COLLEGIATE DECA

PERFORMANCE INDICATORS

BUSINESS MANAGEMENT + ADMINISTRATION CAREER CLUSTER

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

INDIVIDUAL CASE STUDY EVENTS

HUMAN RESOURCE MANAGEMENT
Human Resource Management Pathway

RETAIL MANAGEMENT
General Management Pathway

TEAM CASE STUDY EVENTS

BUSINESS ETHICS
General Management Pathway

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

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

For additional information on these Performance Indicators, the National Curriculum Framework, or the National Business Administration Standards, please visit the MBAResearch web site at www.MBAResearch.org. Questions may be e-mailed to service@MBAResearch.org.

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Instructional Area: Business Law (BL)

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

Performance Element: Acquire foundational knowledge of business laws and regulations to understand their nature and scope.
Performance Indicators:
Comply with the spirit and intent of laws and regulations (BL:163) (CS)
Discuss the nature of law and sources of law in the United States (BL:067) (SP)
Describe the United States' judicial system (BL:068) (SP)
Describe methods used to protect intellectual property (BL:051) (SP)
Describe legal issues affecting businesses (BL:001) (SP)
Discuss the nature and sources of international law (i.e., treaties and international customs) (BL:142) (MN)
Discuss the nature and sources of foreign law (i.e., country judicial and legislative actions) (BL:143) (MN)
Explain the impact of global legal systems on settling international business disputes (BL:144) (MN)

Performance Element: Understand the civil foundations of the legal environment of business to demonstrate knowledge of contracts.
Performance Indicators:
Identify the basic torts relating to business enterprises (BL:069) (SP)
Describe the nature of legally binding contracts (BL:002) (SP)

Performance Element: Explore the regulatory environment of United States' businesses to understand the diversity of regulations.
Performance Indicators:
Describe the nature of legal procedure (BL:070) (SP)
Discuss the nature of debtor-creditor relationships (BL:071) (SP)
Explain the nature of agency relationships (BL:072) (SP)
Discuss the nature of environmental law (BL:073) (SP)
Discuss the role of administrative law (BL:074) (SP)

Performance Element: Understand human-resources laws and regulations to facilitate business operations.
Performance Indicators:
Explain the nature of human resources regulations (BL:007) (SU)
Explain the nature of workplace regulations (including OSHA, ADA) (BL:008) (SU)
Discuss employment relationships (BL:075) (SU)

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Performance Element: Apply knowledge of business ownership to establish and continue business operations.
Performance Indicators:
Explain types of business ownership (BL:003) (CS)
Select form of business ownership (BL:006) (ON)

Performance Element: Acquire knowledge of commerce laws and regulations to continue business operations.
Performance Indicators:
Explain the nature of import/export law (BL:145) (SP)
Describe the nature of customs regulations (BL:126) (SP)
Explain the nature of trade regulations (BL:004) (MN)
Describe the impact of antitrust legislation (BL:076) (MN)

Performance Element: Understand tax laws and regulations to adhere to government requirements.
Performance Indicators:
Explain the nature of tax regulations on business (BL:009) (ON)
Explain the nature of businesses' reporting requirements (BL:010) (ON)
Develop strategies for legal/government compliance (BL:011) (ON)

Instructional Area: Communication Skills (CO)

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

Performance Element: Read to acquire meaning from written material and to apply the information to a task.
Performance Indicators:
Identify sources that provide relevant, valid written material (CO:054) (PQ)
Extract relevant information from written materials (CO:055) (PQ)
Apply written directions to achieve tasks (CO:056) (PQ)
Analyze company resources to ascertain policies and procedures (CO:057) (CS)

Performance Element: Apply active listening skills to demonstrate understanding of what is being said.
Performance Indicators:
Explain communication techniques that support and encourage a speaker (CO:082) (PQ)
Follow oral directions (CO:119) (PQ)
Demonstrate active listening skills (CO:017) (PQ)

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Performance Element: Apply verbal skills to obtain and convey information.
Performance Indicators:
Explain the nature of effective verbal communications (CO:147) (PQ)
Ask relevant questions (CO:058) (PQ)
Interpret others' nonverbal cues (CO:059) (PQ)
Provide legitimate responses to inquiries (CO:060) (PQ)
Give verbal directions (CO:083) (PQ)
Employ communication styles appropriate to target audience (CO:084) (CS)
Defend ideas objectively (CO:061) (CS)
Handle phone calls in a businesslike manner (CO:114) (CS)
Participate in group discussions (CO:053) (CS)
Facilitate (lead) group discussions (CO:201) (SP)
Make oral presentations (CO:025) (SP)

Performance Element: Record information to maintain and present a report of business activity.
Performance Indicators:
Utilize note-taking strategies (CO:085) (CS)
Organize information (CO:086) (CS)
Select and use appropriate graphic aids (CO:087) (CS)

Performance Element: Write internal and external business correspondence to convey and obtain information effectively.
Performance Indicators:
Explain the nature of effective written communications (CO:016) (CS)
Select and utilize appropriate formats for professional writing (CO:088) (CS)
Edit and revise written work consistent with professional standards (CO:089) (CS)
Write professional emails (CO:090) (CS)
Write business letters (CO:133) (CS)
Write informational messages (CO:039) (CS)
Write inquiries (CO:040) (CS)
Write persuasive messages (CO:031) (SP)
Write executive summaries (CO:091) (SP)
Prepare simple written reports (CO:094) (SP)
Explain how digital communications (e.g., email, text messages, chats) exposes business to risk (CO:202) (SP)
Adapt written correspondence to targeted audiences (CO:203) (SP)
Use data visualization techniques (e.g., infographics, heat-maps, dynamic model outputs) (CO:204) (SP)
Prepare complex written reports (CO:009) (MN)
Write proposals (CO:062) (MN)

