

## **Learning Plans**

Meetings  
Presentations  
Business Documents  
Mail  
Telephone and Fax  
Electronic Mail  
Business Etiquette

## **Checklists**

Plan a Meeting  
Conduct a Meeting  
Take Meeting Minutes  
Oral Presentation  
Proofread/Edit  
Compose Written Messages  
Sort/Prioritize Mail  
Mail/Shipping Methods  
Telephone Communications  
Fax Documents  
Electronic Mail



## **Why This Skill Is Important**

Meetings are vital for the efficient operation of any business. The purpose of this unit is to assist your knowledge in planning, conducting, and taking minutes for a meeting. There are three competencies addressed in this learning plan.

## **Related Wisconsin Model Academic Standards for Business**

A.12.2, A.12.5-12, A.12.18, A.12.20, and A.BS.9

### **Competency 1**

Plan a meeting

#### *Linked Core Abilities*

- A. Demonstrate basic academic skills
- B. Use effective personal and interpersonal skills
- C. Apply critical thinking and information processing skills

#### *Performance Standards*

**Criteria**—When your performance will be acceptable:

- you prepare an agenda
- you notify meeting participants in advance
- you send agenda to participants prior to meeting
- meeting is scheduled in an appropriate location
- you make arrangements for meeting (tables, refreshments, etc.)
- you prepare documents, handouts, data necessary for the meeting

**Conditions**—How you will be evaluated:

- in the workplace and/or school setting
- given information and instruction from meeting chairperson

### **Competency 2**

Conduct a meeting

#### *Linked Core Abilities*

- A. Demonstrate basic academic skills
- B. Use effective personal and interpersonal skills
- C. Apply critical thinking and information processing skills
- D. Relate to the complex interrelationships of systems

*Performance Standards*

**Criteria**—When your performance will be acceptable:

- you utilize parliamentary procedure
- you follow the agenda
- you solicit discussion from all members
- you keep meeting discussions on schedule, as identified in the agenda
- you speak clearly and distinctly
- you summarize discussion and verify group decisions
- you use correct grammar while leading the meeting

**Conditions**—How you will be evaluated:

- in the workplace or for a school or community organization
- after preparing an agenda for a scheduled meeting

**Competency 3**

Take minutes for a meeting

*Linked Core Abilities*

- A. Demonstrate basic academic skills
- C. Apply critical thinking and information processing skills
- D. Relate to the complex interrelationships of systems
- E. Work with a variety of technologies

*Performance Standards*

**Criteria**—When your performance will be acceptable:

- minutes are typed in an acceptable format
- minutes are typed error free
- minutes contain accurate information
- minutes include motions and actions taken
- minutes are prepared within established time frame

**Conditions**—How you will be evaluated:

- in the workplace or for a school or community organization
- for a scheduled meeting

## Learning Activities

- \_\_\_\_\_ 1. Identify the various types of meetings taking place in business today.
- \_\_\_\_\_ 2. Discuss the purpose of a meeting and the process of planning a meeting.
- \_\_\_\_\_ 3. Interview someone in business regarding the function of meetings in the organization and summarize findings in class.
- \_\_\_\_\_ 4. Prepare a checklist for items to be included in a meeting.
- \_\_\_\_\_ 5. Plan an agenda for a meeting.
- \_\_\_\_\_ 6. Notify meeting participants in advance; send agenda and letter informing participants of meeting.
- \_\_\_\_\_ 7. Schedule meeting in appropriate location.
- \_\_\_\_\_ 8. Coordinate arrangements for meeting.
- \_\_\_\_\_ 9. Prepare handouts and other data necessary for meeting.
- \_\_\_\_\_ 10. Demonstrate parliamentary procedures in classroom setting.
- \_\_\_\_\_ 11. Conduct a meeting following an agenda.
- \_\_\_\_\_ 12. Solicit discussion from all meeting members.
- \_\_\_\_\_ 13. Demonstrate good grammar and communications skills during meeting.
- \_\_\_\_\_ 14. Demonstrate leadership skills while facilitating the meeting.
- \_\_\_\_\_ 15. Review techniques for taking minutes of a meeting.
- \_\_\_\_\_ 16. Attend a meeting in the school such as co-curricular, committee, department, administrative, or staff; take minutes.
- \_\_\_\_\_ 17. Attend a meeting outside the school such as school board, city, county, state, or a business; take minutes.



## **Why This Skill Is Important**

Oral presentation skills provide students with the knowledge of first impressions, body language, and recognition of personal space in any given situation. There are two competencies addressed in this learning plan.

