

Instructional Framework

Business Operations

52.0408.00

This Instructional Framework identifies, explains, and expands the content of the standards/measurement criteria, and, as well, guides the development of multiple-choice items for the Technical Skills Assessment. This document corresponds with the Technical Standards endorsed on May 25, 2022.



Domain 1: Business Operations and Procedures

Instructional Time: 40-50%

STANDARD 2.0 DEMONSTRATE THE RESPONSIBILITIES OF A BUSINESS OPERATIONS ASSISTANT

<p>2.1 Explore entry-level career opportunities in business operations (e.g., virtual assistant, customer service rep, telemarketing, receptionist, office manager, clerk, and administrative assistant)</p>	<ul style="list-style-type: none">● Entry-level career opportunities<ul style="list-style-type: none">○ Virtual assistant○ Customer service rep○ Telemarketing○ Receptionist● Office manager<ul style="list-style-type: none">○ Clerk○ Administrative assistant● Differentiate between the job functions/descriptions associated with various business positions● Career exploration<ul style="list-style-type: none">○ Job search and application
<p>2.2 Identify major skills needed by the business operations assistant (e.g., proficiency in keyboarding skills, excellent communication skills, ability to juggle multiple tasks, and strong organizational, critical thinking, and interpersonal skills)</p>	<ul style="list-style-type: none">● Proficiency in keyboarding skills<ul style="list-style-type: none">○ Typing a minimum words per minute aligned to industry○ Identification and purpose of keyboard functions● Excellent communication skills<ul style="list-style-type: none">○ Verbal, written, non-verbal● Ability to juggle multiple tasks<ul style="list-style-type: none">○ Prioritization and efficiency● Strong organizational, critical thinking, and interpersonal skills
<p>2.3 Compare and contrast management practices (i.e., to control design, implementation, and creation of products and services, etc.)</p>	<ul style="list-style-type: none">● Levels of management<ul style="list-style-type: none">○ Top/Administrative

<p>and business operations practices (i.e., to control ordering supplies, scheduling labor and use of facilities, etc.)</p>	<ul style="list-style-type: none"> ○ Middle/Executive ○ Lower/Supervisory ● Management practices <ul style="list-style-type: none"> ○ To control design, implementation, and creation of products and services ● Business operations practices <ul style="list-style-type: none"> ○ To control ordering supplies, scheduling labor and use of facilities ● 5 Functions of Management and the roles of each <ul style="list-style-type: none"> ○ Planning ○ Organizing ○ Staffing ○ Leading ○ Controlling
<p>2.4 Identify skills needed in project management (e.g., effective communication, negotiation, scheduling and time management, leadership, risk management, and critical thinking and problem solving)</p>	<ul style="list-style-type: none"> ● Basic project management process <ul style="list-style-type: none"> ○ Set goal ○ Plan ○ Do ○ Review/reflect ● Effective communication <ul style="list-style-type: none"> ○ Negotiation ● Scheduling and time management ● Leadership <ul style="list-style-type: none"> ○ Roles ○ Delegation ● Risk management ● Critical thinking and problem solving
<p>STANDARD 3.0 ESTABLISH AND ADHERE TO OFFICE PROCEDURES</p>	
<p>3.1 Explore processes/procedures to organize, retrieve, and archive physical and electronic records to ensure security and easy retrieval of information and data</p>	<ul style="list-style-type: none"> ● File security <ul style="list-style-type: none"> ○ Firewall ○ Login procedures ○ User access ○ Encryption

	<ul style="list-style-type: none"> ● File organization <ul style="list-style-type: none"> ○ File properties <ul style="list-style-type: none"> ■ Tagging ■ Titles ■ Comments ○ Sorting ○ Hierarchy ○ Collaboration/shared files
<p>3.2 Explain the established procedure for maintaining and destroying physical and electronic organizational records</p>	<ul style="list-style-type: none"> ● File management (physical and electronic) <ul style="list-style-type: none"> ○ Search and retrieval functions ○ Archiving policies ○ Retention schedule ○ File types ○ Disposal policies
<p>3.3 Explain the process and benefits of electronic and physical mailings and when to use each</p>	<ul style="list-style-type: none"> ● Purpose and benefits of electronic vs. physical mailings ● Physical mailings <ul style="list-style-type: none"> ○ Address documents for mailing <ul style="list-style-type: none"> ■ Envelope/mailer formatting ● Electronic mailings <ul style="list-style-type: none"> ○ Attachments ○ Ease of access ● Mail merge
<p>3.4 Explain notarization and medallion signature guarantees as an office function</p>	<ul style="list-style-type: none"> ● Define notarization <ul style="list-style-type: none"> ○ Purpose, function, and benefits ● Define medallion signature <ul style="list-style-type: none"> ○ Purpose, function, and benefits
<p>3.5 Demonstrate telephone etiquette and customer service skills to communicate, record, and deliver accurate messages to appropriate parties</p>	<ul style="list-style-type: none"> ● Telephone etiquette <ul style="list-style-type: none"> ○ Greeting (identify yourself) ○ Verbal cues (pitch, tone, volume) ○ Enunciation ○ Professional language