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Performance Element: Use social media to communicate with a business's stakeholders.
Performance Indicators:
Describe the impact of a person's social media brand on the achievement of organizational objectives (CO:205) (CS)
Distinguish between using social media for business and personal purposes (CO:206) (CS)

Performance Element: Communicate with staff to clarify workplace objectives.
Performance Indicators:
Explain the nature of staff communication (CO:014) (CS)
Choose and use appropriate channel for workplace communication (CO:092) (CS)
Participate in a staff meeting (CO:063) (CS)
Participate in problem-solving groups (CO:067) (CS)
Provide directions for completing job tasks (CO:139) (SU)
Update employees on business and economic trends (CO:172) (SU)
Conduct a staff meeting (CO:140) (SU)
Conduct planning meetings (CO:052) (SU)

Instructional Area: Customer Relations (CR)

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

Performance Element: Foster positive relationships with customers to enhance company image.
Performance Indicators:
Explain the nature of positive customer relations (CR:003) (CS)
Demonstrate a customer service mindset (CR:004) (CS)
Develop rapport with customers (CR:029) (CS)
Reinforce service orientation through communication (CR:005) (CS)
Respond to customer inquiries (CR:006) (CS)
Adapt communication to the cultural and social differences among clients (CR:019) (CS)
Interpret business policies to customers/clients (CR:007) (CS)
Build and maintain relationships with customers (CR:030) (SP)
Explain management's role in customer relations (CR:008) (MN)

Performance Element: Resolve conflicts with/for customers to encourage repeat business.
Performance Indicators:
Handle difficult customers (CR:009) (CS)
Handle customer/client complaints (CR:010) (CS)

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Performance Element: Reinforce company's image to exhibit the company's brand promise.
Performance Indicators:
Identify company's brand promise (CR:001) (CS)
Determine ways of reinforcing the company's image through employee performance (CR:002) (CS)

Performance Element: Understand the nature of customer relationship management to show its contributions to a company.
Performance Indicators:
Discuss the nature of customer relationship management (CR:016) (SP)
Explain the role of ethics in customer relationship management (CR:017) (SP)
Describe the use of technology in customer relationship management (CR:018) (SP)

Instructional Area: Economics (EC)

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

Performance Element: Understand fundamental economic concepts to obtain a foundation for employment in business.
Performance Indicators:
Distinguish between economic goods and services (EC:002) (CS)
Explain the concept of economic resources (EC:003) (CS)
Describe the concepts of economics and economic activities (EC:001) (CS)
Determine economic utilities created by business activities (EC:004) (CS)
Explain the principles of supply and demand (EC:005) (CS)
Describe the functions of prices in markets (EC:006) (CS)

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

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Performance Element: Understand economic systems to be able to recognize the environments in which businesses function.
Performance Indicators:
Explain the types of economic systems (EC:007) (CS)
Identify the impact of small business/entrepreneurship on market economies (EC:065) (CS)
Explain the concept of private enterprise (EC:009) (CS)
Identify factors affecting a business's profit (EC:010) (CS)
Determine factors affecting business risk (EC:011) (CS)
Explain the concept of competition (EC:012) (CS)

Performance Element: Acquire knowledge of the impact of government on business activities to make informed economic decisions.
Performance Indicators:
Determine the relationship between government and business (EC:008) (CS)
Describe the nature of taxes (EC:072) (SP)
Discuss the nature of monetary policy (EC:073) (MN)
Discuss the supply and demand for money (EC:096) (MN)
Explain the role of the Federal Reserve System (EC:097) (MN)
Explain the concept of fiscal policies (EC:074) (MN)
Describe the effects of fiscal and monetary policies (EC:098) (MN)
Describe the effects of foreign fiscal and monetary policies on the domestic economy (EC:139) (MN)

Performance Element: Analyze cost/profit relationships to guide business decision-making.
Performance Indicators:
Explain the concept of productivity (EC:013) (CS)
Analyze impact of specialization/division of labor on productivity (EC:014) (SP)
Explain the concept of organized labor and business (EC:015) (SP)
Explain the impact of the law of diminishing returns (EC:023) (SP)
Describe the concept of economies of scale (EC:077) (MN)

Performance Element: Understand economic indicators to recognize economic trends and conditions.
Performance Indicators:
Discuss the measure of consumer spending as an economic indicator (EC:081) (SP)
Describe the economic impact of inflation on business (EC:083) (SP)
Explain the concept of Gross Domestic Product (GDP) (EC:017) (SP)
Discuss the impact of a nation's unemployment rates (EC:082) (SP)
Explain the economic impact of interest-rate fluctuations (EC:084) (SP)
Determine the impact of business cycles on business activities (EC:018) (SP)

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Performance Element: Understand global trade's impact to aid business decision-making.
Performance Indicators:
Explain the nature of global trade (EC:016) (SP)
Discuss the impact of globalization on business (EC:109) (SP)
Describe the determinants of exchange rates and their effects on the domestic economy (EC:100) (SP)
Explain cultural considerations that impact global business relations (EC:110) (SP)
Discuss the impact of cultural and social environments on global trade (EC:045) (SP)
Describe the impact of electronic communication tools (e.g., internet, video- and computer-conferencing, webcasts, email) on global business activities (EC:111) (SP)
Explain the impact of major trade alliances on business activities (EC:112) (SP)
Describe the impact of the political environment on world trade (EC:113) (SP)
Explain the impact of geography on world trade (EC:114) (SP)
Describe the impact of a country's history on world trade (EC:115) (SP)
Explain the impact of a country's economic development on world trade (EC:116) (SP)
Discuss the impact of bribery and foreign monetary payments on business (EC:140) (SP)
Identify requirements for international business travel (e.g., passport, visa, proof of citizenship, immunizations, and sponsorship letters) (EC:141) (SP)
Explain labor issues associated with global trade (EC:101) (SU)
Discuss the potential impact of emerging economies on business activities (EC:117) (MN)