## **Related Wisconsin Model Academic Standards for Business**

A.12.6, A.12.9, A.12.11-12, A.12.17, A.BS.5-8, and A.BS.12

## **Competency 1**

Give an oral presentation

### *Linked Core Abilities*

- A. Demonstrate basic academic skills
- B. Use effective personal and interpersonal skills
- C. Apply critical thinking and information processing skills

### *Performance Standards*

**Criteria**—When your performance will be acceptable:

- you adapt volume, rate, inflection, and tone to the needs of the audience
- you use correct grammar throughout the presentation
- you use vocabulary appropriate to the audience
- you speak in a clear, concise manner avoiding distracting interrupters
- you express content of message in an organized pattern that achieves personal goal
- you demonstrate body language, eye contact, and recognition of personal space appropriate to audience and environment

**Conditions**—How you will be evaluated:

- in the workplace or in a school-related activity or for a community event
- prepared for a specific purpose and audience

## Competency 2

Create specialized documents including components such as tables, graphs, and multi-column documents

### *Linked Core Abilities*

- A. Demonstrate basic academic skills
- C. Apply critical thinking and information processing skills
- D. Relate to the complex interrelationships of systems
- E. Work with a variety of technologies

### *Performance Standards*

**Criteria**—When your performance will be acceptable:

- you apply mailability standards to the documents
- tables in documents are centered within text
- tables include aligned columns
- tables and graphs include headings
- graphs (bar, line, pie, etc.) are selected for data following guidelines of the organization
- graphs include labeling, key, and/or legend
- charts, tables, and graphs include footnotes when necessary

**Conditions**—How you will be evaluated:

- in the workplace or simulated situation
- provided information to compile

## Learning Activities

- \_\_\_\_\_ 1. Evaluate appropriate and inappropriate body language for an oral presentation.
- \_\_\_\_\_ 2. Demonstrate the different types of presentation styles.
- \_\_\_\_\_ 3. Observe instructor or expert demonstrate a skill.
- \_\_\_\_\_ 4. Videotape own presentation; complete self-assessment.
- \_\_\_\_\_ 5. Prepare appropriate visual aids for presentation.
- \_\_\_\_\_ 6. Present informational or persuasive message with visual aids.
- \_\_\_\_\_ 7. Present demonstration including props and audience participation.

## **Why This Skill Is Important**

Today's workplace thrives on information. In addition, information is communicated through reading and writing. Many workers find themselves in a job that requires at least some writing. As the economy depends more and more on information and its expanding technology, jobs will require better skilled readers and writers. Learning to create written forms of business communications will better prepare you for a multitude of positions and careers. This learning plan addresses two competencies.

## **Related Wisconsin Model Academic Standards for Business**

A.12.1, A.12.2, A.12.4, A.12.11, A.12.12, A.12.14, A.12.15, A.12.16, A.12.17, A.12.18, A.BS.3

## **Competency 1**

Proofread and edit written documents

### *Linked Core Abilities*

- A. Demonstrate basic academic skills
- C. Apply critical thinking and information processing skills

### *Performance Standards*

**Criteria**—When your performance will be acceptable:

- you use proofreader's marks
- you correct errors in grammar and spelling
- you correct errors in content and word usage
- you correct errors in formatting
- you produce a document suitable for use and/or publication

**Conditions**—How you will be evaluated:

- in the workplace or school setting
- provided unedited documents

## **Competency 2**

Compose written messages

### *Linked Core Abilities*

- A. Demonstrate basic academic skills
- C. Apply critical thinking and information processing skills

### *Performance Standards*

**Criteria**—When your performance will be acceptable:

- you compile the information needed
- you use the writing process: prewrite, draft, edit, publish
- you organize information in formats appropriate for the intended purposes
- you use correct grammar, punctuation, and spelling
- you use appropriate tone, degree of formality, and reading level for the intended audience
- message is concise
- message is complete
- message is courteous
- you produce a document suitable for use/publication

**Conditions**—How you will be evaluated:

- in the workplace or school setting
- with a need to transmit internal/external message(s)

### **Learning Activities**

- \_\_\_\_\_ 1. **Brainstorm** purposes for communicating in business; then **categorize** into writing, speaking, listening, presenting, etc.
- \_\_\_\_\_ 2. **Brainstorm** examples of writing in business (such as forms, requests, memos, newsletters, manuals, product descriptions, policy statements, meeting notes).
- \_\_\_\_\_ 3. **Discuss** purposes of writing business documents, such as: inform, give information, explain, instruct, persuade, communicate goodwill, extend appreciation, etc.
- \_\_\_\_\_ 4. **Identify** characteristics and types of readers (audience)-people who have different wants or needs, interests, and levels of understanding.
- \_\_\_\_\_ 5. **Analyze** and **revise** a letter “from the reader’s perspective.”
- \_\_\_\_\_ 6. **Analyze** several examples of format: brochures, ads, reports, memos, letters, handbooks, manuals, policy statements, pamphlets, proposals, instructions, logs, recommendations, newsletters, etc.
- \_\_\_\_\_ 7. **Analyze** your own knowledge of workplace writing.
- \_\_\_\_\_ 8. **List** ways in which you can continually improve your writing.
- \_\_\_\_\_ 9. **Identify** parts of business documents (business letter, memo, report).

