 Implement the process to monitor contract terms for compliance and to protect against breach of contract or default.

4.2.9 Determine strategies to manage compliance of outsourced and hosted service providers.

**Outcome 4.3. Compliance**

Identify policies, processes and strategies to manage compliance.

**Competencies**

4.3.6 Analyze existing policies, procedures and documents to ascertain compliance with regulatory requirements and self-regulatory guidelines.

4.3.7 Discuss methods for documenting adherence to compliance policies and procedures.

**Strand 6. Business Management**

Learners identify and apply policies, processes and strategies for effective management of information, projects, strategy and talent.

**Outcome 6.4 Project Management**

Plan, manage and evaluate projects.

**Competencies**

6.4.4 Document, sequence, allocate, and schedule activities to facilitate on-time and on-budget completion of project by qualified resources.

**Outcome 6.6 Talent Acquisition**

Apply policies, processes and strategies to hire qualified candidates.

**Competencies**

6.6.5 Write and post job announcements that are consistent with federal, state and local requirements.

6.6.6 Screen and interview job applicants using legally compliant techniques (e.g., Title VII, Equal Employment Opportunity Commission, Fair Labor Standards Act).

**Outcome 6.7 Onboarding and Development**

Apply policies, processes and strategies to onboard new hires and provide growth opportunities.

**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).

**Outcome 6.10 Human Resources Operations**

Plan, implement and evaluate human resources activities.

**Competencies**

6.10.1 Process human-resource compliance paperwork, and complete required reporting (e.g., workers’ compensation claims, Occupational Safety and Health Administration [OSHA] documents, employment documents, family medical leave, disability, unemployment).

**Strand 7. Operations Management**

Learners identify and apply policies, processes and strategies for business operations.

**Outcome 7.2 Sourcing and Procurement**

Plan, implement and evaluate sourcing and procurement activities.

**Competencies**

7.2.4 Describe how the bid or contracting process (e.g., bid specification, vendor or supplier search, bid review, selection of vendor) impacts business objectives.

**Outcome 7.5 Facilities Management**

Identify, administer and evaluate methods of maintaining facilities, equipment and property.

**Competencies**

7.5.1 Identify routine activities for maintaining, disposing, retiring and replacing business facilities and equipment.

**Strand 8. Data and Process Management**

Learners apply principles of business process management to collect, analyze and distribute data and maintain business knowledge and information systems.

**Outcome 8.1 Business Process Analysis**

Identify and evaluate business processes to improve 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 business process requirements and performance expectations.

8.1.4 Identify measurements and metrics for evaluating process effectiveness and efficiency.

**Outcome 8.3 Information Management**

Identify, select and evaluate information management policies, processes and strategies.

**Competencies**

8.3.2 Manage and maintain business records (e.g., accounting information, routing orders, tracking shipments, expense reports, healthcare data, customer data, budget data, quality data, human resources data).

8.3.3 Monitor and audit internal records.

8.3.4 Identify business records requiring preservation, and archive information according to retention guidelines and regulatory requirements.

8.3.5 Identify and evaluate tools, systems and processes to manage preparation and documentation of business records.

8.3.6 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).

8.3.9 Identify strategies for integrating information technology into business operations.

**Outcome 8.4 Business Applications**

Plan, create and evaluate technology applications.

**Competencies**

8.4.2 Mine standard databases (e.g., accounting, customer, product, vendor, sales, operations, human resources, patient, supplier, procurement), apply analytical tools, and interpret the findings.

8.4.3 Implement collaborative or groupware and cloud computing applications to facilitate business operations.

8.4.5 Research and select tools for incorporating visual, interactive and social media content into business communications.

8.4.7 Develop, test and maintain a multimedia website.

**Outcome 8.5 Knowledge Management**

Identify, select and evaluate knowledge management policies, processes and strategies.

**Competencies**

8.5.4 Describe offline tools and techniques to gather and document employee knowledge and effective practices (e.g., relational networks, brainstorming, learning and idea capture, peer assist, learning reviews, storytelling, collaborative physical workspace, knowledge cafés, communities of practice).

8.5.5 Describe 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).

**Strand 9. Financial Analysis and Evaluation**

Learners apply principles of financial and managerial accounting to collect, analyze and distribute financial data, evaluate investment opportunities and operate financial services.

**Outcome 9.4 Internal Controls**

Identify, select and evaluate internal controls in compliance with applicable regulations.

**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 Explain the role and function of internal controls (e.g.., cash controls, inventory controls, payroll controls, capital asset control, data protection, personal information controls).

9.4.5 Inspect and ensure the continued functioning of internal controls.

**Outcome 9.5 Financial Accounting**

Apply principles of accounting to record and summarize financial transactions.

**Competencies**

9.5.10 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).

9.5.13 Identify and preserve accounting information in compliance with document retention policies.