

# EASTERN ARIZONA COLLEGE

## The Office Professional

Course Design

2016-2017

### Course Information

**Division** Business  
**Course Number** AIS 214  
**Title** The Office Professional  
**Credits** 3  
**Developed by** Tammy Campbell  
**Lecture/Lab Ratio** 3 Lecture/0 Lab

### Transfer Status

ASU	NAU	UA
Non Transferable	Elective Credit	Non Transferable

**Activity Course** No  
**CIP Code** 52.0400  
**Assessment Mode** Pre/Post Test (64 Questions/128 Points)  
**Semester Taught** Fall and Spring  
**GE Category** None  
**Separate Lab** No  
**Awareness Course** No  
**Intensive Writing Course** No

### Prerequisites

None

### Educational Value

- TO GENERAL EDUCATION: Develops skills in planning, decision-making, organizing, and prioritizing.
- TO MAJOR/PROGRAM: Enhances employability by developing and refining techniques of proper office skills and procedures.
- OTHER: Provides professional knowledge and skills helpful in other curricula.

### Description

Study and application of office procedures, skills, and responsibilities that reflect the technological changes, global influences and professionalism of the 21<sup>st</sup> century office professional. Students will learn to be productive team members, behave ethically, process information via technology, communicate effectively, prepare travel, meeting, and financial documents, lead and supervise others.

### Supplies

None

## **Competencies and Performance Standards**

### **1. Explain the changing and challenging office.**

#### **Learning objectives**

*What you will learn as you master the competency:*

- a. Describe the purpose of a company mission statement.
- b. Explain the purpose of a company code of ethics.
- c. Define and explain the classifications of authority.
- d. Explain the importance of developing a good working relationship with your manager.
- e. Explain the role of the office professional.
- f. Identify common office support functions.
- g. Define the elements of appropriate ergonomic design in the workplace.

#### **Performance Standards**

*Competence will be demonstrated:*

- o by participating in class discussions
- o in the completion of assignments from activities manual
- o in the completion of a unit test

*Criteria - Performance will be satisfactory when:*

- o learner describes the purpose of a company mission statement
- o learner explains the purpose of a company code of ethics
- o learner defines and explains the classifications of authority
- o learner explains the importance of developing a good working relationship with his/her manager
- o learner explains the role of the office professional
- o learner identifies common office support functions
- o learner defines the elements of appropriate ergonomic design in the workplace

### **2. Examine human relations in the workplace.**

#### **Learning objectives**

*What you will learn as you master the competency:*

- a. Describe the five basic workplace skills office professionals need to be successful.
- b. Describe the basic knowledge skills office professionals need in the workplace.
- c. Describe the ten personal qualities needed in the workplace.
- d. Describe the eleven interpersonal skills needed in the workplace.
- e. Describe how to display ethical behavior in the workplace.
- f. List the human relations questions you should ask yourself before considering international employment.

#### **Performance Standards**

*Competence will be demonstrated:*

- o by participating in class discussions
- o in the completion of assignments from activities manual
- o in the completion of unit tests

*Criteria - Performance will be satisfactory when:*

- o learner describes the five basic workplace skills an office professional needs to be

successful

- o learner describes the basic knowledge skills an office professional needs in the workplace
- o learner describes the ten personal qualities needed in the workplace
- o learner describes the eleven interpersonal skills needed in the workplace
- o learner describes how to display ethical behavior in the workplace
- o learner lists the human relations questions he/she should ask himself/herself before considering international employment

### **3. Articulate important steps in the employment process.**

#### ***Learning objectives***

*What you will learn as you master the competency:*

- a. Identify sources for locating employment opportunities.
- b. Complete a self-assessment inventory.
- c. Describe the significance of practicing ethical behavior during the job search.
- d. Prepare a résumé.
- e. Prepare a cover letter.
- f. Complete an employment application form.
- g. Prepare for an interview.
- h. Compose the following letters: thank-you, reminder, inquiry, acceptance, and refusal.
- i. Apply decision-making skills to the job search process.

#### ***Performance Standards***

*Competence will be demonstrated:*

- o by participating in class discussions
- o in the completion of assignments from the activities manual
- o in the completion of unit tests

*Criteria - Performance will be satisfactory when:*

- o learner identifies sources for locating employment opportunities
- o learner completes a self-assessment inventory
- o learner describes the significance of practicing ethical behavior during the job search
- o learner prepares a résumé
- o learner prepares a cover letter
- o learner completes an employment application form
- o learner prepares for an interview
- o learner composes the following letters: thank-you, reminder, inquiry, acceptance, and refusal
- o learner applies decision-making skills to the job search process

### **4. Manage work, time, and other resources.**

#### ***Learning objectives***

*What you will learn as you master the competency:*

- a. Manage resources, applying the self-management concept.
- b. Explain the difference between working efficiently and working effectively.