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- \_\_\_\_\_ 10. **Analyze** and **revise** a business document for correct format.
  - \_\_\_\_\_ 11. **Identify** strategies for delivering bad news and good news.
  - \_\_\_\_\_ 12. **Identify** and **give examples** of the “Five C’s” of writing: correct, courteous, complete, concrete, and concise.
  - \_\_\_\_\_ 13. **Complete** an exercise where you rewrite sentences for the “Five C’s.”
  - \_\_\_\_\_ 14. **Bring in** a “real” letter or memo from your (or your parent’s) workplace-with permission! **Analyze** the letter for content and format. **Produce** a revised copy.
  - \_\_\_\_\_ 15. In a small group, **write** different types of letters such as a request for information, complaint, good news, bad news. Have letters critiqued by at least one adult. **Compile** and **reproduce** packet for class.
  - \_\_\_\_\_ 16. **Write** and **type** a letter, which you actually send, and requires a response.



## Why This Skill Is Important

Even though we are in the electronic age, businesses still prepare and receive a large volume of mail. This learning plan will introduce you to procedures for handling incoming and outgoing mail—both paper and electronic. This learning plan addresses two competencies.

## Related Wisconsin Model Academic Standards for Business

B.12.19

### Competency 1

Sort and prioritize mail

#### *Linked Core Abilities*

- C. Apply critical thinking and information processing skills
- D. Relate to the complex interrelationships of systems

#### *Performance Standards*

**Criteria**—When your performance will be acceptable:

- you open and date incoming mail, except personal and confidential mail, according to company policy/procedures
- you return incoming mail that has been incorrectly received by the company
- you include special instructions for action or response as needed
- you distribute incoming mail accurately and promptly to the designated locations, according to company policy/procedures

**Conditions**—How you will be evaluated:

- in the workplace or in a simulated situation
- after receipt of the department's or company's mail

### Competency 2

Select method for sending domestic and international mail

#### *Linked Core Abilities*

- C. Apply critical thinking and information processing skills
- D. Relate to the complex interrelationships of systems
- E. Work with a variety of technologies

### *Performance Standards*

**Criteria**—When your performance will be acceptable:

- you identify the most cost- and time-effective method of handling outgoing document/package
- you prepare address/shipping label and packaging for outgoing document/package in accordance with organizational procedures and postal regulations
- you sort outgoing document/package by size/weight and post accordingly
- you maintain records of special mailings
- you contact courier to advise of package destination, weight and dimensions, deadline, and schedule pick-up when appropriate
- you prepare custom papers if destination is international
- you ensure a signed receipt by addressee within established deadline

**Conditions**—How you will be evaluated:

- in the workplace or simulated situation
- given items to be mailed

### **Learning Activities**

- \_\_\_\_\_ 1. Identify steps in opening and distributing mail based on size and type of business.
- \_\_\_\_\_ 2. Operate a postage meter.
- \_\_\_\_\_ 3. Calculate postage costs using the U.S. Postal Service web page.
- \_\_\_\_\_ 4. Develop a list of postal supplies such as various sizes and types of envelopes, packaging materials, etc.
- \_\_\_\_\_ 5. Compare shipping rates and service between post office and independent shipping businesses.
- \_\_\_\_\_ 6. Determine the most cost efficient method for sending correspondence and packages.
- \_\_\_\_\_ 7. Calculate postage for international mail using Internet.
- \_\_\_\_\_ 8. Sort mail based on importance to reader.
- \_\_\_\_\_ 9. Discuss bulk rate requirements.
- \_\_\_\_\_ 10. Discuss letterhead design and matching envelopes in relationship to scanning procedures at the post office; design letterhead.
- \_\_\_\_\_ 11. Tour a post office.
- \_\_\_\_\_ 12. Prepare a form for expected mail.

