

**Course Syllabus**

**5th Period - Introduction to Finance**

**Instructor:** H. Jordon L. Mounts

Contact Information:

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**Classroom Media:**

Foundations of Financial Literacy – 11th Edition (Campbell & Dansby) G-W Publishers

MBA Research Online

**Course Description**

This course is designed to develop student understanding and skills essential to become a financially capable consumer. Emphasis is placed on Career Exploration of Finance Careers and skill development necessary for those careers. Students utilize problem-solving techniques and participate in hands-on activities to develop an understanding of course concepts. Teachers should provide each student with real-world learning opportunities and instruction. Students are encouraged to become active members of student organizations, DECA or FBLA. The West Virginia Standards for Global 21 Learning include the following components: Global 21 Content, Literacy and Numeracy, Entrepreneurship, and Technology Standards. All West Virginia teachers are responsible for classroom instruction that integrates learning skills, technology tools, and content standards and objectives.

**BASIC ACCOUNTING KNOWLEDGE & SKILLS**

**1470.10 Demonstrate ability to use calculator, 10-key, and computer**

**TEXT: Calculators Printing & Display**

These assignments will be worked on daily until completed (20 minutes on calculator skills and the 20 minutes on other standards and assignments.)

Job 1—Addition Touch Method

Pages 1 through 6

**Job Specific Goal:** Students will be learning to use the touch method to enter the numbers 4, 5, and 6 on the calculator and learning the correct entry of keys to complete addition problems.

**Job Specific Goal:** Students will need to go through this lesson on 2 different days in order to become proficient with the touch method.

Job 2—Addition Touch Method

Pages 7 through 10

**Job Specific Goal:** Students will be learning to use the touch method to enter the numbers 7, 8, 9, and 0 on the calculator and learning the correct entry of keys to complete addition problems.

**Job Specific Goal:** Students will need to go through this lesson on 2 different days in order to become proficient with the touch method.

Job 3—Ten Key Numeric Drill

Pages 11 through 14

**Job Specific Goal:** Students will continue to learn to use the touch method to enter the numbers on the calculator, increase accuracy rate, and increase speed.

**Job Specific Goal:** Students will need to go through this lesson on 2 different days in order to become proficient with the touch method.

Job 4--Subtraction

Pages 15 and 16

**Job Specific Goal:** Students will use the touch method to solve subtractions problems.

Job 5--Review

Pages 17 and 18

**Job Specific Goal:** Students will review addition and subtraction using the touch method.

**Job Specific Goal:** Students will continue to work on increasing accuracy and speed.

Job 6—Non-Add Key, Decimal Point Key, Add Mode Decimals, Subtotal

Pages 19 through 22

**Job Specific Goal:** Students will use the “non add” key to print problem numbers on the tape.

**Job Specific Goal:** Students will use the decimal point key and the subtotal key by touch.

**Job Specific Goal:** Students will use “Add Mode” and “Decimal Alignment” features.

This lesson will take 2 days.

Job 7--Multiplication

Pages 23 through 26

**Job Specific Goal:** Students will use the touch method to solve multiplication problems.

**Job Specific Goal:** Students will estimate answers for multiplication problems.

**Job Specific Goal:** Students will use the constant feature to solve multiplication problems.

Job 8--Division

Pages 27 through 30

**Job Specific Goal:** Students will use the touch method to solve division problems.

**Job Specific Goal:** Students will estimate answers for division problems.

**Job Specific Goal:** Students will determine averages.

**Job Specific Goal:** Students will use the constant feature to solve division problems.

**Job Specific Goal:** Students will solve chain division problems.

Job 9—Memory, Grand Total Key

Pages 31 through 34

**Job Specific Goal:** Students will use the memory register in solving business problems.

**Job Specific Goal:** Use the Grand Total Key in addition problems.

Job 10—Review, Analyzing Progress

Page 35 and 37

**Job Specific Goal:** Students will review addition, subtraction, multiplication, and division using the tough method.

**Job Specific Goal:** Students will review the “Non Add Key”, “Decimal Point Key”, “Add Mode”, “Alignment of Decimals”, “Subtotal Key”, and “Grand Total Key”.

