

FBLA HS: Introduction to Business Procedures

Competency A: Human Relations	MBA Research Performance Indicators	LAPs
Tasks		
1. Identify appropriate work habits and ethics including appropriate dress.	EI:004 Demonstrate ethical work habits (PQ) PD:002 Maintain appropriate personal appearance (PQ)	LAP-EI-004 Work Right (Demonstrating Ethical Work Habits) LAP-PD-002 Look Good, Feel Good (Personal Appearance)
2. Identify, evaluate, and select training resources for employee training programs.	HR:528 Choose learning methods (SP) HR:529 Prepare a training plan (SP)	
3. Develop/explain work processes and procedures (organizational and prioritizing skills).	CO:057 Analyze company resources to ascertain policies and procedures (CS)	
4. Coordinate staff work schedule and workload distribution.	HR:497 Schedule employees (SU)	
5. Contribute to development of job descriptions for staff.	HR:518 Develop job descriptions and profiles (MN)	
6. Discuss and analyze an employee performance evaluation.	HR:463 Develop written performance-management procedures (MN) HR:368 Assess employee performance (SU)	
7. Maintain employee records.	HR:359 Maintain human resources records (SU)	
8. Update policy and procedures manual.	HR:538 Develop an employee handbook (MN) HR:464 Develop human-resources management policy/procedure manual (MN)	
9. Conduct new employee orientation and employee training.	HR:360 Orient new employees (CS) HR:361 Orient new employees (management's role) (SU)	

10. Create and maintain effective and productive work relationships.	EI:037 Foster positive working relationships (CS)	LAP-EI-037 Can You Relate? (Fostering Positive Working Relationships)
11. Work in a team to solve problems and share knowledge.	EI:045 Participate as a team member (CS)	LAP-EI-045 Team Up (Participating as a Team Member)
12. Exhibit behaviors and actions to effectively motivate and lead people.	EI:059 Motivate team members (SP) SM:080 Explain motivation theories and their applications (MN)	
Competency B: Technology Concepts	MBA Research Performance Indicators	LAPs
Tasks		
1. Conduct a needs assessment of hardware, software, furniture, equipment, and supplies.	NF:012 Determine venture's information technology needs (MN)	
2. Evaluate and recommend hardware, vendors, warranties, and purchasing options to solve specific problems.	NF:091 Establish specifications for selecting hardware/software systems (MN) OP:203 Isolate and identify source of technical problem (CS) OP:205 Obtain technical support services (CS)	
3. Remove, upgrade, store, and install computer hardware and supportive software.		
4. Navigate the basic operating system and internet applications.	NF:085 Use basic operating systems (PQ) NF:006 Demonstrate basic web-search skills (PQ)	
5. Manage files and folders.	NF:171 File records electronically/manually (CS) NF:172 Organize and maintain files (CS)	
6. Identify and use appropriate help resources to learn software and hardware and to solve problems (e.g., help desks, online help, and manuals).	OP:204 Follow manufacturer's written procedures to fix technical problem (CS) OP:205 Obtain technical support services (CS)	
7. Select and apply the appropriate productivity software to complete tasks.	NF:005 Demonstrate personal information management/productivity applications (PQ)	

8. Identify, evaluate, and select software specific to an organizational function and/or industry.	NF:012 Determine venture's information technology needs (MN)	
9. Select and apply multimedia software appropriate for specific tasks.		
Competency C: Communication Skills	MBA Research Performance Indicators	LAPs
Tasks		
1. Compose, give, and follow oral and written instructions.	CO:056 Apply written directions to achieve tasks (PQ) CO:119 Follow oral directions (PQ) CO:083 Give verbal directions (PQ) CO:139 Provide directions for completing job tasks (SU)	
2. Identify good listening skills.	CO:017 Demonstrate active listening skills (PQ)	LAP-CO-017 Listen Up! (Demonstrating Active Listening Skills)
3. Interpret verbal and nonverbal cues/behaviors to enhance communication.	CO:059 Interpret others' nonverbal cues (PQ)	
4. Locate/maintain telephone numbers and addresses.	OP:349 Update mail/telephone directories (CS)	
5. Identify proper techniques for answering, screening, and placing calls, including conference calls.	CO:114 Handle telephone calls in a businesslike manner (CS) CO:183 Field telephone calls (CS) CO:184 Screen telephone calls (CS) CO:214 Route telephone calls (CS) NF:199 Prepare for cyber- and video-conferencing (SP)	