- \_\_\_\_ 13. Define certified mail, registered mail, overnight service, money orders, etc.
- \_\_\_\_ 14. Perform a mail merge using labels.
- \_\_\_\_ 15. Sort labels in mail merge for state, city, etc.
- \_\_\_\_ 16. Determine weight of item to be sent.
- \_\_\_\_ 17. Identify classes of mail to be used.



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## Telephone and Fax Learning Plan

### Why This Skill Is Important

Do you constantly spend time on the phone? Are you using your time on the phone effectively? You need to sell yourself and your business over the telephone. This learning plan addresses two competencies.

### Related Wisconsin Model Academic Standards for Business

B.12.18, B.12.20, A.12.7, A.12.10, A.12.16, A.12.20, B.12.12, J.12.11, and B.BS.14

### Competency 1

Use telephone features/equipment for business communications

#### *Linked Core Abilities*

- A. Demonstrate basic academic skills
- B. Use effective personal and interpersonal skills
- C. Apply critical thinking and information processing skills
- D. Relate to the complex interrelationships of systems
- E. Work with a variety of technologies

#### *Performance Standards*

**Criteria**—When your performance will be acceptable:

- you follow company policy when answering and screening incoming calls
- you use correct telephone techniques in placing or returning telephone calls
- your conversations are conducted and concluded in a professional and courteous manner
- you give appropriate information or requested assistance to the caller or the call is referred to the appropriate individual
- you record messages completely and accurately
- you document calls according to company guidelines

**Conditions**—How you will be evaluated:

- given several business scenarios in a simulated situation or in the workplace using actual business events

## Competency 2

Fax documents

### *Linked Core Abilities*

E. Work with a variety of technologies

### *Performance Standards*

**Criteria**—When your performance will be acceptable:

- an exact copy and transmission is completed according to specifications
- document received is complete and legible
- transmission includes clear routing instructions to appropriate individual(s)
- confirmation of document sent is logged in journal or filed

**Conditions**—How you will be evaluated:

- in the workplace or in a simulated situation
- provided documents to transmit

## Learning Activities

- \_\_\_\_\_ 1. Design a message pad for recording small orders.
- \_\_\_\_\_ 2. Record messages from taped conversations that cover a variety of business situations.
- \_\_\_\_\_ 3. Prepare a checklist of factors to consider when purchasing or replacing a phone system.
- \_\_\_\_\_ 4. Prepare a spreadsheet showing telephone costs of a business.
- \_\_\_\_\_ 5. Discuss factors that contribute to the cost of a telephone call.
- \_\_\_\_\_ 6. Prepare a checklist of factors to consider when planning a telephone call.
- \_\_\_\_\_ 7. Record voice on tape answering a business phone.
- \_\_\_\_\_ 8. Design an internal company phone list.
- \_\_\_\_\_ 9. Complete telephone directory worksheet.
- \_\_\_\_\_ 10. Roleplay situations emphasizing ethics of company telephone for personal calls.
- \_\_\_\_\_ 11. Discuss telephone experiences from students' work experiences.
- \_\_\_\_\_ 12. Roleplay situations handling a complaint.
- \_\_\_\_\_ 13. Discuss receptionist duties as related to telephone techniques.
- \_\_\_\_\_ 14. Discuss nonverbal messages that are conveyed by receptionist.

- \_\_\_\_\_ 15. Identify speaking techniques that lead to a positive tone on the phone.
- \_\_\_\_\_ 16. Answer the telephone at work or at the school office.
- \_\_\_\_\_ 17. Roleplay situations involving putting callers on hold and transferring calls.
- \_\_\_\_\_ 18. Tour local telephone company.
- \_\_\_\_\_ 19. Prepare and record a voice mail message for customers.
- \_\_\_\_\_ 20. Use internal voice mail to leave a message for instructors.
- \_\_\_\_\_ 21. Identify factors to consider when purchasing a fax machine for a business.
- \_\_\_\_\_ 22. Complete a fax cover sheet.
- \_\_\_\_\_ 23. Send a fax.



## **Why This Skill Is Important**

Electronic mail is an important component of communication in business today all over the world. You will identify how to compose a message, transmit, save, and purge e-mail documents following the netiquette guidelines.

