**TEXAS CTE LESSON PLAN**

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| **Lesson Identification and TEKS Addressed** | |
| **Cluster** | Human Services |
| **Course** | Practicum in Human Services |
| **Lesson/Unit Title** | Business Procedures, Equipment, and Technology |
| **TEKS Student Expectations** | **130.280. (c) Knowledge and Skills**  (9) The student selects and uses appropriate business procedures and equipment to produce satisfying client outcomes and business success. The student is expected to:  (A) Manage funds using appropriate technologyS  (B) Place orders for customers and supplies using sound business practices  (C) Respond to client questions appropriately  (D) Advise customers using appropriate and relevant information |
| **Basic Direct Teach Lesson** | |
| **Instructional Objectives** | **Students will:**   * Determine effective communication techniques * Summarize appropriate service techniques to advise clients * Identify business transactions used in the industry * Identify methods of placing orders for customers and supplies |
| **Rationale** | Properly and efficiently managing funds in a business produces satisfying client outcomes and business success. With the use of advanced technology, it is easier to place orders for customers and supplies. Establishing best practices for customer service are essential for a favorable outcome of a business. In preparation for careers in the field of Human Services, this lesson will provide an excellent opportunity to better understand the importance of effective client service, technology and managing funds. |
| **Duration of Lesson** | Three 45-minute class periods |
| **Word Wall** | **Business transactions:** An economic event that initiates the accounting process of recording it in a company’s accounting system  **Client/Customer/Patron:** A person who pays a professional person or organization for services  **Courtesy:** Polite behavior that shows respect for other people  **Finances:** The way in which money is used and handled; especially: the way in which large amounts of money are used and handled by governments and companies  **Funds:** Amounts of money that are used for a special purpose  **Point-of-sale (POS) system:** A computerized system that can be used to take orders, generate bills, track revenue, create reports, manage inventory, facilitate communication between staff member and other functions  **Technology:** The application of scientific knowledge for practical purposes, especially in industry  **Transaction:** A business deal such as an occurrence in which goods, services or money are passed from one person, account to another |
| **Materials/**  **Specialized Equipment Needed** | **Equipment:**   * Computer with projector for PowerPoint presentation * Computers with Internet access (be sure to follow district guidelines)   **Materials:**   * Cardstock * Container   **Supplies:**   * Adding machine * Beauty supplies found at a salon * Business invoice * Calculator * Cash register (if available) * Employee handbook * Example of the use of social media by businesses * Petty cash reimbursement form * Play money * Receipt for goods and services * Shopping bags * Store receipts * Systems software (if available)   + Point-of-sale (PMS) * Various store advertisements   **Other appropriate lessons:**  Client Retention: Services, Techniques, and Resources Practicum in Human Services  How to Effectively Communicate with Clients Practicum in Human Services  Mathematical Applications in Human Services Practicum in Human Services  Optional: Become familiar with the Small Business Administration’s Learning Center that provides a 30-minute online course in accounting. This course will provide students with a certificate they will be able to add to their portfolio.  Introduction to Accounting This course is designed to provide an overview of accounting.<https://www.sba.gov/tools/sba-learning-center/training/introduction-accounting>   * Copies of handouts   **PowerPoint:**   * Business Procedures, Equipment, and Technology   **Technology:**   * Free iPad App:   + Calculator for iPad Free<https://itunes.apple.com/us/app/calculator-for-ipad-free/id398129933?mt=8> * Infographic:   + What is Good Customer Service?<http://www.infographicsshowcase.com/customer-service-statistics-infographic/> * TEDx Talk:   + Dan Cobley: What physics taught me about marketing Physics and marketing don’t seem to have much in common, but Dan Cobley is passionate about both. He brings these unlikely bedfellows together using Newton’s second law, Heisenberg’s uncertainty principle, the scientific method and the second law of thermodynamics to explain the fundamental theories of branding.<https://www.ted.com/talks/dan_cobley_what_physics_taught_me_about_marketing>   **YouTube:**   * Five Steps to Improve Customer Satisfaction Steps to improve customer satisfaction.<https://youtu.be/XK3cNcuvuMs> * How can we create an extraordinary customer experience today – Gillian James, TMI How can we create an extraordinary customer experience today? How can we engage our customer in our business? With more than 20 years of experience in the field, Gillian James, Managing Director TMI UK, shares eight trends seen around the world to empower the customer experience. <https://youtu.be/C35gF7HDeJQ> * Using the POS (Point of Sale) System A brief tutorial of the basic functions of the POS system used in the food service department at Umpqua Community College. Topics include: clocking in/out, inputting a customer’s order, closing a ticket & printing a checkout (sales summary) report.<https://youtu.be/rISyrnykrEw>   **Graphic organizers:**   * Note-taking – Business Procedures, Equipment, and Technology   **Handouts:**   * Anticipation Guide – Business Procedures, Equipment, and Technology * Career and Business Transactions Application Project * Extraordinary Customer Service Experience * Human Services Industry Career Cards * (Key) Anticipation Guide – Business Procedures, Equipment, and Technology * (Key) Extraordinary Customer Service Experience * Rubric for Oral Presentation |