6. Identify proper techniques for placing a caller on hold, transferring a call, and/or taking a message.	CO:114 Handle telephone calls in a businesslike manner (CS) CO:183 Field telephone calls (CS) CO:184 Screen telephone calls (CS) CO:214 Route telephone calls (CS)	
7. Identify, analyze, and evaluate emerging communications technologies for use in organizations.		
8. Process electronic communications (e.g., fax, e-mail, file transmissions).	OP:200 Operate fax machines (PQ) NF:004 Demonstrate basic e-mail functions (PQ)	
9. Prepare and deliver oral presentations.	CO:025 Make oral presentations (SP) NF:008 Demonstrate basic presentation applications (PQ) NF:123 Demonstrate advanced presentation applications (SP) NF:195 Prepare materials for presentations (CS)	LAP-CO-025 Well Said! (Making Oral Presentations)
10. Receive/greet visitors and clients; make introductions, and direct inquiries.	CO:181 Greet and direct visitors (CS)	
11. Locate, organize, and reference information from a variety of sources to communicate with co-workers and customers/clients.	CO:086 Organize information (CS) NF:078 Obtain needed information efficiently (CS) NF:080 Apply information to accomplish a task (CS) NF:173 Collect documentation needed to compile reports (CS)	
12. Communicate with customers and other employees to foster positive relations, clarify workplace objectives, and provide feedback.	CR:005 Reinforce service orientation through communication (CS) EI:129 Foster open, honest communication (SP) EI:037 Foster positive working relationships (CS) EI:098 Maintain contact with key clients/customers (SP)	LAP-EI-129 Can We Talk? (Fostering Open, Honest Communication) LAP-EI-037 Can You Relate? (Fostering Positive Working Relationships)

13. Compose business documents such as agendas, reports, and correspondence.	CO:133 Write business letters (CS) CO:094 Prepare simple written reports (SP) NF:194 Prepare agendas (CS) NF:192 Prepare company correspondence (CS) NF:181 Prepare reports (CS)	
14. Develop and interpret tables, charts, and figures to support written and oral communications.	CO:087 Select and use appropriate graphic aids (CS) CO:204 Use data visualization techniques (e.g., infographics, heat-maps, dynamic model outputs) (SP)	
Competency D: Decision Making/Management	MBA Research Performance Indicators	LAPs
Tasks		
1. Identify different types of leadership styles and describe characteristics of effective leaders.	EI:009 Explain the concept of leadership (CS)	LAP-EI-909 Lead the Way (Concept of Leadership)
2. Identify the functions of management.	SM:001 Explain the concept of management (CS)	LAP-SM-001 Manage This! (Concept of Management)
3. List the responsibilities involved at the different levels of management.	SM:001 Explain the concept of management (CS)	LAP-SM-001 Manage This! (Concept of Management)
4. Interpret an organizational chart.	EC:103 Explain the organizational design of businesses (SP)	LAP-EC-103 Designed to Work (Organizational Design of Businesses)
5. Set priorities and develop efficient procedures for workflow and monitor workloads.	EN:027 Explain methods/processes for organizing workflow (ON) EI:072 Resolve problems with workflow (SU)	
6. Develop efficient office teams and apply skills to assigned activities and to resolve conflicts.	EI:045 Participate as a team member (CS) HR:387 Coordinate efforts of cross-functional teams to achieve project/company goals (SU)	LAP-EI-045 Team Up (Participating as a Team Member)
7. Examine potential problems facing business and offer alternative solutions including contingency plans.	OP:493 Develop an operational contingency plan (MN)	