## **Related Wisconsin Model Academic Standards for Business**

A.12.4, B.12.15-18, B.12.19, and B.12.21

## **Competency**

Use electronic mail

### *Linked Core Abilities*

- A. Demonstrate basic academic skills
- E. Work with a variety of technologies

### *Performance Standards*

**Criteria**—When your performance will be acceptable:

- message is transmitted via electronic mail system to intended recipient in accordance with established procedures
- message is prepared and transmitted in accordance to generally accepted netiquette guidelines
- you regularly monitor mailbox for receipt of e-mail
- you save and purge e-mail records according to established guidelines

**Conditions**—How you will be evaluated:

- in the workplace or the classroom
- with need to transmit or receive information

## **Learning Activities**

- \_\_\_ 1. **Identify** the types of e-mail available.
- \_\_\_ 2. **Establish** an account monitored by the school.
- \_\_\_ 3. **Discuss** and **review** the writing process of e-mail for business.
- \_\_\_ 4. **Compose** and **send** a simple message to the instructor regarding a business headline and response.
- \_\_\_ 5. **Review** and **discuss** the netiquette guidelines.
- \_\_\_ 6. **Monitor** mailbox for receipt of e-mail.

- \_\_\_\_ 7. **Save and purge** e-mail record(s) according to guidelines given in class.
- \_\_\_\_ 8. **Compose and send** e-mail message to workplace mentor or supervisor.
- \_\_\_\_ 9. **Delete unnecessary message(s)** in mailbox on a routine basis.

## Why This Skill Is Important

In the competitive world of business, the little niceties and social amenities may mean the difference between simply existing and gaining the edge. Business etiquette may be described as knowing what to do in a variety of situations. When you have completed these activities, you should feel more comfortable and react appropriately in a variety of business situations. This learning plan addresses three competencies.

## Related Wisconsin Model Academic Standards for Business

A.12.1, A.12.4, A.12.9, A.BS.7, B.12.1-2, B.12.4, B.12.19-20, B.BS.7-9, H.BS.6, J.12.1, J.12.4, J.12.9, J.BS.1-3, J.BS.5-6, K.12.8, and K.12.1

## Competency 1

Give an oral presentation

### *Linked Core Abilities*

- A. Demonstrate basic academic skills
- B. Use effective personal and interpersonal skills
- C. Apply critical thinking and information processing skills

### *Performance Standards*

**Criteria**—When your performance will be acceptable:

- you adapt volume, rate, inflection, and tone to the needs of the audience
- you use correct grammar throughout the presentation
- you use vocabulary appropriate to the audience
- you speak in a clear, concise manner avoiding distracting interrupters
- you express content of message in an organized pattern that achieves personal goal
- you demonstrate body language, eye contact, and recognition of personal space appropriate to audience and environment

**Conditions**—How you will be evaluated:

- in the workplace or in a school-related activity or for a community event
- prepared for a specific purpose and audience

## Competency 2

Use telephone features/equipment for business communications

### *Linked Core Abilities*

- A. Demonstrate basic academic skills
- B. Use effective personal and interpersonal skills
- C. Apply critical thinking and information processing skills
- D. Relate to the complex interrelationships of systems
- E. Work with a variety of technologies

### *Performance Standards*

**Criteria**—When your performance will be acceptable:

- you follow company policy when answering and screening incoming calls
- you use correct telephone techniques in placing or returning telephone calls
- your conversations are conducted and concluded in a professional and courteous manner
- you give appropriate information or requested assistance to the caller or the call is referred to the appropriate individual
- you record messages completely and accurately
- you document calls according to company guidelines

**Conditions**—How you will be evaluated:

- given several business scenarios in a simulated situation or in the workplace using actual business events

## Competency 3

Use electronic mail

### *Linked Core Abilities*

- A. Demonstrate basic academic skills
- E. Work with a variety of technologies

### *Performance Standards*

**Criteria**—When your performance will be acceptable:

- message is transmitted via electronic mail system to intended recipient in accordance with established procedures
- message is prepared and transmitted in accordance to generally accepted netiquette guidelines

- you regularly monitor mailbox for receipt of e-mail
- you save and purge e-mail records according to established guidelines

**Conditions**—How you will be evaluated:

- in the workplace or the classroom
- with need to transmit or receive information

## Learning Activities

- \_\_\_\_\_ 1. Compile a list of Internet business etiquette sites.
- \_\_\_\_\_ 2. Roleplay practicing introductions in a variety of business situations.
- \_\_\_\_\_ 3. Conduct phone conversations to practice courteous ways to answer the phone, transfer calls, put callers on hold, and end the conversation.
- \_\_\_\_\_ 4. Discuss e-mail etiquette.
- \_\_\_\_\_ 5. Create e-mail messages to improve composition skills.
- \_\_\_\_\_ 6. Discuss voice mail etiquette.
- \_\_\_\_\_ 7. Compose and record a voice mail message.
- \_\_\_\_\_ 8. Key letter addresses and salutations using appropriate wording based on the situation and the level of acquaintance.
- \_\_\_\_\_ 9. Roleplay to display the proper table etiquette and manners to use at a business luncheon.
- \_\_\_\_\_ 10. Discuss conduct and etiquette in a social situation (drinking, smoking, gift giving, mingling, etc.).
- \_\_\_\_\_ 11. Discuss etiquette based on different ethnic backgrounds (such as Happy Holidays versus Merry Christmas).
- \_\_\_\_\_ 12. Practice tipping in various travel situations (bellhop, taxi driver, server, etc.).
- \_\_\_\_\_ 13. Create a presentation describing business etiquette in a foreign country that the student selects.
- \_\_\_\_\_ 14. View a video that shows business etiquette in action.