Job 11—Decimals, Fractions, Percents

Pages 38 through 40

**Job Specific Goal:** Students will convert percents to decimals.

**Job Specific Goal:** Students will calculate a percent of increase or decrease.

**Job Specific Goal:** Students will calculate markup as a percent of selling price.

Job 12—Multiple Operations

Pages 41 through 44

**Job Specific Goal:** Students will use multiple operations to solve business problems.

Job 13—Multifactor and Negative Multiplication

**Job Specific Goal:** Students will use multifactor and negative multiplication to solve business problems.

Job 14—Production Drill/Bank Deposit Slips

Pages 49 through 53

**Job Specific Goal:** Students will prepare bank deposit slips.

Job 15—Review

Pages 55 and 56

**Job Specific Goal:** Students will review and improve their ability to convert fractions and percents to decimals.

**Job Specific Goal:** Students will solve problems involving multiple operations and multifactor and negative multiplication.

Job 16—Interest and Trade Discounts

Pages 57 through 60

**Job Specific Goal:** Students will solve interest ad trade discount problems.

Job 17—Cash and Chair Discounts

Pages 61 through 64

**Job Specific Goal:** Students will solve cash and chain discount problems

Job 18—Metrics and International Trade

Pages 65 through 68

**Job Specific Goal:** Students will understand the relationship of metric measurements to one another.

**Job Specific Goal:** Students will convert from U.S. equivalents to metric measurements.

Job 19—Production Drill: Bank Deposit Slip

Pages 69 through 74

**Job Specific Goal:** Students will process bank deposit slips

Job 20—Review

Pages 75 and 76

**Job Specific Goal:** Students will review and improve their ability to solve problems involving interest, trade discounts, cash and chain discounts, and metric measurements.

Job 21—Wage Earnings and income Taxes

Page 77 through 80

**Job Specific Goal:** Students will perform calculations necessary for figuring income and income taxes.

Job 22—Other Income an Taxes

Pages 81 through 84

**Job Specific Goal:** Students will perform calculations necessary for figuring other types of income and taxes.

Job 23—Money Management

Pages 85 and 86

**Job Specific Goal:** Students will perform calculations involving borrowing and saving money.

Job 24—Bank Statement Reconciliation

Pages 87 and 88

**Job Specific Goal:** Students will reconcile a bank statement balance and check register.

Job 25—Review

Pages 89 and 90

**Job Specific Goal:** Review and improve your ability to solve problems involving savings, account interest, stock dividends, and bank statements reconciliation.

Job 26—Expenditures and Budgets

Pages 92 through 94

**Job Specific Goal:** Students will perform calculations involving personal budgeting and finance.

Job 27—Stock Transactions

Pages 95 and 94

**Job Specific Goal:** Students will calculate profit loss on the sale of stock.

Job 28—Casualty Insurance

Pages 9 and 96

**Job Specific Goal:** Students will calculate casualty losses.

Job 29—School related Mathematical Problems

Pages 97 and 98

**Job Specific Goal:** Students will perform calculations involving school-related mathematical problems.

Job 30—Review

Pages 103 and 104

**Job Specific Goal:** Students will review and improve their ability to solve problems involving a school year budget, casualty insurance losses, housing expenditures, and stock transactions.

