

## **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: 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 to staff.**

**Performance Indicators:**

Use ethics in staff supervision (EI:078) (SU)

## **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)

Monitor business's profitability (FI:542) (MN)

## 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:** Determine technology security strategies needed to protect customer information and company image.

**Performance Indicators:**

Evaluate strategies for protecting business' digital assets (e.g., website, social media, email, etc.), customer data, and other protected information (OP:473) (MN)

Develop strategies to protect digital data (OP:105) (MN)

**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: 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, LAP-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, LAP-SM-064) (SP)

Describe managerial considerations in staffing (SM:065, LAP-SM-065) (SP)

Discuss managerial considerations in directing (SM:066, LAP-SM-066) (SP)

Describe the nature of managerial control (control process, types of control, what is controlled) (SM:004, LAP-SM-400) (SP)

Describe factors that influence management (SM:028) (MN)

**Performance Element: Control an organization's/department's activities to encourage growth and development.**

**Performance Indicators:**

Set departmental policies (SM:092) (MN)

Show the effect of departmental strategy on departmental goals/objectives (SM:093) (MN)

**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, LAP-KM-001) (SP)

Discuss the role of ethics in knowledge management (KM:002, LAP-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, LAP-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, LAP-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)

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

**Performance Indicators:**

Identify departmental business risks (RM:093) (MN)

Assess business risks (RM:094) (MN)

Assess task risks (RM:095) (MN)

## **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)

Manage office atmosphere (EI:101) (MN)

Represent employer at meetings (EI:102) (MN)

## 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)

Track client billing (FI:605) (MN)

Perform payroll duties (i.e., compile hours, write payroll checks, distribute checks) (FI:606) (MN)

Determine the impact of types of transactions on company finances (FI:607) (MN)

**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: 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: Implement organizational skills to facilitate others' work efforts.**

**Performance Indicators:**

Handle logistics for expats (HR:505) (MN)

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

**Performance Indicators:**

Train staff on system usage (HR:430) (SU)

## 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: 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)  
Prepare RFPs (Request for Proposal) (NF:183) (MN)

**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)  
Audit records periodically (NF:179) (MN)

## **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)  
Plan events (OP:358) (MN)  
Set up and coordinate conference (OP:359) (MN)

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

**Performance Indicators:**

Re-order/purchase office supplies (OP:360) (CS)  
Purchase office furniture/equipment (OP:361) (MN)

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

**Performance Indicators:**

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

**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)

**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)

## **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)

Create and maintain a work station/procedures manual (KM:009) (MN)

*Business Management Cluster*

*(PQ) = Prerequisite; (CS) = Career-sustaining; (SP) = Specialist; (SU) = Supervisor; (MN) = Manager; (ON) = Owner*

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## 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, LAP-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)

Integrate data mining (analytics) into business operations (NF:250) (MN)

**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 used 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)

Discuss the nature of enterprise architecture (NF:157) (MN)

Align technology with business needs (NF:158) (MN)

**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)

Determine the components of operational control procedures for a business (OP:464) (MN)

Maintain operational controls (OP:465) (MN)

## **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)

Determine risks and rewards of developing a strategic role for information systems/ information communication technology (SM:038) (MN)

Integrate information systems planning with business planning (SM:039) (MN)

## 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)

Develop knowledge management strategies (KM:014) (MN)

## 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)

Calculate quality costs (e.g., prevention, appraisal, failure) (QM:011) (MN)

Develop a plan/program for quality achievement (QM:005) (MN)

Determine reliability factors impacting the quality of a product/service (QM:006) (MN)

Develop continuous-improvement strategies (QM:007) (MN)

## 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)

Discuss the nature of credit risk management (RM:064) (MN)

Discuss reasons to integrate risk management into business operations (RM:055) (MN)

Integrate risk management into business operations (RM:057) (MN)

## 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)

Issue a service/goods contract (BL:087) (MN)

**Performance Element: Adhere to regulations for business expansion to meet government requirements and industry standards.**

**Performance Indicators:**

Follow domestic laws governing business expansion (BL:123) (MN)