8. Acquire, analyze, access, exchange, organize, and synthesize information to guide business decision making and to increase workplace efficiency and effectiveness.	CO:086 Organize information (CS) NF:078 Obtain needed information efficiently (CS) NF:080 Apply information to accomplish a task (CS) NF:173 Collect documentation needed to compile reports (CS)	
9. Identify, write, and monitor workplace performance goals to guide progress in assigned areas of responsibility and accountability.	SM:027 Identify and benchmark key performance indicators (e.g., dashboards, scorecards, etc.) (MN)	
10. Manage quality-control processes to minimize errors and to expedite workflow.	OP:164 Utilize quality control methods at work (SP)	
Competency E: Career Development	MBA Research Performance Indicators	LAPs
Tasks		
1. Explore business careers and examine job opportunities through various sources, including newspapers, employment agencies, personal inquiries, and the Internet.	PD:025 Explain employment opportunities in business (CS) PD:022 Identify sources of career information (CS) PD:026 Utilize job-search strategies (PQ)	LAP-PD-025 Go for It! (Careers in Business)
2. Develop a career plan.	PD:023 Identify tentative occupational interest (CS)	
3. Prepare a letter of application, resume, employment application, and follow-up letter.	PD:027 Complete a job application (PQ) PD:029 Write a follow-up letter after job interviews (CS) PD:030 Write a letter of application (CS) PD:031 Prepare a resume (CS)	
4. Identify behaviors considered to be appropriate or inappropriate in a job interview.	PD:028 Interview for a job (PQ)	
5. Identify the steps to follow in resigning from a position.		
6. Develop and maintain a portfolio and personal professional documents and certifications.		

7. Identify potential employment barriers for nontraditional groups and ways to overcome the barriers.		
8. Utilize career-advancement activities to enhance professional development.	PD:036 Utilize resources that can contribute to professional development (e.g., trade journals/periodicals, professional/trade associations, classes/seminars, trade shows, and mentors) (SP)	
Competency F: Business Operations	MBA Research Performance Indicators	LAPs
Tasks		
1. Identify characteristics of an efficiently organized workstation and recommend improvements in physical layout.		
2. Make decisions on best reprographics methods to use for a specific task including appropriate paper.	OP:198 Operate copier (PQ) OP:199 Operate printer (PQ)	
3. Process incoming and outgoing mail, including electronic mail.	OP:348 Open and distribute office mail/parcels (CS) OP:350 Coordinate direct mailings (SP) NF:004 Demonstrate basic e-mail functions (PQ)	
4. Identify and coordinate special mail services and alternative courier and electronic mail services.	OP:350 Coordinate direct mailings (SP) NF:004 Demonstrate basic e-mail functions (PQ)	
5. Arrange and coordinate travel arrangements for supervisor or staff (e.g., reservations, itinerary).	NF:189 Prepare itinerary (SP) NF:167 Make travel arrangements (SP)	
6. Demonstrate time management skills.	EI:077 Manage commitments in a timely manner (CS) PD:019 Use time-management skills (SP) OP:352 Chunk and sequence tasks for timely completion of job responsibilities (CS)	LAP-EI-077 Commit to It! (Managing Commitments in a Timely Manner) LAP-PD-019 About Time (Time Management)