**1470.8 Exhibit an understanding of careers in accounting**

**RESOURCE: Website https://www.accounting.com/careers/**

**RESOURCE: Website https://www.accountingedu.org/career-resources/**

**RESOURCE: Website https://www.bls.gov/ooh/business-and-financial/accountants-and-auditors.htm**

**RESOURCE**: MBA Introduction to Finance PD: 152

**RESOURCE**: MBA Introduction to Finance PD 153

**1470.14 Distinguish between accounting and finance**

**1470.31 Explain the role of finance in business.**

**1470.36 Discuss employment opportunities inthe finance industry**

**1470.24 Discuss job opportunities for building professional relationship in finance.**

**RESOURCE**: MBA Introduction to Finance FI: 012

**RESOURCE:** MBA Introduction to Finance FI: 085

**RESOURCE**: MBA introduction to Finance FI: 354

**RESOURCE: Website https://corporatefinanceinstitute.com/resources/careers/jobs/finance-vs-accounting/**

**RESOURCE: Website https://www.accounting.com/resources/difference-between-accounting-and-finance/**

**1470.15 Acquire a foundational knowledge of accounting to understand its nature and scope**

**RESOURCE:** MBA Introduction to Finance FI: 085

**RESOURCE: Website** [**https://www.universalclass.com/articles/business/accounting/the-importance-of-understanding-accounting.htm**](https://www.universalclass.com/articles/business/accounting/the-importance-of-%09%09%09%09%09%09%09understanding-accounting.htm)

**RESOURCE: Website:** [**https://www.nerdwallet.com/article/small-business/basic-accounting-concepts**](https://www.nerdwallet.com/article/small-business/basic-accounting-concepts)

**CASH AND BANKING PROCEDURES**

**1470.1 Complete check stubs and checks**

**1470.2 Enter appropriate data on a deposit slip.**

**RESOURCE:** MBA Personal Finance FI: 069

**RESOURCE**: MBA Personal Finance FI: 560

**RESOURCE:** MBA Personal Finance FI: 565

**1470.3 Reconcile a bank statement.**

**RESOURCE:** MBA Personal Finance FI: 070

**1470.4 Demonstrate familiarity with online and electronic banking procedures.**

**RESOURCE: Website** [**https://youtu.be/V\_S0LhB5KlQ**](https://youtu.be/V_S0LhB5KlQ)

**RESOURCE: Website** [**https://youtu.be/pc5RNh1cX8A**](https://youtu.be/pc5RNh1cX8A)

**RESOURCE: Website** [**https://youtu.be/z8lq2Ptswsc**](https://youtu.be/z8lq2Ptswsc)

**RESOURCE:** MBA Personal Finance FI: 075

**1470.5 Exhibit understanding of credit cards and/or debit cards.**

**RESOURCE:** MBA Personal Finance FI: 002

**RESOURCE:** MBA Personal Finance FI: 782

**RESOURCE:** MBA Personal FinanceFI**:** 071

**RESOURCE:** MBA Personal Finance FI: 072

**1470.6 Manage muliple bank accounts and transactions.**

**RESOURCE:** MBA Introduction to Finance FI: 154

**RESOURCE: Website** [4 Tips For Managing Multiple Bank Accounts | Bankrate](https://www.bankrate.com/banking/savings/tips-for-managing-multiple-bank-accounts/)

**RESOURCE: Website** [How to Manage Multiple Bank Accounts (pocketsense.com)](https://pocketsense.com/manage-multiple-bank-accounts-5848518.html)

**RESOURCE: Website** [How to Manage Multiple Bank Accounts and Credit Cards Like an Expert (slickdeals.net)](https://money.slickdeals.net/banking/how-to-manage-multiple-bank-accounts-and-credit-cards/)

**1470.7 Exhibit understanding of terminology relating to accounting**

**RESOURCE: Website** [**https://acs.instructure.com/courses/22119/pages/learning-objectives-and-glossary-unit-6-dot-01-acquire-a-foundational-knowledge-of-accounting-to-understand-its-nature-and-scope**](https://acs.instructure.com/courses/22119/pages/learning-objectives-and-glossary-%09%09%09%09%09%09%09unit-6-dot-01-acquire-a-foundational-knowledge-of-accounting-to-understand-its-%09%09%09%09%09%09%09nature-and-scope)