	<ul style="list-style-type: none"> ○ Placing and receiving calls <ul style="list-style-type: none"> ■ State your purpose ■ Be prepared with information ■ Assist (screen, transfer, conclude, etc.) ● Taking and leaving a message <ul style="list-style-type: none"> ○ Messaging components <ul style="list-style-type: none"> ■ Date and time of call ■ Name of caller ■ Name of caller's company or other affiliation ■ Caller's phone number ■ Detailed message ■ Message recorded ● Delivery guidelines <ul style="list-style-type: none"> ○ Determine who is calling and purpose of calls ○ Screening calls ● Situational issues and problem solving <ul style="list-style-type: none"> ○ Role play
--	---

STANDARD 4.0 PLAN AND PARTICIPATE IN VIRTUAL MEETINGS AND IN-PERSON COLLABORATIONS

<p>4.1 Prepare and assemble materials and documents for meetings (i.e., agendas, executive summaries, status updates, etc.)</p>	<ul style="list-style-type: none"> ● Meeting preparation and resources <ul style="list-style-type: none"> ○ Document preparation <ul style="list-style-type: none"> ■ Agenda ■ Executive summaries ■ Status updates ■ Attendance sheets ■ Supporting materials, etc. ○ Supplies ○ Hospitality
---	--

<p>4.2 Reserve meeting space and technology needs</p>	<ul style="list-style-type: none"> ● Meeting space and technology <ul style="list-style-type: none"> ○ In person <ul style="list-style-type: none"> ■ Booking facilities and equipment ■ Arranging for technology requirements ■ Preparing the meeting rooms for presentations and activities
---	--

	<ul style="list-style-type: none"> ○ Virtual <ul style="list-style-type: none"> ■ Technology permissions for meeting participants ■ Various online meeting platforms and their technological specifications
4.3 Document attendance, notes, and prepare meeting minutes	<ul style="list-style-type: none"> ● Meeting attendance <ul style="list-style-type: none"> ○ Forms of documentation <ul style="list-style-type: none"> ■ Google form ■ QR code ■ Sign-in sheet ■ Download attendee list ● Take notes ● Prepare meeting minutes ● Prepare related documentation ● Follow-up
4.4 Demonstrate familiarity with virtual platforms and the features and differences of each (i.e., MS Teams, Google Meets, Zoom, etc.)	<ul style="list-style-type: none"> ● Explore features and differences <ul style="list-style-type: none"> ○ Microsoft Teams ○ Google Meets ○ Zoom, etc. ● Demonstrate familiarity and role-play

Domain 2: Technology Foundations for Business

Instructional Time: 30-40%

STANDARD 1.0 UTILIZE TECHNOLOGY TOOLS TO MANAGE BUSINESS OPERATIONS

1.1 Use word processing software to create and manage documents (i.e., format text, create tables and lists, manage references including footnotes, endnotes, bibliography, and captions for figures and tables, etc.)	<ul style="list-style-type: none"> ● Toolbars ● Creating documents <ul style="list-style-type: none"> ○ Creating a new document ○ Open existing documents ● Working with templates ● Formatting text and business documents ● Creating tables <ul style="list-style-type: none"> ○ Adding /removing rows and columns
--	--

