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| **TEXAS CTE LESSON PLAN**  [www.txcte.org](http://www.txcte.org) | |
| **Lesson Identification and TEKS Addressed** | |
| **Career Cluster** | Business Management and Administration |
| **Course Name** | Business Information Management I |
| **Lesson/Unit Title** | Business Document Formatting |
| **TEKS Student Expectations** | **130.136. (c) Knowledge and Skills**  (6) The student applies word-processing technology.  (A) The student is expected to identify customary styles of business documents  (B) The student is expected to improve touch-system skills using the keyboard and keypad to input data  (C) The student is expected to use hardware and software needed to produce documents to address different computer applications  (D) The student is expected to demonstrate writing techniques generating ideas and gathering information relevant to the topic and purpose while maintaining accurate records of outside sources |
| **Basic Direct Teach Lesson**  (Includes Special Education Modifications/Accommodations and  one English Language Proficiency Standards (ELPS) Strategy) | |
| **Instructional Objectives** | **Performance Objective**  Students will understand different types of business documents as well as effective enhancements to these documents.  **Specific Objectives**   * Identify the purposes for a variety of business documents * Display proper formatting for different business documents * Enhance business documents with word processing tools |
| **Rationale** | The main purposes of this lesson are to help students understand the following concepts:   * the purposes for a variety of business documents * how to make documents look professional * how to utilize the keypad in documents when creating tables |
| **Duration of Lesson** | When taught as written, this lesson should take approximately four to five days to complete. |
| **Word Wall/Key Vocabulary**  *(ELPS c1a,c,f; c2b; c3a,b,d; c4c; c5b) PDAS II(5)* | * Business letter‐ a letter written from a business to another business * Personal business letter‐ a letter written from an individual to a business * Block style‐ a letter with all parts left‐aligned * Modified block style‐ a letter with the date and closing parts tabbed to the right 3” * Table‐ organized presentation of data into columns and rows * Organizational chart‐ a diagram showing the structure of personnel in an organization * Venn diagram‐ a diagram that shows how topics are related and usually consists of overlapping shapes * Flowchart‐ a diagram that shows the steps involved in a process * Bookmark‐ in an electronic document, bookmarks are links to other parts within the document |
| **Materials/Specialized Equipment Needed** | * Instructor Computer/Projection Unit * Websites |
| **Anticipatory Set**  (May include pre-assessment for prior knowledge) | **Ask** students if they know the difference in purpose between a letter and an e-mail.  **Ask** students if they are aware of word processing documents aside from letters and reports. |
| **Direct Instruction \*** | 1. Types of Business Documents 2. Letters (to existing and prospective customers) 3. Proposals that accompany external sales and internal purchases 4. Annual Reports that include financial data 5. Forms such as applications and invoices 6. Newsletters 7. Letters, Memorandums, E‐Mails 8. All are common communication tools 9. Letters are more formal/ can be internal or external 10. business style‐ from a business to another business 11. personal business‐ from an individual to a business 12. Electronic Documents 13. Memorandum‐ usually internal (within an organization) 14. E‐Mail‐ less formal/ can be internal or external/ basically an electronic memorandum 15. Proposals 16. Usually a formal request 17. Contains an intent or purpose (such as request for new programs, equipment, or business from a potential client) 18. Contains a description of a solution to a problem or needs to be addressed 19. Contains the costs involved 20. Forms 21. Can include invoices and receipts 22. Usually, format is dependent upon type of company 23. For some companies, forms may be: 24. Applicants 25. Contacts 26. Bank statements 27. Tax records 28. Newsletters 29. Usually two to three columns 30. Provides information and updates about an organization 31. Contains creative elements to make it more interesting to read 32. Can contain enhancements to make it more interesting to read 33. Reports 34. Informative document/longer than a letter 35. Contains data and statistics 36. Can contain financial information (like annual reports) 37. Can contain sales information 38. Can contain marketing information 39. Enhancements to Business Documents 40. Tables 41. Charts and Graphs 42. Diagrams 43. Borders and Shading 44. Title Page 45. Table of Contents 46. Bookmarkers 47. Text Formatting   Teacher Note: Ask students if they would rather look at a document that is text  only or a document that also contained charts or other graphics.  *Individualized Education Plan (IEP) for all special education students must be followed. Examples of accommodations may include, but are not limited to:*  NONE |