**RESOURCE: Website** [**https://paysimple.com/blog/42-basic-accounting-terms-you-should-know/**](https://paysimple.com/blog/42-basic-accounting-terms-you-should-know/)

**1470.12 Determine classification of accounts and identify normal balances**

**RESOURCE: Website** [**https://www.indeed.com/career-advice/career-development/types-of-accounts-in-accounting**](https://www.indeed.com/career-advice/career-development/types-of-%09accounts-in-accounting)

**RESOURCE: Website** [**https://www.toppr.com/guides/accounting-and-auditing/theoretical-framework-of-accounting/classification-of-accounting/**](https://www.toppr.com/guides/accounting-and-auditing/theoretical-framework-of-accounting/classification-of-accounting/)

**1470.11 Identify various business entities**

**RESOURCE:**  MBA Introduction to Finance BL: 003

**RESOURCE:** MBA Introduction to Finance FI: 336

**RESOURCE: Econedlink (www.econedlink.org) PowerPoint--For lesson plan see file in Business & Marketing**

**1470.9 Exhibit understanding of regulatory bodies**

**RESOURCE:** MBA Introduction to Finance FL: 133

**RESOURCE**: MBA Introduction to Finance BL: 134

**RESOURCE**: MBA Introduction to Finance BL: 148

**RESOURCE**: MBA Introduction to Finance FL: 149

**RESOURCE**: MBA Introduction to Finance PD: 214

**EXCEL**

**MICROSOFT EXCEL HELP AND LEARNING WEBSITE**

[Excel help & learning (microsoft.com)](https://support.microsoft.com/en-us/excel)

**1470.13 Generate and interpret spreadsheets, charts, and graphs**

**1470.62 Generate and interpret spreadsheets, charts, and graphs**

**RESOURCE:** [How to Read an Excel Spreadsheet: 4 Steps (with Pictures) (wikihow.com)](https://www.wikihow.com/Read-an-Excel-Spreadsheet)

**RESOURCE**: [What Is Data Interpretation? Meaning, Methods & Examples (datapine.com)](https://www.datapine.com/blog/data-interpretation-methods-benefits-problems/)

**1470.63 Create and manage worksheets and workbooks**

**RESOURCE:** [Create a workbook in Excel (microsoft.com)](https://support.microsoft.com/en-us/office/create-a-workbook-in-excel-94b00f50-5896-479c-b0c5-ff74603b35a3)

**RESOURCE**: [Create a new workbook (microsoft.com)](https://support.microsoft.com/en-us/office/create-a-new-workbook-ae99f19b-cecb-4aa0-92c8-7126d6212a83)

**RESOURCE**: [Insert or delete rows and columns (microsoft.com)](https://support.microsoft.com/en-us/office/insert-or-delete-rows-and-columns-6f40e6e4-85af-45e0-b39d-65dd504a3246)

**RESOURCE**: [Share your Excel workbook with others (microsoft.com)](https://support.microsoft.com/en-us/office/share-your-excel-workbook-with-others-8d8a52bb-03c3-4933-ab6c-330aabf1e589)

**RESOURCE:** [What are linked data types in Excel? (microsoft.com)](https://support.microsoft.com/en-us/office/what-are-linked-data-types-in-excel-973d28d9-c51d-4dde-83be-898ecdf3efab)

**RESOURCE**: [Import data from the web (microsoft.com)](https://support.microsoft.com/en-us/office/import-data-from-the-web-b13eed81-33fe-410d-9247-1747269c28e4)

**1470.64 Manage data cells and ranges.**

**RESOURCE:** [Move or copy cells and cell contents (microsoft.com)](https://support.microsoft.com/en-us/office/move-or-copy-cells-and-cell-contents-803d65eb-6a3e-4534-8c6f-ff12d1c4139e)