Instructional Area: Emotional Intelligence (EI)

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

Performance Element: Foster self-understanding to recognize the impact of personal feelings on others.
Performance Indicators:
Describe the nature of emotional intelligence (EI:001) (PQ)
Explain the concept of self-esteem (EI:016) (PQ)
Recognize and overcome personal biases and stereotypes (EI:017) (PQ)
Assess personal strengths and weaknesses (EI:002) (PQ)
Assess personal behavior and values (EI:126) (PQ)

Performance Element: Develop personal traits to foster career advancement.
Performance Indicators:
Identify desirable personality traits important to business (EI:018) (PQ)
Exhibit self-confidence (EI:023) (PQ)
Demonstrate interest and enthusiasm (EI:020) (PQ)
Explain the importance of demonstrating initiative (EI:024) (PQ)

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

Performance Element: Exhibit techniques to manage emotional reactions to people and situations.
Performance Indicators:
Exhibit a positive attitude (EI:019) (PQ)
Demonstrate self-control (EI:025) (PQ)
Explain the use of feedback for personal growth (EI:003) (PQ)
Adjust to change (EI:026) (PQ)

Performance Element: Identify with others' feelings, needs, and concerns to enhance interpersonal relations.
Performance Indicators:
Respect the privacy of others (EI:029) (PQ)
Show empathy for others (EI:030) (PQ)
Maintain the confidentiality of others (EI:103) (CS)
Exhibit cultural sensitivity (EI:033) (CS)
Leverage personality types in business situations (EI:104) (SP)
Adapt management style to the personality type of others (EI:105) (SU)

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

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Performance Element: Use communication skills to influence others.
Performance Indicators:
"Sell" ideas to others (EI:108) (SP)
Persuade others (EI:012) (SP)
Demonstrate negotiation skills (EI:062) (SP)
Offer constructive criticism (EI:080) (SU)

Performance Element: Manage stressful situations to minimize potential negative impact.
Performance Indicators:
Use appropriate assertiveness (EI:008) (PQ)
Use conflict-resolution skills (EI:015) (CS)
Explain the nature of office politics (EI:109) (CS)
Overcome problems and difficulties associated with office politics/turf wars (EI:095) (CS)
Explain the nature of stress management (EI:028) (SP)
Manage crises in relationships (EI:110) (SU)

Performance Element: Implement teamwork techniques to accomplish goals.
Performance Indicators:
Participate as a team member (EI:045) (CS)
Use consensus-building skills (EI:011) (SP)
Motivate team members (EI:059) (SP)
Encourage team building (EI:044) (SU)

Performance Element: Employ leadership skills to achieve workplace objectives.
Performance Indicators:
Explain the concept of leadership (EI:009) (CS)
Explain the nature of ethical leadership (EI:131) (CS)
Model ethical behavior (EI:132) (CS)
Determine personal vision (EI:063) (CS)
Inspire others (EI:133) (CS)
Demonstrate adaptability (EI:006) (CS)
Develop an achievement orientation (EI:027) (CS)
Challenge the status quo (EI:134) (CS)
Lead change (EI:005) (CS)
Enlist others in working toward a shared vision (EI:060) (CS)
Coach others (EI:041) (CS)
Use power appropriately (EI:135) (SP)
Act as a role model to fulfill the organization's standards/values (EI:111) (SU)
Recognize/Reward others for their efforts and contributions (EI:014) (SP)

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Performance Element: Manage internal and external business relationships to foster positive interactions.
Performance Indicators:
Treat others with dignity and respect (EI:036) (PQ)
Foster positive working relationships (EI:037) (CS)
Consider conflicting viewpoints (EI:136) (CS)
Assess long-term value and impact of actions on others (EI:137) (SP)
Maintain collaborative partnerships with colleagues (EI:061) (SP)
Explain the impact of political relationships within an organization (EI:034) (SP)
Explain the nature of organizational culture (EI:064) (SP)
Interpret and adapt to a business's culture (EI:112) (SP)
Determine stakeholder expectations (EI:113) (MN)
Establish strategic relationships with others (EI:114) (MN)
Share best practices with key individuals and groups (EI:115) (MN)
Leverage business relationships (EI:116) (MN)

Instructional Area: Entrepreneurship (EN)

Standard: Understands the concepts, processes, and skills associated with identifying new ideas, opportunities, and methods and with creating or starting a new project or venture

Performance Element: Understand fundamental factors about entrepreneurship to recognize its role and importance in the economy.
Performance Indicators:
Describe the nature of entrepreneurship (EN:039) (SP)
Explain the role requirements of entrepreneurs and owners (EN:040) (SP)
Describe the use of business ethics in entrepreneurship (EN:044) (SP)
Describe small-business opportunities in international trade (EN:041) (SP)

Performance Element: Employ entrepreneurial discovery strategies to generate feasible ideas for business ventures.
Performance Indicators:
Explain the need for entrepreneurial discovery (EN:001) (ON)
Discuss entrepreneurial discovery processes (EN:002) (ON)
Assess global trends and opportunities for business ventures (EN:003) (ON)
Determine opportunities for venture creation (EN:004) (ON)
Assess opportunities for venture creation (EN:005) (ON)
Generate venture ideas (EN:006) (ON)
Determine feasibility of venture ideas (EN:038) (ON)