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## Plan a Meeting Checklist

### Competency

Plan a meeting

### Linked Core Abilities

Use effective personal and interpersonal skills

Apply critical thinking and information processing skills

Demonstrate basic academic skills

### Directions

After you have an opportunity to practice planning meetings you will be asked to demonstrate your newly acquired skill in the workplace or in a school setting. Your competence will be assessed by your supervisor or your instructor. Carefully review the checklist as you prepare yourself for this important task.

### Scoring Standard

For satisfactory performance of this competency *all* criteria must be met and checked "yes," unless the criterion was not demonstrated during this performance.

### Scoring Guide

Criteria	Rating	Comments
1 you prepare an agenda	yes no not observed	
2 agenda is well organized (Core Ability)	yes no not observed	
3 agenda meets expectations of supervisor or organization (Core Ability)	yes no not observed	
4 you notify meeting participants in advance	yes no not observed	
5 you send agenda to participants prior to meeting	yes no not observed	
6 meeting is scheduled in an appropriate location	yes no not observed	
7 you make arrangements for meeting (tables, refreshments, etc.)	yes no not observed	
8 you prepare documents, handouts, data necessary for the meeting	yes no not observed	



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## Conduct a Meeting Checklist

### Competency

Conduct a meeting

### Linked Core Abilities

Demonstrate basic academic skills

Use effective personal and interpersonal skills

Apply critical thinking and information processing skills

Relate to the complex interrelationships of systems

### Directions

After you have an opportunity to practice conducting meetings you will be asked to demonstrate your newly acquired skill in the workplace or in a school or community organization. Your competence will be assessed by your supervisor or instructor. Carefully review the checklist as you prepare yourself for this important task.

### Scoring Standard

For satisfactory performance of this competency *all* criteria must be met and checked "yes," unless the criterion was not demonstrated during this performance.

### Scoring Guide

Criteria	Rating	Comments
1 you use parliamentary procedure	yes no not observed	
2 you follow the agenda	yes no not observed	
3 you solicit discussion from all members	yes no not observed	
4 you keep meeting discussions on schedule as identified in the agenda	yes no not observed	
5 you recognize problems and problem situations (Core Ability)	yes no not observed	
6 you receive verbal messages and other cues from the participants through effective listening	yes no not observed	
7 you attend to messages and other cues by interpreting and/or responding appropriately	yes no not observed	
8 you speak clearly and distinctly	yes no not observed	
9 you use correct grammar while leading the meeting	yes no not observed	
10 you use leadership skills (Core Ability)	yes no not observed	



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## Take Meeting Minutes Checklist

### Competency

Take minutes for a meeting

### Linked Core Abilities

Demonstrate basic academic skills

Apply critical thinking and information processing skills

Relate to the complex interrelationships of systems

Work with a variety of technologies

### Directions

After you have an opportunity to practice taking minutes for a meeting, you will be asked to demonstrate your newly acquired skill in the workplace or for a school or community organization. Your competence will be assessed by your supervisor or your instructor. Carefully review the checklist as you prepare yourself for this important task.

### Scoring Standard

For satisfactory performance of this competency *all* criteria must be met and checked "yes," unless the criterion was not demonstrated during this performance.

### Scoring Guide

Criteria	Rating	Comments
1 you use a computer to produce meeting minutes (Core Ability)	yes no not observed	
2 minutes are typed in an acceptable format	yes no not observed	
3 minutes contain accurate information	yes no not observed	
4 minutes are typed error-free	yes no not observed	
5 minutes include motions and actions taken	yes no not observed	
6 you organize meeting information (Core Ability)	yes no not observed	
7 minutes demonstrate your ability to listen and attend to oral messages (Core Ability)	yes no not observed	



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# Oral Presentation Checklist

## Competency

Give an oral presentation

## Linked Core Abilities

Demonstrate basic academic skills

Use effective personal and interpersonal skills

Apply critical thinking and information processing skills

## Directions

After you have an opportunity to practice making oral presentations, you will be asked to demonstrate your newly acquired skill in the workplace or for a school or community organization. Your competence will be assessed by your supervisor or your instructor. Carefully review the checklist as you prepare yourself for this important task.

