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**

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<th>NAU</th>
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<td>Non Transferable</td>
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**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**

A. TO GENERAL EDUCATION: Develops skills in planning, decision-making, organizing, and prioritizing.

B. TO MAJOR/PROGRAM: Enhances employability by developing and refining techniques of proper office skills and procedures.

C. 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 21st 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
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:
- 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 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 workstation.

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:*

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

**Criteria - Performance will be satisfactory when:**

- learner manages resources, applying the self-management concept
- learner explains the difference between working efficiently and working effectively
- learner describes at least eight tools and strategies to follow to establish their own work habits
- learner describes at least five ways to organize the office supplies and his/her workstation
- learner identifies at least five ways to cope with stress
- 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:*

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

**Criteria - Performance will be satisfactory when:**

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

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

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

- 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 and explains the use of a cashier’s check, bank draft, bank money order, and traveler’s check

- learner identifies the various ways funds are transferred electronically

- learner prepares checks, makes stop-payment notification, and endorses checks

- learner reconciles a bank statement

- learner describes what a petty cash fund is and how it is used

- learner describes what a petty cash fund is and how it is used

- learner calculates a weekly payroll on a payroll register

- learner explains the parts of an income statement and balance sheet

- learner explains the budgeting process

- learner keeps an inventory of supplies and orders supplies as needed

- learner demonstrates how to change U.S. dollars to foreign money using currency exchange rates

- 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:
- 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 schedules and confirms appointments for one or more managers
- learner uses appropriate scheduling aids
- learner greets and directs visitors
- learner manages difficult visitors
- learner identifies potential ethical implications when sharing information
- 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:
- 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 types of services and resources needed to make domestic and international travel arrangements
- learner prepares for a business trip
learner understands the steps to make air and hotel reservations
learner understands the steps to make special arrangements for international travel
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
learner identifies ethical issues in reporting travel expense reports
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:*

- 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 follows procedures to prepare for a business meeting
- learner prepares a checklist of activities to be completed before, during, and after the meeting
- learner identifies the structure and procedures used in team meetings
- learner identifies the most common forms of electronic meetings
- learner discusses ethics as it relates to meetings
- 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:
- Identify strategies for advancement.
- Describe leadership qualities.
- Describe how values relate to ethics.
- Identify associations available to office professionals.
- Identify certifications offered to office professionals.
- 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:
- Create a monthly newsletter.
- Choose appropriate articles.
c. Determine suitable layout.
d. Apply computer skills in printing newsletter.

**Performance Standards**

*Competence will be demonstrated:*

- in the completion of newsletter

*Criteria - Performance will be satisfactory when:*

- learner creates a monthly newsletter
- learner chooses appropriate articles
- learner determines suitable layout
- 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**

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