| **Anticipatory Set** | **Prior to class:**  Display as many of the lesson-related supplies (see Materials or Specialized Equipment Needed) as you have available on a table in front of the room. Supplies can include:   * Adding machine * Beauty supplies found at a salon * Business invoice * Calculator * Cash register (if available) * Employee handbook * Example of the use of social media by businesses * Petty cash reimbursement form * Play money * Receipt for goods and services * Shopping bags * Store receipts * Systems software (if available)   + Point-of-sale (PMS) * Various store advertisements   **Script:**  Look at the items on the table. How do the items relate to producing satisfying client outcomes and business success?  Distribute the Anticipation Guide – Business Procedures, Equipment, and Technology handout prior to viewing the PowerPoint. Prior to the start of this lesson, the students will read each statement and place a check mark by each statement they THINK is true.  After the lesson, this handout will be revisited in the Lesson Closure section to check for knowledge of the lesson. |
| **Direct Instruction with Special Education Modifications/**  **Accommodations** | Note to teacher: Prior to beginning this lesson, review, preview and select the appropriate multimedia for your classes.  Introduce objectives, terms, and definitions.  Distribute the handout Note-taking Business Procedures, Equipment, and Technology. Teacher will determine the notes to be recorded by students. Inform students that they will be expected to take notes and participate in discussions while viewing the slide presentation.  Introduce and discuss the PowerPoint Business Procedures, Equipment, and Technology. Allow time for questions, answers, and classroom discussion.  Use appropriate notes from Presentation Notes for Business Procedures, Equipment, and Technology for discussion.  Using the Note-taking Business Procedures, Equipment and Technology handout, students will have an opportunity to reflect upon, review and respond to the information pertaining to the PowerPoint. They will write a summary of topics or statements which reflect the information from the lesson:   * Discuss the topic * Write down your thoughts * Make a real-world connection to the lesson * How will this information help you in a career in Human Services?   Allow for questions and answers to check for understanding.  Video included in slide presentation:   * Five Steps to Improve Customer Satisfaction Steps to improve customer satisfaction.<https://youtu.be/XK3cNcuvuMs> * Using the POS (Point of Sale) System A brief tutorial of the basic functions of the POS system used in the food service department at Umpqua Community College. Topics include: clocking in/out, inputting a customer’s order, closing a ticket & printing a checkout (sales summary) report.<https://youtu.be/rISyrnykrEw>   *Individualized Education Plan (IEP) for all special education students must be followed. Examples of accommodations may include, but are not limited to:*   * checking for understanding * encouraging participation |
| **Guided Practice with Special Education Modifications/**  **Accommodations** | Distribute the Extraordinary Customer Service Experience handout. Individually, as they watch the YouTube video, students will complete only the left column of the handout.   * How can we create an extraordinary customer experience today – Gillian James, TMI How can we create an extraordinary customer experience today? How can we engage our customer in our business? With more than 20 years of experience in the field, Gillian James, Managing Director TMI UK, shares eight trends seen around the world to empower the customer experience. <https://youtu.be/C35gF7HDeJQ>   Upon completion of the video, with a partner, students will continue filling in the chart with the appropriate information. Inform them to be prepared to share their responses with the class.  Allow time for review of handout and class discussion.  Completion of the handout can be assessed as a daily grade.  *Individualized Education Plan (IEP) for all special education students must be followed. Examples of accommodations may include, but are not limited to:*   * repeating instructions * providing assistance |