## Scoring Standard

For satisfactory performance of this competency *all* criteria must be met and checked “yes,” unless the criterion was not demonstrated during this performance.

## Scoring Guide

Criteria	Rating	Comments
1 you adapt volume, rate, inflection, and tone to the needs of the audience	yes no not observed	
2 you use correct grammar throughout the presentation	yes no not observed	
3 you use vocabulary appropriate to the audience	yes no not observed	
4 you speak in a clear, concise manner avoiding distracting interrupters	yes no not observed	
5 you express content of message in an organized pattern that achieves personal goal	yes no not observed	
6 you demonstrate body language, eye contact, and recognition of personal space appropriate to audience and environment	yes no not observed	
7 you attend to messages and other cues by interpreting and/or responding appropriately (Core Ability)	yes no not observed	



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## *Proofread / Edit* Checklist

### Competency

Proofread and edit written documents

### Linked Core Abilities

Demonstrate basic academic skills

Apply critical thinking and information processing skills

### Directions

After you have an opportunity to practice making proofreading and editing a document, you will be asked to demonstrate your newly acquired skill in the workplace and/or your school setting. Your competence will be assessed by your supervisor and/or your instructor. Carefully review the checklist as you prepare yourself for this important task.

### Scoring Standard

For satisfactory performance of this competency *all* criteria must be met and checked “yes,” unless the criterion was not demonstrated during this performance.

### Scoring Guide

Criteria	Rating	Comments
1 you use proofreader’s marks	yes no not observed	
2 you correct errors in grammar and spelling	yes no not observed	
3 you correct errors in content and word usage	yes no not observed	
4 you correct errors in formatting	yes no not observed	
5 you produce a document suitable for use and/or publication	yes no not observed	



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# Compose Written Messages Checklist

## Competency

Compose written messages

## Linked Core Abilities

Demonstrate basic academic skills

Apply critical thinking and information processing skills

## Directions

After you have an opportunity to practice composing written messages for a variety of purposes, you will be asked to demonstrate your newly acquired skill in the workplace and/or your school setting. Your competence will be assessed by your supervisor and/or your instructor. Carefully review the checklist as you prepare yourself for this important task.

## Scoring Standard

For satisfactory performance of this competency *all* criteria must be met and checked “yes,” unless the criterion was not demonstrated during this performance.

## Scoring Guide

Criteria	Rating	Comments
1 you compile the information needed	yes no not observed	
2 you use the writing process: prewrite, draft, edit, publish	yes no not observed	
3 you organize information in formats appropriate for the intended purposes	yes no not observed	
4 you use correct grammar, punctuation, and spelling	yes no not observed	
5 you use appropriate tone, degree of formality, and reading level for the intended audience	yes no not observed	
6 message is concise	yes no not observed	
7 message is complete	yes no not observed	
8 message is courteous	yes no not observed	
9 you communicate thoughts, ideas, information, and messages effectively	yes no not observed	
10 you produce a document suitable for use/publication	yes no not observed	



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## Sort/Prioritize Mail Checklist

### Competency

Sort and prioritize mail

### Linked Core Abilities

Apply critical thinking and information processing skills  
Relate to the complex interrelationships of systems

### Directions

When you become familiar with your workplace and the people who work there, you will probably have an opportunity to participate in the sorting and prioritizing of the mail deliveries for the organization or in a simulated situation created by your instructor. Your competence in performing this task will be assessed by your supervisor. Carefully review the checklist as you prepare yourself for this important function.

### Scoring Standard

For satisfactory performance of this competency *all* criteria must be met and checked "yes," unless the criterion was not demonstrated during this performance.

### Scoring Guide

Criteria	Rating	Comments
1 you open and date incoming mail, except personal and confidential mail, according to company policy/procedures	yes no not observed	
2 you return incoming mail that has been incorrectly received by the company	yes no not observed	
3 you include special instructions for action or response as needed	yes no not observed	
4 you distribute incoming mail accurately and promptly to the designated locations, according to company policy/procedures	yes no not observed	
5 you organize and maintain information (Core Ability)	yes no not observed	
6 you recognize problems and problem situations (Core Ability)	yes no not observed	



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## *Mail/Shipping Methods* Checklist

### Competency

Select method for sending domestic and international mail

### Linked Core Abilities

Apply critical thinking and information processing skills

Relate to the complex interrelationships of systems

Work with a variety of technologies

### Directions

After you have an opportunity to review the various methods used to carry mail and for shipping articles, you will be asked to demonstrate your newly acquired skill in the workplace and/or in a simulated situation. Your competence will be assessed by your supervisor and/or your instructor. Carefully review the checklist as you prepare yourself for this important task.