<p>7. Coordinate meetings, events, and activities related to the office.</p>	<p>NF:168 Make meeting arrangements (SP) OP:233 Plan meetings (SP) OP:358 Plan events (MN) OP:359 Set up and coordinate conference (MN) CO:140 Conduct a staff meeting (SU) CO:052 Conduct planning meetings (SU)</p>	
<p>8. Use Personal Information Management applications (notes, calendars, contact information) to increase workplace efficiency and to facilitate on-time, prompt completion of work activities.</p>	<p>NF:005 Demonstrate personal information management/productivity applications (PQ) NF:164 Create calendar/schedule (CS) NF:165 Maintain appointment calendar (CS)</p>	
<p>9. Establish procedures to maintain workstation, equipment, materials, and supplies.</p>	<p>KM:009 Create and maintain a work station/procedures manual (MN) OP:026 Control use of supplies (SU)</p>	
<p>10. Troubleshoot problems with office equipment to make repairs and/or to obtain technical support.</p>	<p>OP:203 Isolate and identify source of technical problem (CS) OP:204 Follow manufacturer's written procedures to fix technical problem (CS) OP:205 Obtain technical support services (CS)</p>	
<p>11. Maintain office equipment such as printers, copiers, and fax machines (add toner, load paper, clear paper path, change cartridge).</p>	<p>OP:198 Operate copier (PQ) OP:199 Operate printer (PQ) OP:200 Operate fax machines (PQ)</p>	
<p>12. Manage preventive maintenance and repair of equipment.</p>	<p>OP:006 Follow instructions for use of equipment, tools, and machinery (PQ)</p>	
<p>13. Implement processes for purchasing business supplies, equipment, and services.</p>	<p>OP:016 Place orders/reorders (CS) OP:031 Maintain inventory of supplies (CS) OP:360 Re-order/purchase office supplies (CS) OP:361 Purchase office furniture/equipment (MN)</p>	

14. Identify types of business ownership.	BL:003 Explain types of business ownership (CS)	LAP-BL-003 Own It Your Way (Types of Business Ownership)
Competency G: Database/Information Management	MBA Research Performance Indicators	LAPs
Tasks		
1. Establish and maintain document and information storage and retrieval system.	NF:081 Store information for future use (CS) NF:002 Maintain customer records (SP) NF:172 Organize and maintain files (CS) NF:175 Set up filing system appropriate for media/documents being stored (SP) NF:176 Control incoming/outgoing documentation process (SP) NF:177 Develop retention system appropriate for media/documents being stored (SP) NF:178 Archive information according to retention procedures (SP)	
2. Prepare and maintain an inventory record of software, furniture, hardware, equipment, and supplies.	OP:031 Maintain inventory of supplies (CS)	
3. Maintain (index, code, sort, and file) alphabetical, subject, numerical, and chronological filing system and retrieve information from files.	NF:081 Store information for future use (CS) NF:171 File records electronically/manually (CS) NF:172 Organize and maintain files (CS) NF:175 Set up filing system appropriate for media/documents being stored (SP) OP:347 Code and enter data (CS)	
4. Maintain tickler file system and retrieve information from files.	NF:141 Access information in the database system (SP) NF:151 Demonstrate basic data mining techniques (SP) NF:125 Mine databases for information (SP)	

5. Maintain reference library, clippings, and historical records.		
6. Purge records and/or files.	NF:179 Audit records periodically (MN)	
7. Convert and save data using scanning equipment.	NF:177 Develop retention system appropriate for media/documents being stored (SP) NF:178 Archive information according to retention procedures (SP) NF:128 Capture text using OCR (optical character reader) software (SP) NF:131 Utilize imaging software (SP) OP:202 Operate scanner (CS)	
Competency H: Ethics/Safety	MBA Research Performance Indicators	LAPs
Tasks		
1. Identify major causes of office-related accidents and establish safety and security measures to maintain office safety.	OP:008 Maintain a safe work environment (CS) OP:151 Identify potential safety issues (MN) OP:012 Establish safety policies and procedures (MN)	
2. Adhere to privacy, safety and security policies and legislation (e.g., acceptable use policy, Web page policies, student photo policies, computer crime, fraud, abuse).	OP:441 Explain information privacy, security, and confidentiality considerations in business (CS) OP:064 Maintain data security (CS) OP:206 Adhere to technology safety and security policies (e.g., acceptable use policy, web page policies) (CS) OP:208 Adhere to laws pertaining to computer crime, fraud, and abuse (CS)	
3. Implement organizational policies and procedures for security, privacy, and risk management.	OP:206 Adhere to technology safety and security policies (e.g., acceptable use policy, web page policies) (CS) OP:208 Adhere to laws pertaining to computer crime, fraud, and abuse (CS)	