| **Guided Practice \*** | Provide students with a couple of different scenarios they may encounter in their lives. First, ask students to raise their hand if they have a cell phone. There will probably be many hands because, today, this technological device almost seems like a necessity for teenagers. Has their screen ever broken? Have any buttons ever stopped working? What would they do if they had to keep repairing their phone, it kept breaking, and they would like to formally complain to the company?  Next, have students imagine that they just had an interview for the most amazing job they could imagine. They really want this job, but there could be hundreds of other candidates who have applied. What can they do to set themselves apart from the competition?  The answer to both scenarios is to write an effective and professional letter. Have students work together in pairs to type a letter for each situation. After giving them some time, place an example of a properly formatted, professionally designed letter for each situation on the projector so students can see the “answer key.” You may use the samples found later in this lesson.  *Individualized Education Plan (IEP) for all special education students must be followed. Examples of accommodations may include, but are not limited to:*  NONE |
| **Independent Practice/Laboratory Experience/Differentiated Activities \*** | Copy enough pages of the letter parts (found later in this lesson) for each student. Cut out each part and laminate (if desired). Pass out the letter parts to each student and give them a time limit so they can place the parts in the proper order. For example, include six spaces before the date, three spaces after the date, and the complimentary close and salutation in the proper place.  *Individualized Education Plan (IEP) for all special education students must be followed. Examples of accommodations may include, but are not limited to:*  NONE |
| **Lesson Closure** | Question #1: What are four common types of business documents?  Answer #1: Letters, Proposals, Annual Reports, and Forms  Question #2: Which type of document is mainly used to present information?  Answer #2: A report provides information; the most common is an “Annual Report” for a company.  Question #3: An invoice is what type of document?  Answer #3: An invoice is a form. It provides prices, quantities, description, and shipping information.  Question #4: List three enhancements to business documents.  Answer #4: Tables, diagrams, and text formatting are some of the enhancements a writer can add to business documents.  Question #5: What is a flowchart?  Answer #5: A flowchart is a diagram that visually shows the steps in a particular process. |
| **Summative / End of Lesson Assessment \*** | *See attachments.*  *Individualized Education Plan (IEP) for all special education students must be followed. Examples of accommodations may include, but are not limited to:*  **Accommodations for Learning Differences:**  It is important that lessons accommodate the needs of every learner. These lessons may be modified to accommodate your students with learning differences by referring to the files found on the Special Populations page of this website. |
| **References/Resources/**  **Teacher Preparation** | **References**   * <http://nces.ed.gov/programs/digest/d10/tables/dt10_246.asp>   **Preparation**   * Review and familiarize yourself with the terminology, website links, and proper document formatting techniques. * Have materials, websites, and lesson outline ready prior to the start of the lesson. |
| **Additional Required Components** | |
| **English Language Proficiency Standards (ELPS) Strategies** |  |
| **College and Career Readiness Connection[[1]](#footnote-1)** | **English‐English I**   * 110.31(b)(1)   Reading/Vocabulary Development. Students understand new vocabulary and use it when reading and writing.   * 110.3(b)(11)   Reading/Comprehension of informational text/procedural texts. Students understand how to glean and use information in procedural texts and documents.  **Math‐Algebra I**   * 111.32(b)(1)(C)   Interpret and make decisions, predictions, and critical judgments from functional relationships. |
| **Recommended Strategies** | |
| **Reading Strategies** |  |
| **Quotes** |  |
| **Multimedia/Visual Strategy**  **Presentation Slides + One Additional Technology Connection** |  |
| **Graphic Organizers/Handout** |  |
| **Writing Strategies**  **Journal Entries + 1 Additional Writing Strategy** |  |
| **Communication**  **90 Second Speech Topics** |  |
| **Other Essential Lesson Components** | |
| **Enrichment Activity**  (e.g., homework assignment) | Ask students to interview a businessperson. It can be a family member. Ask them questions regarding the type of documents they use most on the job. Try to get them to specify a percentage for several types of documents including letters, memos, tables, diagrams, proposals, reports, and any other documents. Display your findings in a document style of your choice. |
| **Family/Community Connection** |  |
| **CTSO connection(s)** | Business Professionals of America  Future Business Leaders of America |
| **Service Learning Projects** |  |
| **Lesson Notes** |  |

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)