**RESOURCE**: [Available number formats in Excel (microsoft.com)](https://support.microsoft.com/en-us/office/available-number-formats-in-excel-0afe8f52-97db-41f1-b972-4b46e9f1e8d2)

**1470.65 Create tables, charts, and objects.**

**RESOURCE:** [Create and format tables (microsoft.com)](https://support.microsoft.com/en-us/office/create-and-format-tables-e81aa349-b006-4f8a-9806-5af9df0ac664)

**RESOURCE**: [Create a chart from start to finish (microsoft.com)](https://support.microsoft.com/en-us/office/create-a-chart-from-start-to-finish-0baf399e-dd61-4e18-8a73-b3fd5d5680c2)

**1470.66 Perform operations with formulas and layouts.**

**RESOURCE:** [Overview of formulas in Excel (microsoft.com)](https://support.microsoft.com/en-us/office/overview-of-formulas-in-excel-ecfdc708-9162-49e8-b993-c311f47ca173)

RESOURCE: [Automatically number rows (microsoft.com)](https://support.microsoft.com/en-us/office/automatically-number-rows-76ce49e3-d8d2-459b-bd85-ee1d3973e6e6)

**1470.67 Apply custom data formats and layouts**

**RESOURCE:** [Ways to format a worksheet (microsoft.com)](https://support.microsoft.com/en-us/office/ways-to-format-a-worksheet-d5efbdb5-b79b-475a-8c56-99aad944b030)

**1470.68 Create formulas**

**RESOURCE:** [Create a simple formula in Excel (microsoft.com)](https://support.microsoft.com/en-us/office/create-a-simple-formula-in-excel-11a5f0e5-38a3-4115-85bc-f4a465f64a8a)

**RESOURCE**: [Create formulas (microsoft.com)](https://support.microsoft.com/en-us/office/create-formulas-b0c54a42-0057-41dc-9d33-098deccb2278)

**PERSONAL FINANCE**

**1470.38 Understand the fundamental principles of money needed to make financial exchanges.**

**1470.42 Explain forms of Financial exchange (cash, credit, debit, electronic funds transfer, etc).**

**1470.17 Explain forms of financial exhange (e.g. cash, credit, debit, eletrocnic funds transfer, etc)**

**RESOURCE:** Personal Finance Chapter 2

**RESOURCE**: Personal Finance Chapter 13

**RESOURCE**: MBA Personal Finance FI: 060

**RESOURCE**: MBA Personal Finance FI: 063

**RESOURCE**: MBA Introduction to Finance PD: 154

**1470.39 Describe the sources of income (e.g., wages/salaries, interest, rent, dividends, transfer payments, gift funds, inheritances).**

**1470.40 Read a pay stub and describe the different deductins.**

**1470.41 Differentiate between gross, net, and taxable income**

**RESOURCE**: Personal Finance Chapter 7

**RESOURCE**: MBA Personal Finance FI: 061

**RESOURCE**: MBA Personal Finance FI: 068

**RESOURCE**: MBA Personal Finance FI: 067

**1470.43 Analyze financial needs and goals to determine financial requirements**

**1470.44 Manage personal finances to achieve financial goals.**

**RESOURCE**: Personal Finance Chapter 1

**RESOURCE**: Personal Finance Chapter 4

**RESOURCE**: Personal Finance Chapter 5

**RESOURCE**: Personal Finance Chapter 21

**RESOURCE**: Business & Marketing Chapter 1

**1470.45 Understand the use of financial-service providers to aid in financial-goal achievement**

**1470.35 Describe types of financial-service providers**

**RESOURCE**: MBA Introduction to Finance FI: 075

**RESOURCE:** MBA Introduction to Finance FI: 075

**RESOURCE:** MBA Introduction to Finance FI: 336

**RESOURCE:** Personal Finance Chapter 11

**RESOURCE**: Personal Finance Chapter 8

**RESOURCE**: MBA Personal Finance FI: 065

**RESOURCE**: MBA Personal Finance FI: 075

**RESOURCE**: MBA Personal Finance FI: 076

**1470.49 Explain the purposes and importance of credit.**

**1470.53 Discuss types of loans**

**RESOURCE**: MBA Personal Finance FI: 625

**1470.50 Explain how credit card grace periods, methods of interest, calculation and fees affect borrowing costs.**

**1470.51 Compane what happens if a borrower fails to make required payments on a secured load, such as an auto loan or a home**