	<ul style="list-style-type: none"> ○ Formatting ● Creating lists <ul style="list-style-type: none"> ○ Bullets ○ Numbering ○ Promoting/demoting ● Table of contents ● Inserting images from different locations <ul style="list-style-type: none"> ○ Formatting images/graphics ● Managing references including citations, footnotes, endnotes, bibliography, captions for figures and tables ● Save vs. Save As ● Application integration
<p>1.2 Use spreadsheet software to create and manage worksheets and workbooks (e.g., determine print area, cells, ranges, tables, and charts; and perform operations using formulas and functions)</p>	<ul style="list-style-type: none"> ● Creating new workbooks, worksheets, and navigation ● Cells and ranges <ul style="list-style-type: none"> ○ Formatting cells ● Perform operations using formulas and functions <ul style="list-style-type: none"> ○ Basic functions (SUM, AVG, MIN, MAX, COUNT) ○ Cell references including: <ul style="list-style-type: none"> ■ Absolute vs. relative ○ AutoFill ● Creating and managing pivot tables ● Creating tables and charts <ul style="list-style-type: none"> ○ Understanding the data ● Managing objects ● Print formatting and scaling <ul style="list-style-type: none"> ○ Determine print area ● Application integration
<p>1.3 Use database software functions and procedures to create tables, forms, reports, and queries</p>	<ul style="list-style-type: none"> ● Adding and formatting fields <ul style="list-style-type: none"> ○ Field size and format ● Creating new forms <ul style="list-style-type: none"> ○ Form design ● Data entry <ul style="list-style-type: none"> ○ Importing data ● Maintaining records

	<ul style="list-style-type: none"> ● Identify queries to view specific records <ul style="list-style-type: none"> ○ Sort and find ● Creating functional reports from the database <ul style="list-style-type: none"> ○ Formatting reports ● Differentiating between tables and fields <ul style="list-style-type: none"> ○ Table design ● Application integration <ul style="list-style-type: none"> ○ Application relationships ○ Example- mail merge
<p>1.4 Use presentation software (i.e., PowerPoint, MS Publisher, Google Slides, Prezi, Canva, Adobe Slate, etc.) to create and manage presentations (i.e., format text, customize graphics, insert tables: develop charts, graphics, and media; apply transitions, animations, timing, etc.)</p>	<ul style="list-style-type: none"> ● Presentation software <ul style="list-style-type: none"> ○ PowerPoint ○ MS Publisher ○ Google Slides ○ Prezi ○ Canva ○ Adobe Slate ● Creating presentations <ul style="list-style-type: none"> ○ Creating a new presentation ○ Opening existing presentations ○ Opening from a template ○ Themes/layouts ○ Creating new slides ● Placeholder <ul style="list-style-type: none"> ○ Format text ● Toolbars, ribbons, tabs ● Inserting images from various sources ● Formatting images/graphics <ul style="list-style-type: none"> ○ Toolbars associated with graphics ○ Image quality and compression ○ Image source and copyright ● Creating tables <ul style="list-style-type: none"> ○ Adding/removing rows and columns ○ Formatting ○ Creating charts ● Creating/inserting media <ul style="list-style-type: none"> ○ Audio and music ○ Video and online sources

	<ul style="list-style-type: none"> ● Options for: <ul style="list-style-type: none"> ○ Transitions ○ Animations ○ Timing ● Professional purpose and intention of presentation <ul style="list-style-type: none"> ○ Audience ○ Method of delivery ● Merging multiple presentations
<p>1.5 Use communication software and web-based tools to create, send, and manage messages, calendars, contacts, groups, and to conduct meetings (i.e., Microsoft, Google, etc.)</p>	<ul style="list-style-type: none"> ● Communication software and applications <ul style="list-style-type: none"> ○ Microsoft ○ Google ○ Video conferencing (i.e., WebEx, Zoom, Google Meet, Skype, etc.) <ul style="list-style-type: none"> ■ Video conferencing etiquette <ul style="list-style-type: none"> ● Body language ● Professional dress ● Setting ○ Smartphones and other devices ● Account information <ul style="list-style-type: none"> ○ Manage settings ● Create and manage contacts and groups ● Formatting messages <ul style="list-style-type: none"> ○ Reply, Reply All, Forward ○ Cc, Bcc ● E-mail etiquette ● Creating folders ● Calendar set-up <ul style="list-style-type: none"> ○ Create appointments and meetings ○ Manage multiple calendars
<p>1.6 Follow procedures to organize and maintain electronic files locally and on network drives and shared drives</p>	<ul style="list-style-type: none"> ● File storage <ul style="list-style-type: none"> ○ Server ○ Hard Drive ○ External drive, etc.