Follow laws governing global expansion (BL:124) (MN)

**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)

Explain the nature of legal recourse in resolving global business disputes (BL:129) (MN)

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

**Performance Indicators:**

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

Develop policies/procedures to comply with regulatory requirements and self-regulatory guidelines (BL:150) (MN)

Develop a compliance program (BL:132) (MN)

**Performance Element: Resolve legal/regulatory issues to protect the company's well-being.**

**Performance Indicators:**

Mediate disputes (BL:157) (MN)

Negotiate settlement of legal and regulatory matters (BL:158) (MN)

## 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)

Develop a crisis management plan (CO:200) (MN)

## 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:**

Develop social media strategy for customer service (CR:036) (MN)

Determine customer acquisition and retention strategy (CR:037) (MN)

## 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 to staff.

**Performance Indicators:**

Explain the nature of managerial ethics (EI:079) (MN)

**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:**

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

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

Explain the nature of managerial accounting (FI:660) (SP)

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

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

**Performance Indicators:**

Assess accounting risks (FI:371) (MN)

Assess fraud risk (FI:777) (MN)

## 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:** Determine staffing needs to minimize costs while maximizing business contribution.

**Performance Indicators:**

Describe the nature of human-resources planning (HR:490) (SU)

Explain approaches to the identification of human resources in foreign markets (HR:491) (SU)

Determine causes of staff turnover (HR:492) (MN)

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

**Performance Indicators:**

Assist with leadership development of individuals (HR:509) (MN)

Facilitate career development planning (HR:510) (MN)

Participate in succession planning (HR:511) (MN)

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

**Performance Indicators:**

Manage employee turnover (HR:512) (MN)

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

**Performance Indicators:**

Mentor an employee (HR:514) (MN)

**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)

Design sustainability strategies (OP:467) (MN)

Develop a real estate master plan (OP:468) (MN)

**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)

Assess legal risks (OP:469) (MN)

Evaluate speculative business risks (OP:470) (MN)

Assess business's potential to expand into new markets (OP:471) (MN)

## **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)

**Performance Element: Adhere to a professional code of ethics to guide business decisions.**

**Performance Indicators:**

Discuss factors to consider in developing a managerial code of ethics (PD:261) (MN)

Utilize an established professional code of ethics (PD:262) (MN)

## **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 global management (SM:029) (MN)

Explain management theories and their applications (SM:030) (MN)

Explain motivation theories and their applications (SM:080) (MN)

Explain expectation-setting processes and their application (SM:081) (MN)

**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)
- Develop corporate social responsibility policies (SM:085) (MN)
- Develop corporate social responsibility strategy (SM:086) (MN)

**Performance Element: Plan organization's/department's activities to guide and support decision-making and to ensure that staff focuses on the right priorities.****Performance Indicators:**

- Describe the strategic planning process in an organization (SM:040) (MN)
- Identify and set benchmarks for key performance indicators (SM:041) (MN)
- Develop strategies for achieving company vision (SM:042) (MN)
- Develop processes that can be used to improve business results (SM:045) (MN)
- Analyze exit plan options (SM:046) (ON)
- Develop company vision (SM:047) (ON)
- Determine business's overall global strategy (SM:048) (ON)
- Develop company's management plan (SM:049) (ON)

**Performance Element: Design organizational structure to facilitate business activities.****Performance Indicators:**

- Describe organizational structures for managing foreign business activities (SM:031) (MN)
- Develop an organizational plan for human resources (SM:032) (MN)
- Develop an organizational strategy for foreign businesses (SM:033) (MN)

**Performance Element: Control organization's/department's activities to monitor business activities and to make business decisions.****Performance Indicators:**

- Discuss the importance of the coordinating/controlling role in the business environment (SM:055) (MN)
- Evaluate individual department's contribution to organizational effectiveness (SM:056) (MN)
- Apply benchmarking techniques (SM:057) (MN)
- Interpret internal information for strategic planning (e.g., financial/accounting, marketing, operations, human resources, information technology, and individual employee data) (SM:058) (MN)
- Assess company's strategic-planning processes (SM:059) (MN)