**mortgage, versus failing to pay a credit card account.**

**1470.52 Explain how a borrower's credit score can impact their cost of credit and their ability to get credit.**

**RESOURCE**: Personal Finance Chapter 9

**RESOURCE**: Introduction to Business Chapter 18

**RESOURCE**: MBA Personal Finance FI:072

**1470.58 Develop a personal budget**

**RESOURCE**: Personal Finance Chapter 6

**RESOURCE**: Personal Finance Chapter 14

**RESOURCE**: Personal Finance Chapter 15

**RESOURCE**: Personal Finance Chapter 16

**RESOURCE**: Personal Finance Chapter 17

**RESOURCE**: Personal Finance Chapter 18

**RESOURCE**: Personal Finance Chapter 19

**RESOURCE**: Personal Finance Chapter 20

**RESOURCE**: MBA Personal Finance FI: 066

**1470.48 Explain the need to save and invest.**

**1470.47 Explain types of investments**

**RESOURCE**: MBA Introduction to Finance FI: 077

**RESOURCE**: Personal Finance Chapter 3

**RESOURCE**: Personal Finance Chapter 11

**RESOURCE**: MBA Personal Finance FI: 270

**RESOURCE**: MBA Personal Finance FI: 077

**RESOURCE**: MBA Personal Finance FI: 304

**RESOURCE**: MBA Personal Finance FI: 274

**RESOURCE**: MBA Personal Finance FI: 275

**1470.54 Discuss the nature of retirement planning**

RESOURCE: MBA Personal Finance FI: 569

**1470.55 Describe sources of securities informtion.**

**1470.18 Explain the types of financial markets (e.g. money market, capital market, insurane market, comm**

**1470.33 Explain types of financial markets (e.g., moneymarket, capital market, insurance market, commodieies.**

**1470.34 Describe the foreign exhange market.**

**RESOURCE**: MBA Introduction to Finance FI: 336

**RESOURCE**: MBA Introduction to Finance FI: 337

**RESOURCE**: Introduction to Business Chapter 19

**RESOURCE**: MBA Personal Finance FI: 313

**RESOURCE**: MBA Personal Finance FI: 309

**RESOURCE**: MBA Introduction to Finance PD: 157

**1470.56 Explain the nature of estate planning**

**RESOURCE**: MBA Personal Finance FI: 572

**1470.57 Determine the personal net worth.**

**RESOURCE**: MBA Personal Finance FI: 562

**1470.46 Discuss non-traditional uses for financial information (e.g.lean, sustainability reporting, activity-based costing, etc.).**

**RESOURCE**: MBA Introduction to Finance FI: 579

**RESOURCE**: MBA Personal Finance FI: 568

**1470.59 Explain where income taxes are collected from and how they provide revenue for public expenses**

**RESOURCE**: MBA Introduction to Finance EC: 072

**1470.60 Complete IRS Form W-4.**

**RESOURCE**: Website <https://www.irs.gov/forms-pubs/about-form-w-4>

**1470.61 Complete a 1040 form to file their tax returns.**

**RESOURCE**: Personal Finance Chapter 7

**RESOURCE**: MBA Personal Finance FI: 074

**FINANCIAL INFORMATION**

**1470.28 History of Money**

**RESOURCE: Website:** [**https://www.investopedia.com/articles/07/roots\_of\_money.asp**](https://www.investopedia.com/articles/07/roots_of_money.asp)