	<ul style="list-style-type: none"> ● File Management <ul style="list-style-type: none"> ○ Create folders and subfolders <ul style="list-style-type: none"> ■ Subject ■ Geographic ■ Chronological ■ Numerical ■ Name ● Drag and Drop vs. Cut/Copy and Paste
STANDARD 7.0 DEMONSTRATE PROFICIENCY IN NAVIGATING THE INTERNET	
<p>7.1 Characterize URLs (Universal Resource Locators) and associated protocols (e.g., .com, .org, .edu, .gov, .net, and .mil) to access systems, obtain information, and exchange files and messages</p>	<ul style="list-style-type: none"> ● Identify URLs and associated protocols <ul style="list-style-type: none"> ○ .com ○ .org ○ .edu ○ .gov ○ .net ○ .mil ● Differentiate common usage of top-level domains ● Secure encryption <ul style="list-style-type: none"> ○ Obtain information and exchange files
<p>7.2 Use internet search engines to find information or other websites (i.e., Google, Yahoo, Bing, etc.)</p>	<ul style="list-style-type: none"> ● Explore internet search engines <ul style="list-style-type: none"> ○ Google ○ Yahoo ○ Bing, etc. ● Apply operators to filter search results <ul style="list-style-type: none"> ○ " " ○ And ○ Or ○ Not ○ Wild cards like *, etc. ● Identifying reliable sources <ul style="list-style-type: none"> ○ Determine credibility
<p>7.3 Explain the three main types of search engines (e.g., web crawlers, directories, and sponsored links)</p>	<ul style="list-style-type: none"> ● List functions and features of search engine types <ul style="list-style-type: none"> ○ Web crawlers

	<ul style="list-style-type: none"> ○ Directories ○ Sponsored links
7.4 Compare and contrast methods of online storage and transfer of files (ftp) (e.g., Dropbox, iCloud Drive, Microsoft OneDrive, and Google Drive)	<ul style="list-style-type: none"> ● Identify and differentiate between different cloud storage applications <ul style="list-style-type: none"> ○ Dropbox ○ iCloud Drive ○ Microsoft OneDrive ○ Google Drive ● Explore the benefits and usage options of online storage and transfer of files <ul style="list-style-type: none"> ○ Security ○ Storage limits and costs
STANDARD 8.0 DEMONSTRATE ETHICAL STANDARDS AND SAFETY POLICIES IN THE WORKPLACE	
8.1 Distinguish between conflict of interest and intellectual property	<ul style="list-style-type: none"> ● Determine conflict of interest <ul style="list-style-type: none"> ○ Analyze situations ● Explain intellectual property rights <ul style="list-style-type: none"> ○ Fair Use ○ Copyright ○ Trademarks ○ Patents
8.2 Differentiate between confidential and privileged information	<ul style="list-style-type: none"> ● Legal ramifications of exposing confidential/privileged information <ul style="list-style-type: none"> ○ Acceptable use guidelines ○ Data protection policies ○ Confidentiality agreements <ul style="list-style-type: none"> ■ Non-compete clause ○ Application sharing permissions ● Effects on company culture, reputation, and customers <ul style="list-style-type: none"> ○ Public relations policies ○ Company social media policies

<p>8.3 Explain copyright infringement as an ethical issue</p>	<ul style="list-style-type: none"> ● Explore ethical issues arising from copyright infringements <ul style="list-style-type: none"> ○ First Amendment ○ Proprietary Information/Intellectual property ○ Piracy/theft and legal consequences ○ Licensing agreements ○ Attribution/citing sources
<p>8.4 Define “misappropriation of company assets” (e.g., the misuse of company resources such as time, materials, supplies, equipment, information, intellectual property, electronic mail, and computer systems)</p>	<ul style="list-style-type: none"> ● Acceptable use guidelines ● Identify and describe the misuse of company resources <ul style="list-style-type: none"> ○ Time appropriation ○ Materials/supplies ○ Equipment/vehicles ○ Information/Intellectual property ○ Technology <ul style="list-style-type: none"> ■ Electronic mail/computer systems/social media ■ Devices ● Company policy on monitoring assets ● Personal vs. professional ethics
<p>8.5 Identify standard safety precautions in the workplace (i.e., OSHA regulations, posting caution signs, use of fire extinguishers, first aid stations, etc.)</p>	<ul style="list-style-type: none"> ● Identify standard safety precautions <ul style="list-style-type: none"> ○ OSHA regulations ○ Posting caution signs ○ Use of fire extinguishers ○ First aid stations/training ○ Licensing, permits ○ Business code compliance, etc.
<p>8.6 Explain ergonomic injuries in business operations occupations (i.e., carpal tunnel syndrome, tendinitis, muscle strain, lower back injuries, etc.)</p>	<ul style="list-style-type: none"> ● Explain correct/suggested ergonomic positioning ● Identify ergonomic injuries <ul style="list-style-type: none"> ○ Carpal tunnel syndrome ○ Tendinitis ○ Muscle strain ○ Lower back injuries, etc.