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Performance Element: Develop concept for new business venture to evaluate its success potential.
Performance Indicators:
Describe entrepreneurial planning considerations (EN:007) (ON)
Explain tools used by entrepreneurs for venture planning (EN:008) (ON)
Assess start-up requirements (EN:009) (ON)
Assess risks associated with venture (EN:010) (ON)
Describe external resources useful to entrepreneurs during concept development (EN:011) (ON)
Assess the need to use external resources for concept development (EN:012) (ON)
Select strategies to protect intellectual property (EN:013) (ON)
Use components of business plan to define venture idea (EN:014) (ON)
Select market-entry strategies for conducting business internationally (EN:122) (ON)

Performance Element: Determine needed resources for a new business venture to contribute to its start-up viability.
Performance Indicators:
Describe processes used to acquire adequate financial resources for venture creation/start-up (EN:015) (ON)
Select sources to finance venture creation/start-up (EN:016) (ON)
Explain factors to consider in determining a venture's human-resources needs (EN:017) (ON)
Explain considerations in making the decision to hire staff (EN:018) (ON)
Describe considerations in selecting capital resources (EN:019) (ON)
Identify capital resources needed for the venture (EN:020) (ON)
Assess the costs/benefits associated with resources (EN:021) (ON)

Performance Element: Actualize new business venture to generate profit and/or meet objectives.
Performance Indicators:
Establish banking procedures (EN:042) (ON)
Use external resources to supplement entrepreneur's expertise (EN:022) (ON)
Explain the complexity of business operations (EN:023) (ON)
Establish line of credit (EN:043) (ON)
Evaluate risk-taking opportunities (EN:024) (ON)
Explain the need for business systems and procedures (EN:025) (ON)
Describe the use of operating procedures (EN:026) (ON)
Explain methods/processes for organizing workflow (EN:027) (ON)
Develop and/or provide product/service (EN:028) (ON)
Use creative problem-solving in business activities/decisions (EN:029) (ON)
Explain the impact of resource productivity on venture success (EN:030) (ON)
Create processes for ongoing opportunity recognition (EN:031) (ON)
Develop plan to invest resources into improving current products or creating new ones (EN:032) (ON)
Adapt to changes in business environment (EN:033) (ON)

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Performance Element: Select harvesting strategies to identify entrepreneur's role in the business venture.
Performance Indicators:
Explain the need for continuation planning (EN:034) (ON)
Describe methods of venture harvesting (EN:035) (ON)
Evaluate options for continued venture involvement (EN:036) (ON)
Develop exit strategies (EN:037) (ON)

Instructional Area: Financial Analysis (FI)

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

Performance Element: Understand the fundamental principles of money needed to make financial exchanges.
Performance Indicators:
Explain forms of financial exchange (cash, credit, debit, electronic funds transfer, etc.) (FI:058) (PQ)
Identify types of currency (paper money, coins, banknotes, government bonds, treasury notes, etc.) (FI:059) (PQ)
Describe functions of money (medium of exchange, unit of measure, store of value) (FI:060) (PQ)
Describe sources of income and compensation (FI:061) (CS)
Explain the time value of money (FI:062) (CS)
Explain the purposes and importance of credit (FI:002) (CS)
Explain legal responsibilities associated with consumer financial products and services (FI:063) (CS)

Performance Element: Analyze financial needs and goals to determine financial requirements.
Performance Indicators:
Explain the need to save and invest (FI:270) (CS)
Set financial goals (FI:065) (CS)
Develop personal budget (FI:066) (CS)
Determine personal net worth (FI:562) (CS)

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Performance Element: Manage personal finances to achieve financial goals.
Performance Indicators:
Explain the nature of tax liabilities (FI:067) (PQ)
Interpret a pay stub (FI:068) (PQ)
Write checks (FI:560) (PQ)
Maintain financial records (FI:069) (PQ)
Balance a bank account (FI:070) (PQ)
Explain the nature of charitable giving (FI:567) (PQ)
Manage online accounts (FI:830) (CS)
Calculate the cost of credit (FI:782) (CS)
Demonstrate the wise use of credit (FI:071) (CS)
Validate credit history (FI:072) (CS)
Make responsible financial decisions (FI:783) (CS)
Protect against identity theft (FI:073) (CS)
Pay bills (FI:565) (CS)
Apply for a consumer loan (FI:625) (SP)
Control debt (FI:568) (CS)
Prepare personal income tax forms (FI:074) (CS)
Discuss options for financing a college education (FI:831) (CS)
Discuss the nature of retirement planning (FI:569) (CS)
Explain the nature of estate planning (FI:572) (CS)

Performance Element: Understand the use of financial-services providers to aid in financial-goal achievement.
Performance Indicators:
Describe types of financial-services providers (FI:075) (CS)
Discuss considerations in selecting a financial-services provider (FI:076) (CS)

Performance Element: Use investment strategies to ensure financial well-being.
Performance Indicators:
Explain types of investments (FI:077) (CS)
Establish investment goals and objectives (FI:079) (MN)

Performance Element: Use risk management products to protect a business's financial well-being.
Performance Indicators:
Describe the concept of insurance (FI:081) (CS)
Obtain insurance coverage (FI:082) (ON)
Settle insurance losses (FI:083) (ON)

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Performance Element: Identify potential threats and opportunities to protect financial well-being.
Performance Indicators:
Determine insurance needs (FI:571) (SP)