4. Demonstrate knowledge of an emergency/disaster plan.	OP:209 Follow procedures used to restart and recover from situations (e.g., system failure, virus infection) (CS)	
5. Discuss basic issues related to responsible use of technology and describe personal or legal consequences of inappropriate use.	OP:206 Adhere to technology safety and security policies (e.g., acceptable use policy, web page policies) (CS) OP:208 Adhere to laws pertaining to computer crime, fraud, and abuse (CS)	
6. Identify confidentiality concepts and policies in an office.	EI:076 Exercise confidentiality (CS)	
7. Identify characteristics of professional conduct and work ethics (integrity, loyalty, honesty, courtesy, etc.).	EI:004 Demonstrate ethical work habits (PQ) EI:123 Describe the nature of ethics (CS)	LAP-EI-004 Work Right (Demonstrating Ethical Work Habits) LAP-EI-123 Rules to Live By (Nature of Ethics)
8. Analyze various ethical issues and problems related to the office including acceptable/unacceptable office behavior.	EI:124 Explain reasons for ethical dilemmas (CS) EI:125 Recognize and respond to ethical dilemmas (CS)	LAP-EI-124 What's the Situation? (Reasons for Ethical Dilemmas) LAP-EI-125 Make the Right Choice (Recognizing and Responding to Ethical Dilemmas)
9. Examine factors related to ergonomics and its importance to the office worker.	OP:207 Apply ergonomic techniques to technology tasks (CS)	
10. Read, interpret, and adhere to software license agreements and legal mandates (e.g., ADA, Sarbanne-Oxly).	OP:208 Adhere to laws pertaining to computer crime, fraud, and abuse (CS)	

Competency I: Finance	MBA Research Performance Indicators	LAPs
Tasks		
1. Prepare banking transactions (deposit slips, reconcile bank statement, etc.).	FI:560 Write checks (PQ) FI:069 Maintain financial records (PQ) FI:070 Balance a bank account (PQ) FI:113 Explain cash control procedures (e.g., signature cards, deposit slips, internal/external controls, cash clearing, etc.) (CS)	
2. Use manual and electronic methods to complete payroll documents and other financial transactions.	FI:606 Perform payroll duties (i.e., compile hours, write payroll checks, distribute checks) (MN)	
3. Apply uses of calculator or computer numeric keypad in solving business problems.	OP:197 Operate calculator (PQ)	
4. Develop budgets for office and/or specific events and manage expenses.	FI:604 Track expenses (SP) FI:099 Develop company's/department's budget (MN)	LAP-FI-099 Build Your Game Plan (Developing a Company/Department Budget)
5. Complete purchase requisitions and vouchers for payment.	FI:679 Account for purchases (e.g., purchase requisitions, purchase orders, invoices, vouchers, etc.) (CS)	
6. Implement expense-control strategies to enhance a business's financial well-being (budgets, expenses, contracts).	FI:604 Track expenses (SP) NF:197 Prepare expense report tools (SP) OP:025 Explain employee's role in expense control (SP) OP:029 Develop expense control plans (MN)	LAP-OP-025 Buck Busters (Employee Role in Expense Control)
7. Manage business records to maintain needed documentation.	NF:171 File records electronically/manually (CS) NF:172 Organize and maintain files (CS) NF:002 Maintain customer records (SP)	