### Scoring Standard

For satisfactory performance of this competency *all* criteria must be met and checked "yes," unless the criterion was not demonstrated during this performance.

### Scoring Guide

Criteria	Rating	Comments
1 you identify the most cost- and time-effective method of handling outgoing document/package	yes no not observed	
2 you select the most appropriate resources for the task (Core Ability)	yes no not observed	
3 you prepare address/shipping label and packaging for outgoing document/package in accordance with organizational procedures and postal regulations	yes no not observed	
4 you sort outgoing document/package by size/ weight and post accordingly	yes no not observed	
5 you maintain records of special mailings	yes no not observed	
6 you contact courier to advise of package destination, weight and dimensions, deadline, and schedule pick-up when appropriate	yes no not observed	
7 you prepare custom papers if destination is international	yes no not observed	
8 you ensure a signed receipt by addressee within established deadline	yes no not observed	



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# Telephone Communications Checklist

## Competency

Use telephone features/equipment for business communications

## Linked Core Abilities

Demonstrate basic academic skills

Use effective personal and interpersonal skills

Apply critical thinking and information processing skills

Relate to the complex interrelationships of systems

Work with a variety of technologies

## Directions

After you have an opportunity to practice using various telephone features/equipment for business communications, you will be asked to demonstrate your newly acquired skill in the workplace and/or in a simulated situation. Your competence will be assessed by your supervisor and/or your instructor. Carefully review the checklist as you prepare yourself for this important task.

## Scoring Standard

For satisfactory performance of this competency *all* criteria must be met and checked "yes," unless the criterion was not demonstrated during this performance.

## Scoring Guide

Criteria	Rating	Comments
1 you follow company policy when answering and screening incoming calls	yes no not observed	
2 you use correct telephone techniques in placing or returning telephone calls	yes no not observed	
3 your conversations are conducted and concluded in a professional and courteous manner	yes no not observed	
4 you attend to messages and other cues by interpreting and/or responding appropriately (Core Ability)	yes no not observed	
5 you give appropriate information or requested assistance to the caller or the call is referred to the appropriate individual	yes no not observed	
6 you record messages completely and accurately	yes no not observed	
7 you document calls according to company guidelines	yes no not observed	



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## *Fax Documents* Checklist

### Competency

Fax documents

### Linked Core Abilities

Work with a variety of technologies

### Directions

After you have an opportunity to practice transmitting documents via fax, you will be asked to demonstrate your newly acquired skill in the workplace and/or in a simulated situation. Your competence will be assessed by your supervisor and/or your instructor. Carefully review the checklist as you prepare yourself for this important task.

### Scoring Standard

For satisfactory performance of this competency *all* criteria must be met and checked “yes,” unless the criterion was not demonstrated during this performance.

### Scoring Guide

Criteria	Rating	Comments
1 an exact copy and transmission is completed according to specifications	yes no not observed	
2 document received is complete and legible	yes no not observed	
3 transmission includes clear routing instructions to appropriate individual(s)	yes no not observed	
4 confirmation of document sent is logged in journal or filed	yes no not observed	
5 you use the proper procedures when working with the fax equipment (Core Ability)	yes no not observed	
6 you solve minor equipment-related problems, as necessary (Core Ability)	yes no not observed	



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## *Electronic Mail* Checklist

### Competency

Use electronic mail

### Linked Core Abilities

Demonstrate basic academic skills  
Work with a variety of technologies

### Directions

After you have an opportunity to practice transmitting information via electronic mail system, you will be asked to demonstrate your newly acquired skill in the workplace and/or in a simulated situation. Your competence will be assessed by your supervisor and/or your instructor. Carefully review the checklist as you prepare yourself for this important task.

### Scoring Standard

For satisfactory performance of this competency *all* criteria must be met and checked "yes," unless the criterion was not demonstrated during this performance.

### Scoring Guide

Criteria	Rating	Comments
1 message is transmitted via electronic mail system to intended recipient in accordance with established procedures	yes no not observed	
2 message is prepared and transmitted in accordance to generally accepted netiquette guidelines	yes no not observed	
3 you communicate thoughts, ideas, information, and messages in writing (Core Ability)	yes no not observed	
4 you regularly monitor mailbox for receipt of e-mail	yes no not observed	
5 you save and purge e-mail records according to established guidelines	yes no not observed	