Performance Element: Acquire a foundational knowledge of accounting to understand its nature and scope.
Performance Indicators:
Describe the need for financial information (FI:579) (CS)
Explain the concept of accounting (FI:085) (CS)
Discuss the role of ethics in accounting (FI:351) (SP)
Explain the use of technology in accounting (FI:352) (SP)
Explain legal considerations for accounting (FI:353) (SP)

Performance Element: Implement accounting procedures to track money flow and to determine financial status.
Performance Indicators:
Describe the nature of cash flow statements (FI:091) (SP)
Prepare cash flow statements (FI:092) (MN)
Explain the nature of balance sheets (FI:093) (SP)
Describe the nature of income statements (FI:094) (SP)

Performance Element: Acquire a foundational knowledge of finance to understand its nature and scope.
Performance Indicators:
Explain the role of finance in business (FI:354) (CS)
Discuss the role of ethics in finance (FI:355) (SP)
Explain legal considerations for finance (FI:356) (SP)

Performance Element: Implement financial skills to obtain business credit and to control its use.
Performance Indicators:
Explain the purposes and importance of obtaining business credit (FI:023) (ON)
Analyze critical banking relationships (FI:039) (ON)
Make critical decisions regarding acceptance of bank cards (FI:040) (ON)
Determine financing needed for business operations (FI:043) (ON)
Identify risks associated with obtaining business credit (FI:041) (ON)
Explain sources of financial assistance (FI:031) (ON)
Explain loan evaluation criteria used by lending institutions (FI:034) (ON)
Complete loan application package (FI:033) (ON)

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Performance Element: Manage financial resources to ensure solvency.
Performance Indicators:
Describe the nature of budgets (FI:106) (SP)
Explain the nature of operating budgets (FI:098) (SU)
Describe the nature of cost-benefit analysis (FI:357) (MN)
Determine relationships among total revenue, marginal revenue, output, and profit (FI:358) (MN)
Develop company's/department's budget (FI:099) (MN)
Forecast sales (FI:096) (MN)
Calculate financial ratios (FI:097) (MN)
Interpret financial statements (FI:102) (MN)
File business tax returns (FI:652) (ON)
Verify the accuracy of business financial records (FI:653) (ON)

Instructional Area: Human Resources Management (HR)

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

Performance Element: Understand the role and function of human resources management to obtain a foundational knowledge of its nature and scope.
Performance Indicators:
Discuss the nature of human resources management (HR:410) (CS)
Explain the role of ethics in human resources management (HR:411) (SP)
Describe the use of technology in human resources management (HR:412) (SP)

Performance Element: Staff a business unit to satisfy work demands while adhering to budget constraints.
Performance Indicators:
Determine hiring needs (HR:353) (SU)
Screen job applications/resumes (HR:354) (SU)
Interview job applicants (HR:355) (SU)
Discuss employee compensation (HR:390) (SU)
Select and hire new employees (HR:356) (SU)
Conduct exit interviews (HR:357) (SU)
Dismiss/Fire employees (HR:358) (SU)
Maintain human resources records (HR:359) (SU)

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

Performance Indicators:

Orient new employees (HR:360) (CS)
Orient new employees (management's role) (HR:361) (SU)
Explain the role of training and human resources development (HR:362) (SU)
Explain the nature of management/supervisory training (HR:363) (SU)
Explain the nature of leadership in organizations (HR:493) (SU)
Describe ways that businesses build positive employer-employee relationships (HR:449) (SU)
Foster employee engagement and commitment (HR:513) (SU)
Coach employees (HR:364) (SU)
Recognize/Reward employees (HR:365) (SU)
Maintain ongoing discussion of issues related to compensation (HR:391) (SU)
Train staff (HR:392) (SU)
Supervise staff (HR:393) (SU)
Involve staff in company activities (HR:405) (SU)
Foster “right” environment for employees (HR:403) (SU)
Assess employee performance (HR:368) (SU)
Ensure equitable opportunities for employees (HR:367) (SU)
Assess employee performance (HR:368) (SU)
Assess team performance (HR:494) (SU)

Performance Element: Implement organizational skills to facilitate others' work efforts.

Performance Indicators:

Assist employees with prioritizing work responsibilities (HR:385) (SU)
Delegate work to others (HR:386) (SU)
Coordinate efforts of cross-functional teams to achieve project/company goals (HR:387) (SU)
Manage collaborative efforts (HR:388) (SU)
Harmonize tasks, projects, and employees in the context of business priorities (HR:389) (SU)
Coordinate human, capital, and fiscal resources to meet business priorities (HR:508) (MN)

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

Performance Indicators:

Handle employee complaints and grievances (HR:366) (SU)
Explain issues associated with the payroll process (HR:394) (SU)
Explain the nature of remedial action (HR:369) (SU)

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Instructional Area: Marketing (MK)

Standard: Understands the tools, techniques, and systems that businesses use to create exchanges and satisfy organizational objectives
Performance Element: Understand marketing's role and function in business to facilitate economic exchanges with customers.
Performance Indicators:
Explain marketing and its importance in a global economy (MK:001) (CS)
Describe marketing functions and related activities (MK:002) (CS)

Performance Element: Acquire foundational knowledge of customer/client/business behavior to understand what motivates decision-making.
Performance Indicators:
Explain factors that influence customer/client/business buying behavior (MK:014) (SP)
Discuss actions employees can take to achieve the company's desired results (MK:015) (SP)
Describe connections between company actions and results (e.g., influencing consumer buying behavior, gaining market share, etc.) (MK:019) (SP)

Instructional Area: Information Management (NF)