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

**Performance Indicators:**

Explain the impact of organizational change on organizational development (SM:087) (SP)

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

Assess change readiness (SM:089) (MN)

Develop change management strategy (SM:090) (MN)

Design change management programs (SM:091) (MN)

## **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)

Develop a plan/program for quality achievement (QM:005) (MN)

Develop continuous-improvement strategies (QM:007) (MN)

## **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)

Assess enterprise risk (RM:067) (MN)

Develop risk-management plan (RM:090) (MN)

Evaluate risk-management plan (RM:091) (MN)

Select risk-management strategies (RM:089) (MN)

## 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)

Determine human resources management's legal responsibility in maintaining labor relations (BL:121) (MN)

Participate in collective-bargaining process (BL:122) (MN)

## 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)

Communicate human resource strategies, plans, and policies to the workforce (CO:189) (MN)

## Instructional Area: Emotional Intelligence (EI)

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

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

**Performance Indicators:**

Negotiate benefit plan administration and improvements (e.g., reduced costs, better benefits) with carriers (EI:081) (MN)

## 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 maintain and evaluate human-resources expenses.

**Performance Indicators:**

Prepare and maintain human-resources development budget (FI:558) (MN)

Conduct cost-benefit analysis of human-resources development program (FI:779) (MN)

Determine HR's liabilities (FI:780) (MN)

## 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)

Explain factors to consider when hiring different categories of employees (e.g., interns, independent contractors, people with disabilities, seniors, non-US citizens) (HR:516) (MN)

**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)

Evaluate the use of alternative staffing methods (e.g., outsourcing, telecommuting, etc.) (HR:417) (MN)

Develop/tailor job application forms/blanks (HR:517) (MN)

Develop job descriptions and profiles (HR:518) (MN)

Assess availability of qualified applicants (HR:418) (MN)

Classify jobs (HR:419) (MN)

Establish salary ranges (HR:519) (MN)

Choose employment tests to administer to job applicants (HR:520) (MN)

Establish employee-selection procedures (HR:420) (MN)

Develop hiring policies and procedures (HR:429) (MN)

Develop strategies to market the organization to potential employees (HR:421) (MN)

Write and post job announcements (HR:521) (MN)

Develop a staffing plan (HR:422) (MN)

**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)

Recruit new employees (HR:498) (SU)

Investigate applicant's background (HR:524) (SU)

Assess employees' potential for growth and development in the organization (HR:424) (MN)

Make job offer (HR:425) (MN)

Create a job offer/denial letter (HR:525) (MN)

**Performance Element: Control talent-acquisition activities to improve efficiencies of human resources selection.****Performance Indicators:**

Evaluate the effectiveness of recruitment sources (HR:427) (MN)

Use staffing metrics to assess effectiveness of hiring decisions (e.g., cost benefit analysis, costs-per-hire, selection ratios, adverse impact, etc.) (HR:428) (MN)

Develop employee retention management plan (HR:526) (MN)

**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)
- Assist with leadership development of individuals (HR:509) (MN)
- Facilitate career development planning (HR:510) (MN)
- Develop training program (HR:447) (MN)
- Assist with development of a succession management system (HR:534) (MN)

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

**Performance Indicators:**

- Assist with establishment of work rules (HR:460) (SP)
- Implement informal performance appraisals (HR:461) (MN)
- Assist supervisors with performance appraisal tools (HR:462) (MN)
- Manage employee turnover (HR:512) (MN)
- Identify and implement HR best practices (HR:535) (MN)
- Develop written performance-management procedures (HR:463) (MN)
- Develop performance management system (HR:536) (MN)
- Establish a performance improvement plan (HR:537) (MN)
- Develop an employee handbook (HR:538) (MN)
- Develop human-resources management policy/procedure manual (HR:464) (MN)