- c. Describe at least eight tools and strategies to follow to establish your own work habits.
- d. Describe at least five ways to organize the office supplies and your work station.
- e. Identify at least five ways to cope with stress.
- f. Discuss the principles of ethical conduct regarding your work, time, and other resources.

**Performance Standards**

*Competence will be demonstrated:*

- o by participating in class discussions
- o in the completion of assignments from the activities manual
- o in the completion of unit tests

*Criteria - Performance will be satisfactory when:*

- o learner manages resources, applying the self-management concept
- o learner explains the difference between working efficiently and working effectively
- o learner describes at least eight tools and strategies to follow to establish their own work habits
- o learner describes at least five ways to organize the office supplies and his/her workstation
- o learner identifies at least five ways to cope with stress
- o learner discusses the principles of ethical conduct regarding their work, time, and other resources

**5. Communicate by telephone.**

**Learning objectives**

*What you will learn as you master the competency:*

- a. Demonstrate the communication skills needed for effective use of the telephone.
- b. Identify ways to make productive telephone calls.
- c. Describe ways to demonstrate professionalism when receiving telephone calls.
- d. List six effective telephone techniques.
- e. Identify ways for making best use of voice mail.
- f. Explain ethical issues regarding the telephone.
- g. Explain how to troubleshoot problems when making international calls.

**Performance Standards**

*Competence will be demonstrated:*

- o by participating in class discussions
- o in the completion of assignments from the activities manual
- o in the completion of unit tests

*Criteria - Performance will be satisfactory when:*

- o learner demonstrates the communication skills needed for effective use of the telephone
- o learner identifies ways to make productive telephone calls
- o learner describes ways to demonstrate professionalism when receiving telephone calls
- o learner lists six effective telephone techniques
- o learner identifies ways for making best use of voice mail
- o learner explains ethical issues regarding the telephone
- o learner explains how to troubleshoot problems when making international calls

## 6. Build communication skills.

### **Learning objectives**

*What you will learn as you master the competency:*

- a. Discuss the communication process and explain the importance of communication.
- b. Discuss various communication methods and how to overcome barriers to the communication process.
- c. Discuss the various types of written communication for which an office professional should develop excellent writing skills.
- d. Discuss how to prepare routine communications for distribution.
- e. Discuss the importance of demonstrating ethics through your writing.
- f. Explain how to address international envelopes and write letters.

### **Performance Standards**

*Competence will be demonstrated:*

- o by participating in class discussions
- o in the completion of assignments from activities manual
- o in the completion of unit tests

*Criteria - Performance will be satisfactory when:*

- o learner discusses the communication process and explains the importance of communication
- o learner discusses various communication methods and how to overcome barriers to the communication process
- o learner discusses the various types of written communication for which an office professional should develop excellent writing skills
- o learner discusses how to prepare routine communications for distribution
- o learner discusses the importance of demonstrating ethics through his/her writing
- o learner explains how to address international envelopes and write letters

## 7. Process mail.

### **Learning objectives**

*What you will learn as you master the competency:*

- a. Explain employer's concern for misconduct in using e-mail.
- b. Identify at least five e-mail "netiquette" rules to follow.
- c. Discuss the impact systems knowledge related to mail operations has on a company.
- d. Identify ten steps in handling traditional incoming mail.
- e. Describe four steps in preparing items to be mailed.
- f. Distinguish among classes of domestic mail.
- g. Distinguish among the various international mail services.
- h. Describe the basic procedures to follow when using a postage meter.
- i. Describe the general procedures for sending a fax message.
- j. Describe at least five tips for making the copy process efficient and economical.