**1470.29 Foreign Money**

**RESOURCE: Webiste:** [**https://www.wellsfargo.com/foreign-exchange/currency-rates/**](https://www.wellsfargo.com/foreign-exchange/currency-rates/)

**RESOURCE: Website:** [**https://www.bankofamerica.com/foreign-exchange/foreign-currency-exchange/**](https://www.bankofamerica.com/foreign-exchange/foreign-currency-exchange/)

**1470.16 Calculate the time value of Money**

RESOURCE: MBA Personal Finance FI :062

**1470.19 Describe the nature of convergence / consolidation in the fnance industry.**

**RESOURCE**: MBA Introduction to Finance FI: 573

**RESOURCE**: MBA Introduction to Finance EC: 105

**RESOURCE**: MBA Introduction to Finance EC: 008

**1470.20 Explain the nature and scope of financial globalization.**

**RESOURCE**: MBA Introduction to Finance EC: 104

**RESOURCE**: MBA Introduction to Finance FI: 574

**RESOURCE**: MBA Introduction to Finance FI: 575

**1470.21 Describe the techniques used to analyze customer financial information**

**1470.30 Describe the need for financial information**

**RESOURCE**: MBA Introduction to Finance FM: 002

**RESOURCE**: MBA Introduction to Finance FI: 574

**1470.22 Describe budgeting applications.**

**RESOURCE: Website:** [**https://mint.intuit.com/**](https://mint.intuit.com/)

**RESOURCE: Website:** [**https://www.youneedabudget.com/**](https://www.youneedabudget.com/)

**1470.23 Demonstrate financial analysis applications.**

**RESOURCE**: MBA Introduction to Finance EC: 013

**1470.25 Identify the factors that impact governance structures.**

**RESOURCE**: MBA Introduction to Finance EC: 008

**RESOURCE**: MBA Introduction to Finance PD: 302

**1470.32 Discuss the role of government,and semi-government financial institutions (e.g., Small business Administration, Federal Housing** **Administratin, etc**.)

**1470.26 Discuss the nature of risk control (Internal and external).**

**1470.27 Discuss the nature of enterprise risk management**

**1470.37 Discuss the nature of risk management.**

**RESOURCE**: MBA Introduction to Finance PD: 213

**RESOURCE**: MBA Introduction to Finance SM: 075

**\*\*\*\*\*OTHER TOPICS SUGGESTED BY MBA**

**IF TIME PERMITS AT THE END OF THE YEAR**

**CUSTOMER RELATIONS**

CR: 004 Demonstrate a customer-service mindset

CR: 005 Reinforce servie orientation through communication

CR: 006 Respond to customer inquiries

CR: 019 Adapt communication to the cultural and social diffeences among clients.

CR: 007 Interpret business policies to customers/clients

CR: 012 Explain the responsibilities of finance professionals in provuiding client services

CR: 009 handle difficult customers

CR: 010 Handle customer/client complaints

CR: 001 Identify company's brand promise

CR: 002 Determine ways of reinforcing the company's image through employee performance

**HUMAN RESOURCE MANAGEMENT**

HR: 360 Orient new employees

**OPERATIONS**

OP: 004 Describe health and safety regulations inbusiness

OP: 005 Report noncompliance with business health and safety regulations

OP: 007 Follow safety precautions

OP: 008 Maintain a safe work environment

OP: 009 Explain procedures for handling accidents

OP: 010 Handle and report emergency situations

OP: 013 Explain routine security precautions

OP: 152 follow established security procedures/policies

OP: 153 Protech company information and intangibles

OP: 441 Explain information privacy, security, and confidentiality considerations in business

OP: 064 Maintain data security

OP: 015 Explain the nature and scope of purchasing

OP: 016 Place orders/reorders

OP: 031 Maintain inventory of supplies

OP: 017 Explain the concept of production

OP: 442 Comply with policies and procedures for use jof property and equipment

OP: 443 Explain the concept of supply chain