| **Independent Practice/Laboratory Experience with Special Education Modifications/**  **Accommodations** | **Prior to activity:**  Note to teacher: Print the teacher resource, Human Services Industry Career Cards on card stock and cut apart so that one student from each group draws a card for the project. Place cards in a container.  Divide class into groups of three.  Using the teacher resource, Human Services Industry Career Cards, have one student from each group draw a card. The selected card will determine the career the students will focus on during the project. Blank cards are available for other careers.  Read the following scenario:  You and your classmates have just returned from a college job fair event where numerous Human Services-related occupational careers were represented. Upon returning to the classroom, your teacher divides the class into groups and has each group determine:   * How business transactions are initiated * Methods of placing orders for customers and supplies   Distribute the handout Career and Business Transactions Application Project. As a group, students will create and present a five- to seven-minute oral presentation to the class. The presentation must include:   * Provide information about how business transactions are initiated and methods of placing orders for customers and supplies within the career you selected * Use of at least one prop * The conclusion will include a demonstration of at least one appropriate way to communicate with clients to produce satisfying customer service and business success * Written summary of their project   On the handout, students will write down the career listed on the card they selected and the Human Services Careers Pathway it pertains to. Example: Cosmetologists – Personal Care Services Pathway.  Distribute and review Rubric for Oral Presentation prior to the start of the assignment so that students are aware of assessment procedures.  Keep students focused and on task. Provide assistance if needed.  *Individual Education Plan (IEP) for all special education students must be followed. Examples of accommodations may include, but not limited to:*   * checking for understanding * providing a peer to read materials * providing oral responses |
| **Lesson Closure** | Review objectives, terms, and definitions.  Students will present their projects. Allow time for questions and discussion.  Re-distribute the graphic organizer Anticipation Guide – Business Procedures, Equipment and Technology used in the Anticipatory Set and allow students to revisit each statement. At the conclusion of the lesson, students will reread each statement and place a check mark by each statement they KNOW is true. They will provide information that PROVES other statements are not true. (Key) Anticipation Guide – Business Planning Procedures, Equipment and Technology has been provided for your use. As class, compare the two sets of answers.  Allow for questions and class discussion. Check for understanding. |
| **Summative/End of Lesson Assessment with Special Education Modifications/**  **Accommodations** | Student projects will be presented to the class and assessed with Rubric for Oral Presentation.  *Individualized Education Plan (IEP) for all special education students must be followed. Examples of accommodations may include, but are not limited to:*   * grading according to work done * shortened, simplified instructions |
| **References/**  **Resources** | **Images:**   * Photos obtained through a license with Shutterstock.com®.   **Websites:**   * Small Business Administration (SBA)  Customer Service online course.<https://www.sba.gov/tools/sba-learning-center/training/customer-service>   **YouTube:**   * Five Steps to Improve Customer Satisfaction Steps to improve customer satisfaction.<https://youtu.be/XK3cNcuvuMs> * How can we create an extraordinary customer experience today – Gillian James, TMI How can we create an extraordinary customer experience today? How can we engage our customer in our business? With more than 20 years of experience in the field, Gillian James, Managing Director TMI UK, shares eight trends seen around the world to empower the customer experience. <https://youtu.be/C35gF7HDeJQ> * Using the POS (Point of Sale) System A brief tutorial of the basic functions of the POS system used in the food service department at Umpqua Community College. Topics include: clocking in/out, inputting a customer’s order, closing a ticket & printing a checkout (sales summary) report.<https://youtu.be/rISyrnykrEw> |
| **Additional Required Components** | |
| **English Language Proficiency Standards (ELPS) Strategies** | * Word wall * Draw visual representation of terms on word wall * Add terms and definitions to personal dictionary * Check for understanding * Have students repeat instructions |
| **College and Career Readiness Connection[[1]](#footnote-1)** |  |
| **Recommended Strategies** | |
| **Reading Strategies** | Current Events: Assign students to read about the importance of client satisfaction and managing a business. Information can be found in newspaper articles, magazines, journals, and online print.  Suggestions:   * How to Ensure Strong Customer Service and Customer Satisfaction<http://managementhelp.org/customers/service.htm> * Measuring and Managing Customer Satisfaction [http://www.qualitydigest.com/magazine/2000/sep/article/measuring-and-managing-customer-satisfaction.html#](http://www.qualitydigest.com/magazine/2000/sep/article/measuring-and-managing-customer-satisfaction.html) * What Does Your Customer Expect?<http://www.qualitydigest.com/magazine/2008/jul/column/what-does-your-customer-expect.html> * The Importance of Basic Math in Business  Whether you are aware of it or not, math is used in most aspects of your daily life, both at home and in the office. Knowledge of basic math can save you a lot of time when you’re at the clothing store or supermarket, but it is also important in a business environment.<http://www.ehow.com/facts_7472221_importance-basic-math-business.html> * Have students form their own questions about the text prior to reading or have them write down any questions that come to mind as they are reading. * Encourage students to connect reading to their life experiences or prior knowledge |