**Performance Element: Assess human resources management activities to improve their effectiveness.**

**Performance Indicators:**

- Evaluate impact of leadership development (HR:539) (MN)
- Evaluate effectiveness of new-employee orientation (HR:436) (MN)
- Assess effectiveness of training (HR:437) (MN)
- Assess human-resources development program effectiveness (HR:448) (MN)
- Conduct HR audit (HR:540) (MN)

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

**Performance Indicators:**

- Mentor an employee (HR:514) (MN)
- Develop employee-relations programs (HR:451) (MN)
- Administer employee-retention plans (HR:541) (MN)

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

**Performance Indicators:**

- Assess effectiveness of employee-relations activities (HR:450) (SP)
- Evaluate employee engagement and commitment (HR:542) (MN)

**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)

Manage employee issues (e.g., attendance, workplace harassment, workplace violence) (HR:544) (SU)

Resolve disputes internally (HR:545) (MN)

Participate in dispute resolution (HR:456) (MN)

Discipline employees (HR:455) (MN)

Determine the strategic importance of employee exit (HR:457) (MN)

Adhere to employment-at-will regulations (HR:458) (MN)

Downsize staff due to layoffs (HR:459) (MN)

Facilitate career transitions of employees (HR:546) (MN)

**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)

Determine overtime eligibility and pay (HR:551) (MN)

**Performance Element: Design total rewards strategies to match management's goals and attract employees.**

**Performance Indicators:**

Identify pay structures (HR:470) (MN)

Determine pay grade of job (HR:471) (MN)

Determine components of total rewards system (HR:468) (MN)

Design a retirement plan (HR:478) (MN)

Establish a benefits plan (HR:479) (MN)

Create a market-based pay system (HR:466) (MN)

**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)

Evaluate benefits plan (HR:481) (MN)

Analyze pay rates (HR:473) (MN)

Analyze pay equity (HR:553) (MN)

**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)

Set up company's safety training program (HR:554) (MN)

Set up company's injury/occupational illness prevention programs (HR:486) (MN)

**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)

Apply organizational-development theories (HR:488) (MN)

Leverage workplace diversity and inclusion to achieve organizational objectives (HR:555) (MN)

Evaluate human resources management's contribution to organizational effectiveness (HR:489) (MN)

Handle HR requirements for a merger or acquisition (HR:556) (MN)

## **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)

Build a chain of evidence to demonstrate value of human resource management (NF:274) (MN)

**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)

Identify trends in human resource information systems (HRIS) (NF:162) (MN)

Institute policies/procedures to protect the privacy of human-resources information (NF:163) (MN)

**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)

Identify trends in learning management systems (NF:268) (MN)

## **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)  
Protect business's security when terminating employees (OP:224) (MN)  
Implement workplace injury/occupational illness procedures (e.g., worker's compensation, OSHA) (OP:225) (MN)  
Ensure compliance with all applicable workplace health and safety laws and regulations (OP:226) (MN)  
Facilitate investigation procedures of workplace safety, health, and security enforcement agencies (OP:227) (MN)

**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)  
Evaluate incident and emergency response plans (e.g., natural disasters, workplace safety threats, evacuations, etc.) (OP:319) (MN)  
Evaluate security plans to protect the company from liability (OP:321) (MN)  
Set up an employee-assistance program (OP:324) (MN)  
Evaluate effectiveness of safety training and incentive programs (OP:326) (MN)  
Recommend a business recovery plan (OP:484) (MN)

## **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)

Develop organizational change-management program (SM:052) (MN)

Facilitate activities to enable strategic management process implementation (SM:053) (MN)

Evaluate human resources management's contribution to organizational effectiveness (SM:054) (MN)

**Performance Element: Evaluate organization's strategic planning and policy-making processes to guide decision-making.**

**Performance Indicators:**

Apply environmental scanning techniques to assess strategic-planning processes (SM:060) (MN)

Apply results of environmental scan to business goals/objectives (SM:061) (MN)

Evaluate organizational change-management program (SM:062) (MN)

Align workforce strategies with organization's objectives (SM:098) (MN)

## **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)

Issue a service/goods contract (BL:087) (MN)

**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)

Develop policies/procedures to comply with regulatory requirements and self-regulatory guidelines (BL:150) (MN)