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

Performance Element: Use information literacy skills to increase workplace efficiency and effectiveness.
Performance Indicators:
Assess information needs (NF:077) (CS)
Obtain needed information efficiently (NF:078) (CS)
Evaluate quality and source of information (NF:079) (CS)
Draw conclusions based on information analysis (NF:278) (CS)
Apply information to accomplish a task (NF:080) (CS)
Store information for future use (NF:081) (CS)

Performance Element: Acquire a foundational knowledge of information management to understand its nature and scope.
Performance Indicators:
Discuss the nature of information management (NF:110) (CS)
Explain the role of ethics in information management (NF:111) (SP)
Explain legal issues associated with information management (NF:076) (SP)

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Performance Element: Utilize information-technology tools to manage and perform work responsibilities.
Performance Indicators:
Identify ways that technology impacts business (NF:003) (PQ)
Explain the role of information systems (NF:083) (PQ)
Discuss principles of computer systems (NF:084) (PQ)
Use basic operating systems (NF:085) (PQ)
Describe the scope of the internet (NF:086) (PQ)
Demonstrate basic email functions (NF:004) (PQ)
Demonstrate personal information management/productivity applications (NF:005) (PQ)
Demonstrate basic web-search skills (NF:006) (PQ)
Demonstrate basic word processing skills (NF:007) (PQ)
Demonstrate basic presentation applications (NF:008) (PQ)
Demonstrate basic database applications (NF:009) (PQ)
Demonstrate basic spreadsheet applications (NF:010) (PQ)
Use an integrated business software application package (NF:088) (CS)
Demonstrate collaborative/groupware applications (NF:011) (CS)
Create and post basic web page (NF:042) (CS)
Collaborate on and aggregate complex internal documents to create a common voice (NF:215) (SP)
Establish specifications for selecting hardware/software systems (NF:091) (MN)
Determine venture's information technology needs (NF:012) (MN)

Performance Element: Maintain business records to facilitate business operations.
Performance Indicators:
Describe the nature of business records (NF:001) (SP)
Maintain customer records (NF:002) (SP)

Performance Element: Acquire information to guide business decision-making.
Performance Indicators:
Describe current business trends (NF:013) (SP)
Monitor internal records for business information (NF:014) (SP)
Conduct an environmental scan to obtain business information (NF:015) (SP)
Interpret statistical findings (NF:093) (SP)
Translate research findings into actionable business recommendations (NF:216) (SP)

Performance Element: Create and access databases to acquire information for business decision-making.
Performance Indicators:
Explain the principles of data analysis (NF:139) (SP)
Explain the nature of tools that can be used to access information in the database system (NF:140) (SP)
Access information in the database system (NF:141) (SP)

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Performance Element: Apply data mining methods to acquire pertinent information for business decision-making.
Performance Indicators:
Demonstrate basic data mining techniques (NF:151) (SP)
Discuss the nature of data mining (NF:148) (CS)
Describe data mining tools and techniques (NF:149) (SP)
Discuss the importance of ethics in data mining (NF:150) (SP)
Interpret data mining findings (NF:152) (SP)

Instructional Area: Operations (OP)

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

Performance Element: Understand operation's role and function in business to value its contribution to a company.
Performance Indicators:
Explain the nature of operations (OP:189) (CS)
Discuss the role of ethics in operations (OP:190) (SP)
Describe the use of technology in operations (OP:191) (SP)

Performance Element: Adhere to health and safety regulations to support a safe work environment.
Performance Indicators:
Describe health and safety regulations in business (OP:004) (PQ)
Report noncompliance with business health and safety regulations (OP:005) (PQ)

Performance Element: Implement safety procedures to minimize loss.
Performance Indicators:
Follow instructions for use of equipment, tools, and machinery (OP:006) (PQ)
Follow safety precautions (OP:007) (PQ)
Maintain a safe work environment (OP:008) (CS)
Explain procedures for handling accidents (OP:009) (CS)
Handle and report emergency situations (OP:010) (CS)

Performance Element: Determine needed safety policies/procedures to protect employees.
Performance Indicators:
Identify potential safety issues (OP:151) (MN)
Establish safety policies and procedures (OP:012) (MN)

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Performance Element: Implement security policies/procedures to minimize chance for loss.
Performance Indicators:
Explain routine security precautions (OP:013) (CS)
Follow established security procedures/policies (OP:152) (CS)
Protect company information and intangibles (OP:153) (CS)

Performance Element: Comply with security rules, regulations, and codes (e.g., property, privacy, access, confidentiality) to protect customer and company information, reputation, and image.
Performance Indicators:
Explain information privacy, security, and confidentiality considerations in business (OP:441) (CS)
Maintain data security (OP:064) (CS)

Performance Element: Develop policies/procedures to protect workplace security.
Performance Indicators:
Identify potential security issues (OP:154) (MN)
Establish policies to protect company information and intangibles (OP:155) (MN)
Establish policies to maintain a non-hostile work environment (OP:156) (SU)
Establish policies and procedures to maintain physical security of the work environment (OP:157) (MN)

Performance Element: Acquire a foundational knowledge of project management to understand its nature and scope.
Performance Indicators:
Explain the nature of project management (OP:158) (SP)
Describe the role of ethics in project management (OP:675) (SP)

Performance Element: Utilize project management skills to improve workflow and minimize costs.
Performance Indicators:
Plan project (OP:519) (CS)
Monitor projects and take corrective actions (OP:520) (CS)
Evaluate project success (OP:521) (CS)
Identify resources needed for project (OP:003) (SP)
Develop project plan (OP:001) (SP)
Apply project-management tools to monitor and communicate project progress (OP:002) (SP)
Evaluate project results (OP:159) (SP)