### **Performance Standards**

*Competence will be demonstrated:*

- o by participating in class discussions
- o in the completion of assignments from activities manual

- o in the completion of unit tests

*Criteria - Performance will be satisfactory when:*

- o learner explains employer's concern for misconduct in using e-mail
- o learner identifies at least five e-mail "netiquette" rules to follow
- o learner discusses the impact systems knowledge related to mail operations has on a company
- o learner identifies ten steps in handling traditional incoming mail
- o learner describes four steps in preparing items to be mailed
- o learner identifies at least five e-mail "netiquette" rules to follow
- o learner distinguishes among the various international mail services
- o learner describes the basic procedures to follow when using a postage meter
- o learner describes the general procedures for sending a fax message
- o learner describes at least five tips for making the copy process efficient and economical

## **8. Explore records management.**

### ***Learning objectives***

*What you will learn as you master the competency:*

- a. Discuss how records management works as a system.
- b. Define the categories of records.
- c. Distinguish among the filing systems.
- d. Describe filing supplies and equipment needed.
- e. Index and alphabetize personal, business names, and governmental and political designations.
- f. Explain the steps in preparing paper records for filing.
- g. Discuss methods for tracking paper files.
- h. List tips for organizing electronic files.
- i. Identify storage media for backing up electronic files.
- j. Describe the guidelines for records retention and transfer.
- k. Describe the ethical issues in records.

### ***Performance Standards***

*Competence will be demonstrated:*

- o by participating in class discussions
- o in the completion of assignments from activities manual
- o in the completion of unit tests

*Criteria - Performance will be satisfactory when:*

- o learner discusses how records management works as a system
- o learner defines the categories of records
- o learner distinguishes among the filing systems
- o learner describes filing supplies and equipment needed
- o learner indexes and alphabetizes personal, business names, and governmental and political designations
- o learner explains the steps in preparing paper records for filing
- o learner lists tips for organizing electronic files

- o learner identifies storage media for backing up electronic files
- o learner describes the guidelines for records retention and transfer
- o learner describes ethical issues in records

## 9. Handle financial procedures.

### **Learning objectives**

*What you will learn as you master the competency:*

- a. Identify and explain the use of a cashier's check, bank draft, bank money order, and traveler's check.
- b. Identify the various ways funds are transferred electronically.
- c. Prepare checks, make stop-payment notification, and endorse checks.
- d. Reconcile a bank statement.
- e. Describe what a petty cash fund is and how it is used.
- f. Calculate a weekly payroll on a payroll register.
- g. Explain the parts of an income statement and balance sheet.
- h. Explain the budgeting process.
- i. Keep an inventory of supplies and order supplies as needed.
- j. Discuss the importance of demonstrating ethical conduct in financial matters.
- k. Demonstrate how to change U.S. dollars to foreign money using currency exchange rates.

### **Performance Standards**

*Competence will be demonstrated:*

- o by participating in class discussions
- o in the completion of assignments from activities manual
- o in the completion of unit tests

*Criteria - Performance will be satisfactory when:*

- o learner identifies and explains the use of a cashier's check, bank draft, bank money order, and traveler's check
- o learner identifies the various ways funds are transferred electronically
- o learner prepares checks, makes stop-payment notification, and endorses checks
- o learner reconciles a bank statement
- o learner describes what a petty cash fund is and how it is used
- o learner describes what a petty cash fund is and how it is used
- o learner calculates a weekly payroll on a payroll register
- o learner explains the parts of an income statement and balance sheet
- o learner explains the budgeting process
- o learner keeps an inventory of supplies and orders supplies as needed
- o learner demonstrates how to change U.S. dollars to foreign money using currency exchange rates
- o learner discusses the importance of demonstrating ethical conduct in financial matters

**10. Schedule appointments and review procedures for receiving visitors.**

***Learning objectives***

*What you will learn as you master the competency:*

- a. Schedule and confirm appointments for one or more managers.
- b. Use appropriate scheduling aids.
- c. Greet and direct visitors.
- d. Manage difficult visitors.
- e. Identify potential ethical implications when sharing information.
- f. Host international visitors.

***Performance Standards***

*Competence will be demonstrated:*

- o by participating in class discussions
- o in the completion of assignments from activities manual
- o in the completion of unit tests

*Criteria - Performance will be satisfactory when:*

- o learner schedules and confirms appointments for one or more managers
- o learner uses appropriate scheduling aids
- o learner greets and directs visitors
- o learner manages difficult visitors
- o learner identifies potential ethical implications when sharing information
- o learner hosts international visitors

**11. Make travel arrangements.**

***Learning objectives***

*What you will learn as you master the competency:*

- a. Identify types of services and resources needed to make domestic and international travel arrangements.
- b. Prepare for a business trip.
- c. Make air and hotel reservations.
- d. Make special arrangements for international travel.
- e. Develop an overall trip plan that includes details to be handled before a trip, during a trip, and at the conclusion of a trip.
- f. Identify ethical issues in reporting travel expense reports.
- g. Discuss the importance of understanding cultural differences as they relate to your manager's travel.