| **Quotes** | It takes 20 years to build a reputation and five minutes to ruin it. If you think about that, you’ll do things differently. **-Warren Buffett**  Your customers are responsible for your company’s reason for existing. **-Marilyn Suttle**  When you’re busy, avoid taking the quickest action. Instead make the extra effort to truly serve the customer. **-Marilyn Suttle** |
| **Writing Strategies** | **Journal Entries:**   * The point-of-sale system at my work does \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_. * With the aid of technology and computer software programs, business transactions can be \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_. * One method of placing orders for customers and supplies can include \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.   **Writing Strategy:**  RAFT (Role/ Audience/Format/Topic) writing strategy:   * Role: Owner of a business * Audience: New employee * Format: Memo * Topic: The importance of properly managing customer and business finances |
| **Communication 90 Second Speech Topics** | * Business finance involves \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_. * A property management system (PMS) can keep track of information for all the departments by \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_. |
| **Other Essential Lesson Components** | |
| **Enrichment activity** | * Visit the human resources department in a human services company and go through a short training program conducted for employees regarding business tools used on the job. * Read the article on e-commerce trends and write down predictions for the next year. What facts can you base the predictions on? Have students write a one-page paper on how e-commerce is used in Human Services they are focused on. * Interview a manager in a government, medical, retail, or personal service business to find out how the Internet, e-commerce, video or teleconferencing and the computers are used in the business to assist customers or patients. What are the benefits, pitfalls of the Internet? Does this speed up service or care? Write a report and share it with class.   **TED Talks:**  TEDx is a program of local, self-organized events that bring people together to share a TED-like experience. At a TEDx event, TEDTalks videos and live speakers combine to spark deep discussion and connection in a small group. These local, self-organized events are branded TEDx, where x = independently organized TED event.  The video below is related to this lesson. Allow students to view the video, and lead a discussion concerning the TED Talk.   * Dan Cobley: What physics taught me about marketing Physics and marketing don’t seem to have much in common, but Dan Cobley is passionate about both. He brings these unlikely bedfellows together using Newton’s second law, Heisenberg’s uncertainty principle, the scientific method and the second law of thermodynamics to explain the fundamental theories of branding.<https://www.ted.com/talks/dan_cobley_what_physics_taught_me_about_marketing> |
| **Family/**  **Community Connection** | * Practice keeping track of money spent in Human Services. If possible, balance your family’s checkbook. * If ordering personal purchases online, identify the methods of recording your order, retrieving previous personal information, and any other significant information. |
| **CTSO connection** | **Family, Career and Community Leaders of America (FCCLA)**  <http://texasfccla.org>  **STAR Events:**   * Chapter Service Project (Display and Manual): A team event – recognizes chapters that develop and implement an in-depth service project that makes a worthwhile contribution to families, schools, and communities. Students must use Family and Consumer Sciences content and skills to address and act on a community need. * Entrepreneurship: An individual or team event – recognizes participants who develop a plan for a small business using Family and Consumer Sciences skills and sound business practices. The business must relate to an area of Family and Consumer Sciences education or related occupations. * Leadership: An individual event, recognizes participants who actively evaluate and grow in their leadership potential. Participants use the Student Leadership Challenge and supporting materials, to investigate their leadership ability and develop a mentorship relationship to further their leadership development. |
| **Service Learning Projects** | Successful service learning project ideas originate from student concerns and needs. Allow students to brainstorm about service projects pertaining to the lesson. For additional information on service learning see:<http://www.nylc.org>  Conduct a recycling program of electronic products. Electronic products are made from valuable resources and materials, including metals, plastics, and glass, all of which require energy to mine and manufacture. All monies collected by the recycling efforts can be applied to purchasing new electronic equipment for the classroom. |

1. Visit the Texas College and Career Readiness Standards at <http://www.thecb.state.tx.us/collegereadiness/CRS.pdf>, Texas Higher Education Coordinating Board (THECB), 2009. [↑](#footnote-ref-1)