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Performance Element: Implement purchasing activities to obtain business supplies, equipment, resources, and services.
Performance Indicators:
Explain the nature and scope of purchasing (OP:015) (CS)
Place orders/reorders (OP:016) (CS)
Maintain inventory of supplies (OP:031) (CS)
Discuss the importance of utilizing ethical purchasing methods (OP:246) (SP)
Explain the impact of the purchasing process on productivity (OP:247) (SP)
Manage the bid process in purchasing (OP:160) (SP)
Select vendors (OP:161) (SP)
Evaluate vendor performance (OP:162) (SP)
Establish bid specifications (OP:243) (MN)

Performance Element: Understand production's role and function in business to recognize its need in an organization.
Performance Indicators:
Explain the concept of production (OP:017) (CS)

Performance Element: Implement quality-control processes to minimize errors and to expedite workflow.
Performance Indicators:
Identify quality-control measures (OP:163) (SP)
Utilize quality control methods at work (OP:164) (SP)
Describe crucial elements of a quality culture (OP:019) (SP)
Resolve problems with suppliers' quality issues (OP:652) (SP)
Describe the role of management in the achievement of quality (OP:020) (MN)
Establish efficient operating systems (OP:022) (MN)

Performance Element: Implement expense-control strategies to enhance a business's financial wellbeing.
Performance Indicators:
Explain the nature of overhead/operating costs (OP:024) (SP)
Explain employee's role in expense control (OP:025) (SP)
Control use of supplies (OP:026) (SU)
Conduct break-even analysis (OP:192) (MN)
Negotiate service and maintenance contracts (OP:027) (MN)
Negotiate lease or purchase of facility (OP:028) (MN)
Develop expense control plans (OP:029) (MN)
Use budgets to control operations (OP:030) (MN)

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Performance Element: Implement organizational skills to improve efficiency and work flow.
Performance Indicators:
Organize and prioritize work (OP:228) (CS)
Coordinate work with that of team members (OP:230) (CS)
Coordinate activities with those of other departments (OP:196) (SP)

Performance Element: Maintain work flow to enhance productivity.
Performance Indicators:
Monitor and ensure completion of delegated tasks (OP:354) (SP)
Streamline work processes (OP:355) (SP)

Performance Element: Maintain property and equipment to facilitate ongoing business activities.
Performance Indicators:
Comply with policies and procedures for use of property and equipment (OP:442) (CS)

Performance Element: Understand supply chain management's role in business to appreciate its contributions to efficiency and profitability.
Performance Indicators:
Explain the concept of supply chain (OP:443) (CS)
Explain the benefits of supply chain collaboration (OP:444) (SP)

Instructional Area: Professional Development (PD)

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

Performance Element: Acquire self-development skills to enhance relationships and improve efficiency in the work environment.
Performance Indicators:
Maintain appropriate personal appearance (PD:002) (PQ)
Demonstrate systematic behavior (PD:009) (PQ)
Set personal goals (PD:018) (CS)
Balance personal and professional responsibilities (PD:179) (SP)

Performance Element: Understand and follow company rules and regulations to maintain employment.
Performance Indicators:
Adhere to company protocols and policies (PD:250) (CS)
Follow rules of conduct (PD:251) (CS)
Follow chain of command (PD:252) (CS)

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Performance Element: Achieve organizational goals to contribute to company growth.
Performance Indicators:
Determine the nature of organizational goals (PD:254) (SP)
Ascertain employee's role in meeting organizational goals (PD:255) (SP)
Establish performance standards to meet organizational goals (PD:256) (MN)
Monitor progress in achieving organizational goals (PD:257) (MN)

Performance Element: Utilize critical-thinking skills to determine best options/outcomes.
Performance Indicators:
Explain the need for innovation skills (PD:126) (CS)
Make decisions (PD:017) (CS)
Demonstrate problem-solving skills (PD:077) (CS)
Demonstrate appropriate creativity (PD:012) (SP)
Use time-management skills (PD:019) (SP)

Performance Element: Participate in career planning to enhance job-success potential.
Performance Indicators:
Assess personal interests and skills needed for success in business (PD:013) (PQ)
Analyze employer expectations in the business environment (PD:020) (PQ)
Explain the rights of workers (PD:021) (PQ)
Identify sources of career information (PD:022) (CS)
Identify tentative occupational interest (PD:023) (CS)
Explain employment opportunities in business (PD:025) (CS)
Explain career opportunities in entrepreneurship (PD:066) (CS)

Performance Element: Implement job-seeking skills to obtain employment.
Performance Indicators:
Utilize job-search strategies (PD:026) (PQ)
Complete a job application (PD:027) (PQ)
Interview for a job (PD:028) (PQ)
Write a follow-up letter after job interviews (PD:029) (CS)
Write a cover letter (PD:030) (CS)
Prepare a resume (PD:031) (CS)
Use networking techniques to identify employment opportunities (PD:037) (SP)

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Performance Element: Utilize career-advancement activities to enhance professional development.
Performance Indicators:
Describe techniques for obtaining work experience (e.g., volunteer activities, internships) (PD:032) (PQ)
Explain the need for ongoing education as a worker (PD:033) (PQ)
Explain possible advancement patterns for jobs (PD:034) (PQ)
Identify skills needed to enhance career progression (PD:035) (SP)
Utilize resources that can contribute to professional development (e.g., trade journals/periodicals, professional/trade associations, classes/seminars, trade shows, and mentors) (PD:036) (SP)

Instructional Area: Strategic Management (SM)