## 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:**

Use digital 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:**

Describe types of costs used 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 nature of managerial accounting (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, LAP-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)

Perform job costing (FI:421) (MN)

Conduct cost/benefit analysis on planned acquisitions (FI:423) (MN)

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

**Performance Indicators:**

Assess accounting risks (FI:371) (MN)

Assess fraud risk (FI:777) (MN)

## **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)

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

**Performance Indicators:**

Process customer orders (NF:169) (CS)

## **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: 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: 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)

Plan maintenance program (OP:033) (MN)

Improve maintenance program (OP:492) (MN)

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

**Performance Indicators:**

Coordinate corporate purchasing activities (OP:487) (SP)

Develop purchasing guidelines (OP:488) (MN)

**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)

Explain budgetary procedures for purchase activity (OP:253) (MN)

**Performance Element: Plan the production of a product/service to facilitate business operations.**

**Performance Indicators:**

Explain the factors impacting a master production schedule (OP:255) (MN)

Create a master production schedule (OP:256) (MN)

Evaluate the effectiveness and efficiency of a production schedule (OP:257) (MN)

Develop an operational contingency plan (OP:493) (MN)

**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)

Explain types of capacity planning (e.g., lead strategy, lag strategy, match strategy) (OP:315) (MN)

Plan work capacity (OP:316) (MN)

**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)

Analyze capabilities of electronic business systems to facilitate order fulfillment (OP:382) (MN)

Assess order fulfillment processes (OP:383) (MN)

**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)

Establish receiving schedules (OP:388) (MN)

**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)

Select appropriate storage equipment (OP:403) (MN)

Plan storage space (OP:404) (MN)

**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)

Describe strategies to minimize the cost of maintaining inventory (OP:489) (SP)

Determine inventory shrinkage (OP:415) (SP)

Maintain inventory-control systems (OP:416) (SP)

Develop inventory-control systems (OP:419) (MN)

**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)

Design sustainability strategies (OP:467) (MN)

Evaluate real estate options (OP:496) (MN)

Develop a real estate master plan (OP:468) (MN)

Manage renovation projects (OP:497) (MN)

**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)

Determine the components of operational control procedures for a business (OP:464) (MN)

Maintain operational controls (OP:465) (MN)

**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)

Align product packaging with organizational objectives (OP:504) (MN)

**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)

Manage transportation plans (OP:515) (MN)

Improve transportation processes (OP:516) (MN)

## **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)

Develop knowledge management processes (KM:023) (MN)

Assess knowledge management strategies and processes (KM:024) (MN)

Develop knowledge management strategies (KM:014) (MN)

**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)

Explain the role of organizational culture in knowledge management implementation (KM:019) (MN)

Assess knowledge-management strategies (KM:022) (MN)

## 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)

Explain ways to align product-development plans with business strategy (VM:003) (MN)

**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)

Determine feasibility of innovation (VM:010) (MN)

Develop proof of concept (VM:011) (MN)

Identify champion to push innovation through to fruition (VM:012) (MN)

Create environment to foster ongoing innovation (VM:013) (MN)

Manage innovation strategies and processes (e.g., product development, change management, project management) (VM:005) (MN)

## **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)

Calculate quality costs (e.g., prevention, appraisal, failure) (QM:011) (MN)

Develop a plan/program for quality achievement (QM:005) (MN)

Determine reliability factors impacting the quality of a product/service (QM:006) (MN)

Develop continuous-improvement strategies (QM:007) (MN)

## **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)

Comply with contract termination provisions (RM:084) (MN)

Develop plan to resolve breach of contract (e.g., renegotiation of terms, settlement, litigation) (RM:085) (MN)

### **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)

Discuss the nature of credit risk management (RM:064) (MN)

Discuss reasons to integrate risk management into business operations (RM:055) (MN)

Assess enterprise risk (RM:067) (MN)

Integrate risk management into business operations (RM:057) (MN)

Coordinate contingency planning (RM:068) (MN)

Evaluate contingency planning (RM:069) (MN)