Business and Enterprise Support

National Occupational Standards

November 2013

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CFABES001
Develop awareness amongst potential clients as a source of trusted and responsible support

Overview
This standard is about developing awareness of you and/or your organisation as a trusted and responsible source of advice and guidance amongst individuals considering starting their own business and existing businesses. It requires you to develop a value proposition for your service, identify ways of engaging with potential customer groupings, respond effectively to enquiries from potential clients and manage the initial interaction, in order to develop the relationship.

For the purposes of this standard, business support refers to assistance which is received from individuals or organisations outside of the business, related to a specific business problem or opportunity and/or development of the business. Enterprise support refers to assistance which is received by individuals considering starting their own business. A 'business' can mean an independent entity such as a private sector business, a social enterprise, a charitable or voluntary organisation, or a significant operating unit, with a relative degree of autonomy, within a larger organisation. It can also refer to a formal partnership where two or more businesses are working together towards common goals.

This standard is recommended for individuals and organisations providing assistance to support the development of individuals considering starting their own business and existing businesses, either on a voluntary or commercial basis.

CFABES001
Develop awareness amongst potential clients as a source of
trusted and responsible support

Performance criteria

You must be able to:

P1 identify your motivations and drivers to offering business and enterprise support and working with individuals considering starting their own business and existing businesses

P2 develop a value proposition which identifies the ways in which you will assist a potential client in moving from opportunity to action

P3 communicate how business and enterprise support adds value to the development of learning and skills, at a personal and business level

P4 identify the ways by which to generate opportunities so that you can engage with potential clients

P5 assess the value of different networks as a way of raising awareness of you and/or your organisation amongst potential clients as a source of trusted and responsible support

P6 keep up to date with developments in networks in the area in which you operate, including location, sector and type of customer grouping

P7 keep up to date with how innovation and creativity can be developed in others

P8 maintain contact and exchange information with other individuals and organisations supporting individuals considering starting their own business and existing businesses

P9 make sure that potential clients understand the scope of the business and enterprise support services offered by you and/or your organisation

P10 identify ways by which printed and online media will support you in raising awareness amongst potential clients as a source of trusted and responsible support

P11 follow-up professionally and promptly in response to an enquiry from a potential client

P12 maintain up to date records of contacts with potential clients

P13 identify the effectiveness of different methods used by you and/or your organisation to raise awareness amongst potential clients as a source of trusted and responsible support

P14 draw upon previous experiences to identify opportunities to support individuals considering starting their own business and existing businesses

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P15 develop relationships with other organisations who will assist you in raising awareness amongst potential clients as a source of trusted and responsible support

P16 end contact with a potential client in a way that encourages them to maintain a relationship with you going forward

CFABES001
Develop awareness amongst potential clients as a source of trusted and responsible support

Knowledge and understanding	**Generate and select opportunities**
You need to know and understand:	**K1** the contribution of business and enterprise support to learning and skills development in individuals considering starting their own business and/or existing businesses
	K2 why it is important to develop a value proposition which communicates your value as a source of support for individuals considering starting their own business and/or the development of existing businesses
	K3 different methods for recognising and selecting opportunities to support individuals considering starting their own business and/or the development of existing businesses strategies
	K4 the ways in which your previous experiences can be used to identify opportunities for supporting individuals considering starting their own business and/or existing businesses
	K5 the limitations of relying on other individuals and organisations as a source of opportunities for supporting individuals considering starting their own business and/or existing businesses
	K6 the ways of measuring the effectiveness of approaches to generating and selecting opportunities to support others used by you and/or your organisation
	K7 the relationship between opportunity recognition and selection and awareness raising
	K8 the ways of enhancing innovation and creativity in others

Awareness raising

You need to know and understand:	**K9** the effectiveness of different approaches to raising awareness of you as a trusted and responsible source of support including and reactive and proactive approaches
	K10 the role for word of mouth amongst networks and relationships as a way of raising awareness of you as a source of trusted and responsible support
	K11 how to raise awareness of you and/or your organisation as a source of support through membership organisations and networks including both sector and professional organisations and networks

K12   the need to invest time in developing networks and relationships with other organisations who provide business and enterprise support

K13   the advantages and disadvantages of printed and online media as a source of raising awareness as a source of support

K14   the ways of measuring the effectiveness of approaches to awareness raising used by you and/or your organisation

K15   why it is important to keep up to date with changes in the business and enterprise support landscape, including changes to the types of organisations, programmes of support and networks

K16   the ways of promoting contact with you and/or your organisation by potential clients

K17   how to follow-up with a potential client after they have made contact

K18   why it is important to maintain records of contacts with potential clients

K19   the sources of support for your ongoing professional development as a source of support to others

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Develop awareness amongst potential clients as a source of
trusted and responsible support

Additional information

Behaviours:

1. recognise the opportunities presented by the diversity of people
2. work to turn unexpected events into opportunities rather than threats
3. try out new ways of developing relationships with others
4. seek to understand the needs and motivations of individuals considering starting their own business and/or existing businesses
5. comply with, and ensure that others comply with, legal requirements, industry regulations, organisational policies and professional codes
6. invite a two-way exchange of information and feedback with clients and others
7. show integrity, fairness and consistency in decision making

CFABES001
Develop awareness amongst potential clients as a source of trusted and responsible support

Developed by	Skills CFA
Version number	1
Date approved	November 2013
Indicative review date	November 2016
Validity	Current
Status	Original
Originating organisation	SFEDI
Original URN	CFABES001
Relevant occupations	Higher education teaching professionals; Further education teaching professionals; Chartered and certified accountants; Management consultants and business analysts; Business and financial project management professionals; Business and related research professionals; Finance and investment analysts and advisers; Vocational and industrial trainers and instructors
Suite	Business and Enterprise Support (2013)
Key words	business; enterprise; support; clients; awareness; engagement; networks; relationships; trust

Overview

This standard is about researching the background and experiences of the client in order to effectively manage the initial interaction with the individual or business. It requires you to identify appropriate sources of information, make sense of the collected information and use this meaning in ways which assists you in developing a relationship with the client.

For the purposes of this standard, business support refers to assistance which is received from individuals or organisations outside of the business, related to a specific business problem or opportunity and/or development of the business. Enterprise support refers to assistance which is received by individuals considering starting their own business. A 'business' can mean an independent entity such as a private sector business, a social enterprise, a charitable or voluntary organisation, or a significant operating unit, with a relative degree of autonomy, within a larger organisation. It can also refer to a formal partnership where two or more businesses are working together towards common goals.

This standard is recommended for individuals and organisations providing assistance to support the development of individuals considering starting their own business and existing businesses, either on a voluntary or commercial basis.

Performance criteria

You must be able to:

P1   identify the type and range of information required about the client

P2   identify and evaluate the sources of information for their contribution to researching the background of the client

P3   approach sources of information with a clear explanation of the purpose of the research

P4   ascertain the procedures that are required to access the information

P5   specify the risks associated with the sources of information identified from the research

P6   identify any problems with the collection of necessary information and take appropriate action to deal with them

P7   access the sources of information according to agreed procedures

P8   collect information in line with the requirements of the research

P9   apply information methods correctly and consistently

P10 ensure the methods for making sense of the information are appropriate to the information and the aims of the research

P11 analyse information accurately according to the appropriate methodology

P12 make sense of the outcomes and develop suitable conclusions

P13 identify any unexpected surprises and suggest reasons for them

P14 consider creative ways of collecting information to address any gaps in what you need to know about the client

P15 present the outcomes of the research in a manner appropriate to its aims and objectives

P16 acknowledge sources of information used in undertaking the research

P17 review the progress and outcomes of the research with the appropriate people

P18 protect confidential information in accordance with agreements and procedures

P19 evaluate the success of the research against the identified objectives

P20 record the collected information and outcomes of the research in the appropriate systems

Knowledge and understanding	**Identify sources and availability of information**

You need to know and understand:

K1   why it is important to be clear about the research being undertaken

K2   what types of information are required

K3   what are the potential sources of information

K4   how the sources of information have co-operated in the past

K5   what are the access procedures for different sources of information

K6   the rules of confidentiality relating to different sources of information

K7   what are the different risks that should be considered

K8   what problems could occur and the actions required to address these problems

Collect information to achieve research objectives

You need to know and understand:

K9   what are the agreed procedures for accessing information

K10 which information collection procedures are required

K11 why it is important to apply collection methods correctly and consistently

K12 what types of problem could occur and what actions are required to address them

K13 what are the systems for recording information and the procedures relating to the use of these systems

Make sense of the information collected from the research

You need to know and understand:

K14 how to use different methods to make sense of the outcomes from the research

K15 the advantages and disadvantages of different methods for making sense of the outcomes from the research

K16 the way in which less traditional approaches can be used to make sense of the outcomes from research

K17 why it is important to provide a rationale for the results from research

K18 what types of result are expected and the possible reasons for any unexpected outcomes

K19 who should be involved in reviewing the outcomes from the research

Use the outcomes of the research

You need to know
and understand:

K20 how to present the outcomes from the research

K21 who should be involved in using the outcomes from the research

K22 what types of information should be protected

K23 what types of information may be confidential

K24 what criteria can be used to for evaluating the success of the research

K25 what types of system can be used to record the outcomes from the research and the procedures that relate to the use of these systems

Comply with guidance

You need to know
and understand:

K26 the appropriate guidance and codes of conduct relating to undertaking research and using the outcomes

K27 why it is important to comply with appropriate guidance and codes of conduct

K28 what are the consequences of not complying with appropriate guidance and codes of conduct