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

Performance Element: Recognize management's role to understand its contribution to business success.
Performance Indicators:
Explain the concept of management (SM:001) (CS)
Explain factors that affect management (SM:100) (SP)
Explain the nature of managerial ethics (SM:002) (MN)
Discuss the nature of balanced scorecards (SM:078) (MN)

Performance Element: Utilize planning tools to guide organization's/department's activities.
Performance Indicators:
Explain the nature of business plans (SM:007) (MN)
Develop company goals/objectives (SM:008) (ON)
Define business mission (SM:009) (ON)
Conduct an organizational SWOT (SM:010) (ON)
Explain external planning considerations (SM:011) (MN)
Identify and benchmark key performance indicators (e.g., dashboards, scorecards) (SM:027) (MN)
Develop action plans (SM:012) (ON)
Develop business plan (SM:013) (ON)

Performance Element: Control an organization's/department's activities to encourage growth and development.
Performance Indicators:
Select and apply metrics for measuring organizational success (SM:074) (MN)
Analyze operating results in relation to budget/industry (SM:005) (MN)
Track performance of business plan (SM:006) (MN)
Determine alternative actions to take when goals are not being met (SM:043) (MN)
Evaluate opportunities for potential company changes (SM:044) (MN)

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

Performance Indicators:

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

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

Identify speculative business risks (SM:077) (MN)

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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)

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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)

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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's role in business to appreciate its contributions to efficiency and profitability.
Performance Indicators:
Explain the impact of supply chains on business performance (OP:477) (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)
Discuss ethical considerations in supply chain management (OP:677) (SP)
Describe the impact of technology on supply chain management (OP:478) (SP)

Performance Element: Manage purchasing activities to obtain the best service/product at the least cost.
Performance Indicators:
Maintain vendor/supplier relationships (OP:241) (SP)
Negotiate terms with vendors in business (OP:337) (SP)

Instructional Area: Professional Development (PD)

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

Performance Element: Participate in career planning to enhance job-success potential.
Performance Indicators:
Discuss employment opportunities in business management and administration (PD:297) (CS)

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Instructional Area: Strategic Management (SM)

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

Performance Element: Recognize management's role to understand its contribution to business success.
Performance Indicators:
Discuss the nature of managerial planning (SM:063) (SP)
Explain managerial considerations in organizing (SM:064) (SP)
Describe managerial considerations in staffing (SM:065) (SP)
Discuss managerial considerations in directing (SM:066) (SP)
Describe the nature of managerial control (control process, types of control, what is controlled) (SM:004) (SP)
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) (SP)
Discuss the role of ethics in knowledge management (KM:002) (SP)
Explain the use of technology in knowledge management (KM:003) (SP)
Explain legal considerations for knowledge management (KM:004) (SP)

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Performance Element: Use knowledge management strategies to improve the performance and competitive advantage of an organization.
Performance Indicators:
Identify techniques that can be used to capture and transfer knowledge in an organization (KM:005) (SP)
Apply knowledge management processes (KM:018) (SP)

Instructional Area: Project Management (PJ)

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

Performance Element: Utilize project management skills to start, run, and end projects.
Performance Indicators:
Initiate project (PJ:005) (SP)
Prepare work breakdown structure (WBS) (PJ:006) (SP)
Execute and control projects (PJ:009) (SP)
Manage project team (PJ:007) (SP)
Manage project schedule (PJ:010) (SP)
Close project (PJ:008) (SP)

Instructional Area: Quality Management (QM)

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

Performance Element: Understand the role and function of quality management to obtain a foundational knowledge of its nature and scope.
Performance Indicators:
Explain the nature of quality management (QM:001) (SP)
Describe the nature of quality management frameworks (e.g., Six Sigma, ITIL, CMMI) (QM:002) (SP)
Discuss the need for continuous improvement of the quality process (QM:003) (SP)
Discuss ethical considerations in quality management (QM:012) (SP)

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Instructional Area: Risk Management (RM)

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

Performance Element: Acquire a foundational understanding of risk management to demonstrate knowledge of its nature and scope.
Performance Indicators:
Explain the role of ethics in risk management (RM:041) (SP)
Describe the use of technology in risk management (RM:042) (SP)
Discuss legal considerations affecting risk management (RM:043) (SP)
Describe international considerations affecting risk management (RM:092) (SP)

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)

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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)

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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 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)

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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)

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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)

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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)

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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)

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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))

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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) (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)

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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)

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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)

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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)

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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)

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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)

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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)

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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: 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)

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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)

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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)

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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)

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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)

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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)

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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: 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) (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)

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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) (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)

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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)

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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)

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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)

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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)

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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)

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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)

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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)

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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)

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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) (SP)
Determine the components of internal accounting control procedures for a business (FI:479) (SP)
Maintain internal accounting controls (FI:480) (SP)

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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

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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 procurement and operations management activities (e.g., strategic sourcing, supplier relationship management, 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)

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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 relationship between supply chain management and operations management (OP:304) (SP)
Describe supply chain management strategies (OP:305) (SP)
Use supply chain performance measures to evaluate achievement of goals (e.g., perfect order fulfillment, inventory turnover, cash-to-cash conversion cycle, fill rate) (OP:498) (SP)
Evaluate risk factors and trends affecting supply chain systems (e.g., sustainability, geopolitical volatility, cyber security, artificial intelligence, automation) (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)

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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)

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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)

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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., customs brokers, shipping agents, freight forwarders) (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, trade policies, customs regulations) (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 (e.g., Association for Supply Chain Management [ASCM], Council of Supply Chain Management Professionals [CSCMP], Certified Six Sigma Black Belt [CSSBB]) (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)

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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)

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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)

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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)

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