***Performance Standards***

*Competence will be demonstrated:*

- o by participating in class discussions
- o in the completion of assignments from activities manual
- o in the completion of unit tests

*Criteria - Performance will be satisfactory when:*

- o learner identifies types of services and resources needed to make domestic and international travel arrangements
- o learner prepares for a business trip



- o learner understands the steps to make air and hotel reservations
- o learner understands the steps to make special arrangements for international travel
- o learner develops an overall trip plan that includes details to be handled before a trip, during a trip, and at the conclusion of a trip
- o learner identifies ethical issues in reporting travel expense reports
- o learner discusses the importance of understanding cultural differences as they relate to their manager's travel

## 12. Plan meetings and conferences.

### **Learning objectives**

*What you will learn as you master the competency:*

- a. Follow procedures to prepare for a business meeting.
- b. Prepare a checklist of activities to be completed before, during, and after the meeting.
- c. Identify the structure and procedures used in team meetings.
- d. Identify the most common forms of electronic meetings.
- e. Discuss ethics as it relates to meetings.
- f. Identify the additional responsibilities required to plan an international meeting.

### **Performance Standards**

*Competence will be demonstrated:*

- o by participating in class discussions
- o in the completion of assignments from activities manual
- o in the completion of unit tests

*Criteria - Performance will be satisfactory when:*

- o learner follows procedures to prepare for a business meeting
- o learner prepares a checklist of activities to be completed before, during, and after the meeting
- o learner identifies the structure and procedures used in team meetings
- o learner identifies the most common forms of electronic meetings
- o learner discusses ethics as it relates to meetings
- o learner identifies the additional responsibilities required to plan an international meeting

## 13. Develop effective oral presentations.

### **Learning objectives**

*What you will learn as you master the competency:*

- a. Explain the importance of identifying your purpose for a presentation.
- b. List the points necessary to organize the content of your presentation.
- c. Discuss how to organize the content of your presentation.
- d. Discuss the various ways you can structure your presentation.
- e. Discuss delivery techniques before, during, and after your presentation.
- f. Discuss how to conquer fear when making presentations.
- g. Discuss the importance of ethics in speaking.
- h. Identify various areas you should research before speaking to a diverse audience.

### **Performance Standards**

*Competence will be demonstrated:*

- by participating in class discussions
- in the completion of assignments from activities manual
- in the completion of unit tests

*Criteria - Performance will be satisfactory when:*

- learner explains the importance of identifying his/her purpose for a presentation
- learner lists the points necessary to organize the content of his/her presentation
- learner discusses how to organize the content of his/her presentations
- learner discusses the various ways he/she can structure his/her presentation
- learner discusses delivery techniques before, during, and after his/her presentation
- learner discusses how to conquer fear when making presentations
- learner discusses the importance of ethics in speaking
- learner identifies various areas he/she should research before speaking to a diverse audience

## **14. Prepare to meet the challenges.**

### **Learning objectives**

*What you will learn as you master the competency:*

- a. Identify strategies for advancement.
- b. Describe leadership qualities.
- c. Describe how values relate to ethics.
- d. Identify associations available to office professionals.
- e. Identify certifications offered to office professionals.
- f. Develop a strategy for professional development.

### **Performance Standards**

*Competence will be demonstrated:*

- by participating in class discussions
- in the completion of assignments from activities manual
- in the completion of unit tests

*Criteria - Performance will be satisfactory when:*

- learner identifies strategies for advancement
- learner describes leadership qualities
- learner describes how values relate to ethics
- learner identifies associations available to office professionals
- learner identifies certifications offered to office professionals
- learner develops a strategy for professional development

## **15. Design a monthly newsletter.**

### **Learning objectives**

*What you will learn as you master the competency:*

- a. Create a monthly newsletter.
- b. Choose appropriate articles.

- c. Determine suitable layout.
- d. Apply computer skills in printing newsletter.

**Performance Standards**

*Competence will be demonstrated:*

- o in the completion of newsletter

*Criteria - Performance will be satisfactory when:*

- o learner creates a monthly newsletter
- o learner chooses appropriate articles
- o learner determines suitable layout
- o learner applies computer skills in printing newsletter

**Types of Instruction**

Internet based presentation using WebStudy

Simulated work experience

**Grading Information**

**Grading Rationale**

Exams = 40%

Assignments = 50%

Final (Post Test) = 10%

**Grading Scale**

A	90-100%
B	80-89%
C	70-79%
D	60-69%
F	Below 59%