<p>8.7 Explain the effect of diversity and inclusion standards in the workplace (i.e., more diversity to leadership, builds relationships, acknowledges cultural values, accepts different perspectives, etc.)</p>	<ul style="list-style-type: none"> ● Explain the effect of diversity in the workplace <ul style="list-style-type: none"> ○ More diversity to leadership ○ Cultural etiquette ○ Age, race, gender, disabilities, religion, and other characteristics ● Explain the effect of inclusion standards in the workplace <ul style="list-style-type: none"> ○ Acknowledges cultural values ○ Personality types/communication style/leadership style ● Accept different perspectives ● Builds relationships, etc.
--	---

Domain 3: Business Finance and Management
Instructional Time: 10-20%

STANDARD 5.0 PREPARE TRAVEL ARRANGEMENTS

<p>5.1 Select suitable lodging and transportation according to company policy</p>	<ul style="list-style-type: none"> ● Analyze various booking resources ● Compare suitable lodging and transportation for intended purpose of travel <ul style="list-style-type: none"> ○ Lodging <ul style="list-style-type: none"> ■ Conference recommended hotels ○ Transportation <ul style="list-style-type: none"> ■ Forms of transportation <ul style="list-style-type: none"> ● Air travel, company car, rental car, etc. ● Compare a variety of company policies <ul style="list-style-type: none"> ○ Method of payment <ul style="list-style-type: none"> ■ Purchase order, company card, reimbursement ○ Per diem/allowable expenses
<p>5.2 Research domestic/international time zones, customs, and currency exchange rates for traveler</p>	<ul style="list-style-type: none"> ● Identify resources for currency exchange rates ● Compare domestic and international time zones ● Research customs <ul style="list-style-type: none"> ○ TSA/airline requirements ○ Country entrance requirements

<p>5.3 Plan travel and meeting itinerary according to company policy including electronics, accessories, and travel documents</p>	<ul style="list-style-type: none"> ● Develop an itinerary including dates, times, and activities according to company policy ● International travel requirements <ul style="list-style-type: none"> ○ TSA/airline requirements ○ Country entrance requirements <ul style="list-style-type: none"> ■ Travel documents (ex. passport, visa, permits and/or fees, etc.) ● Appropriate scheduling of travel events ● International business travel best practices <ul style="list-style-type: none"> ○ Electronics ○ Accessories (power converters, etc.)
<p>5.4 Prepare travel claims and post travel for reimbursement to traveler according to company policy</p>	<ul style="list-style-type: none"> ● Prepare post-travel claims and reimbursement documentation according to company policy <ul style="list-style-type: none"> ○ Receipts for lodging, transportation, meals and misc. expenses ○ Expense report
<p>STANDARD 6.0 MANAGE CASH AND BANKING PROCEDURES</p>	
<p>6.1 Manage and reconcile petty cash following company procedures</p>	<ul style="list-style-type: none"> ● Follow petty cash and banking procedures as outlined in company policy ● Petty cash procedures: <ul style="list-style-type: none"> ○ Establishing funds ○ Making payments ○ Keeping records ○ Reconciling ○ Replenishing funds
<p>6.2 Explain the connection of the accounting ledger to the balance sheet to the income statement transaction</p>	<ul style="list-style-type: none"> ● Explain the connection between balance sheets and ledgers <ul style="list-style-type: none"> ○ Identify ledger components <ul style="list-style-type: none"> ■ Revenue ■ Expenses ■ Debits ■ Credits

	<ul style="list-style-type: none"> ○ Identify balance sheet components <ul style="list-style-type: none"> ■ Assets ■ Liabilities ■ Owners' equity ○ Explore income statement transactions <ul style="list-style-type: none"> ■ Net profit or loss
6.3 Prepare a bank deposit according to a business's procedures for making deposits	<ul style="list-style-type: none"> ● Prepare a business deposit slip <ul style="list-style-type: none"> ○ Carbon copy ○ Record in register ● Identify parts of a deposit slip ● Appropriate endorsements ● Accurately tally and reconcile receipts for a bank deposit according to procedures
6.4 Identify business payment options (e.g., credit card, pcard, checks, and electronic transfers)	<ul style="list-style-type: none"> ● Forms of business payment options <ul style="list-style-type: none"> ○ Credit card ○ Pcard ○ Checks ○ Electronic transfers/ Peer-to-Peer (P2P) ○ Purchase order
6.5 Review a business's procedure for cash transactions	<ul style="list-style-type: none"> ● List a business's procedure for cash transactions <ul style="list-style-type: none"> ○ Petty cash ○ Receipts ○ Reconciliation ○ Reimbursement ○ Check writing