<p>8. Record transactions to manage cash fund accounts such as petty cash.</p>	<p>FI:607 Determine the impact of types of transactions on company finances (MN) FI:113 Explain cash control procedures (e.g., signature cards, deposit slips, internal/external controls, cash clearing, etc.) (CS) FI:310 Maintain petty-cash fund (SP)</p>	
<p>9. General finance terms and conditions.</p>	<p>FI:579 Describe the need for financial information (CS) FI:085 Explain the concept of accounting (CS)</p>	<p>LAP-FI-579 By the Numbers (The Need for Financial Information) LAP-FI-085 Show Me the Money (Nature of Accounting)</p>
<p>Competency J: Information Processing</p>	<p>MBA Research Performance Indicators</p>	<p>LAPs</p>
<p>Tasks</p>		
<p>1. Create, format, and key business documents (agendas, statistical documents, correspondence, reports, etc.) using a variety of input technologies to maximize productivity (keyboarding, scanning, speech recognition, and digital cameras).</p>	<p>NF:007 Demonstrate basic word processing skills (PQ) NF:122 Demonstrate advanced word-processing skills (SP) NF:128 Capture text using OCR (optical character reader) software (SP) NF:129 Use voice recognition technology to prepare documents (SP) NF:131 Utilize imaging software (SP) NF:192 Prepare company correspondence (CS) NF:194 Prepare agendas (CS) NF:195 Prepare materials for presentations (CS) NF:181 Prepare reports (CS)</p>	
<p>2. Utilize software to revise, edit, save, and output documents.</p>	<p>NF:007 Demonstrate basic word processing skills (PQ) NF:122 Demonstrate advanced word-processing skills (SP)</p>	

3. Transcribe business correspondence (correspondence, reports, minutes of meetings, etc.).	KM:008 Take minutes of meetings (SP)	
4. Dictate notes and correspondence.		
5. Create and format tables, charts, and graphs.	CO:204 Use data visualization techniques (e.g., infographics, heat-maps, dynamic model outputs) (SP)	
6. Perform a variety of word processing functions (merge text, sort data, search/replace data, create macros, use templates, etc.).	NF:007 Demonstrate basic word processing skills (PQ) NF:122 Demonstrate advanced word-processing skills (SP)	
7. Convert document from one operating system to another or one software program to another.		
8. Create, edit, and enhance spreadsheets.	NF:010 Demonstrate basic spreadsheet applications (PQ) NF:126 Demonstrate advanced spreadsheet applications (SP)	
9. Create and edit a database.	NF:009 Demonstrate basic database applications (PQ) NF:124 Demonstrate advanced database applications (SP)	
10. Extract useful information using search queries and generate reports.	NF:121 Demonstrate advanced web-search skills (SP) NF:125 Mine databases for information (SP)	
11. Integrate database, spreadsheet, graphic, and word processing files.	NF:088 Use an integrated business software application package (CS)	
12. Complete preprinted and electronic forms (applications, invoices, purchase orders, purchase invoices, checks, credit memos, and labels).		
13. Scan documents, data, or graphics for document use.	NF:131 Utilize imaging software (SP) OP:202 Operate scanner (CS)	

14. Proofread and edit documents for accuracy and content, grammar, spelling, and punctuation.	NF:180 Proofread documents (CS) NF:196 Edit documents (SP) CO:089 Edit and revise written work consistent with professional standards (CS)	
15. Develop a presentation and/or visual aids that include multiple slides with text and graphics.	NF:008 Demonstrate basic presentation applications (PQ) NF:123 Demonstrate advanced presentation applications (SP)	
16. Demonstrate ability to use office and online references.		
17. Employ collaborative/groupware applications to facilitate group work (shared files, instant messaging, or virtual meetings).	NF:011 Demonstrate collaborative/groupware applications (CS)	
18. Reproduce and distribute documents and information.	OP:198 Operate copier (PQ) OP:199 Operate printer (PQ)	