K29 how to obtain information on appropriate guidance and codes of conduct

Additional information

Behaviours:	1	confidence about your own knowledge and ability
	2	strive to add value by achieving results in the best way
	3	develop yourself to improve outcomes
	4	remain positive and maintain effort despite setbacks, changes or ambiguities
	5	achieve results through the guided actions of others
	6	recognise when plans need to be adapted and act accordingly
	7	respect the client's need for information, commitment and confidentiality
	8	seek to understand the needs and motivations of individuals considering starting their own business and/or existing businesses
	9	comply with, and ensure that others comply with, legal requirements, industry regulations, organisational policies and professional codes
	10	invite a two-way exchange of information and feedback with clients and others
	11	show integrity, fairness and consistency in decision making

CFABES002
Research the background and experiences of the client

Developed by	Skills CFA
Version number	2
Date approved	November 2013
Indicative review date	November 2016
Validity	Current
Status	Original
Originating organisation	SFEDI
Original URN	CFABI2
Relevant occupations	Higher education teaching professionals; Further education teaching professionals; Chartered and certified accountants; Management consultants and business analysts; Business and financial project management professionals; Business and related research professionals; Finance and investment analysts and advisers; Vocational and industrial trainers and instructors
Suite	Business and Enterprise Support (2013)
Key words	business; enterprise; support; clients; awareness; engagement; networks; relationships; trust

CFABES003
Build a relationship with the client

| Overview | This standard is about building a relationship which enables you to assist the client in progressing with a business opportunity, either in terms of considering the option of starting their own business and/or developing an existing business. It requires you to build rapport with the client, develop trust and confidence, communicate effectively so that you can find out what you need to know and review progress. |

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This standard is recommended for individuals and organisations providing assistance to support the development of individuals considering starting their own business and existing businesses, either on a voluntary or commercial basis.

Performance criteria

You must be able to:

P1   learn as much as you can about the client you are working with

P2   discuss the motivations, objectives and interests of the client you are working with to help develop empathy and rapport

P3   adapt your style of working to ensure it does not conflict with the client you are working with

P4   find an appropriate style of discussion and exchange

P5   listen fully and attentively to what you are being told

P6   check the accuracy of what has been said

P7   reflect back on what has been discussed

P8   make your point in a way that the client can appreciate and understand

P9   challenge the answers you are given and unpack the source of any misunderstandings

P10 assist the client in linking new ideas to the recognition of appropriate opportunities

P11 be aware if the client you are working with is anxious about any issue and raise the matter sensitively

P12 review with the client you are working with how they feel the relationship with you is going

P13 maintain contact and exchange information with the client, in ways that are appropriate and meet their needs

Knowledge and understanding	**Build business support relationships**

You need to know and understand:	K1	the benefits of finding out about the client you are working with
	K2	the personal and professional motivations of the client you are working with
	K3	the demands on, and the responsibilities of the client you are working with
	K4	how different people like to work
	K5	how to approach interactions with others in an open minded manner without having preconceptions of the outcome
	K6	how and when it is appropriate to review progress with the client

Interpersonal and communication skills

You need to know and understand:	K7	how to use effective interpersonal and communication skills, including, when appropriate:
	K7.1	listening fully and attentively
	K7.2	questioning
	K7.3	checking accuracy
	K7.4	summarising
	K7.5	reflecting back
	K7.6	challenging
	K7.7	respecting and acknowledging issues
	K7.8	negotiation
	K7.9	giving, receiving and passing on constructive feedback
	K7.10	dealing with difficulties
	K8	how to identify issues, anxiety or concern (both spoken or unspoken) with the client you are working with
	K9	the advantages and disadvantages of different kinds of communication in different circumstances
	K10	how new ideas may challenge the client's and your thinking

Additional information

Behaviours:

1 tailor your approach to align with the client's goals and circumstances

2 respect the client's need for information, commitment and confidentiality

3 seek the right information to make sense of a situation and draw appropriate conclusions

4 listen and respond effectively and check understanding

5 have a rigorous but impartial questioning style

6 adapt your personal style and experiences to empathise with the client

7 deliver thoughts in straightforward terms but maintain listener interest

8 have a written style that is clear and has impact

9 seek to understand the needs and motivations of the client

10 act within the limits of your authority

11 show integrity, fairness and consistency in decision making

CFABES003
Build a relationship with the client

Developed by	Skills CFA
Version number	2
Date approved	November 2013
Indicative review date	November 2016
Validity	Current
Status	Original
Originating organisation	SFEDI
Original URN	CFAIBS1
Relevant occupations	Higher education teaching professionals; Further education teaching professionals; Chartered and certified accountants; Management consultants and business analysts; Business and financial project management professionals; Business and related research professionals; Finance and investment analysts and advisers; Vocational and industrial trainers and instructors
Suite	Business and Enterprise Support (2013)
Key words	business; enterprise; support; clients; awareness; engagement; networks; relationships; trust

Overview

This standard is about maintaining a relationship with the client through having rapport with them and helping develop their trust in you and/or the organisation you work for. It requires you to exercise good listening, manage relationships with different clients, direct a client to others who will support their development and promote your services and/or those of your organisation.

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This standard is recommended for individuals and organisations providing assistance to support the development of individuals considering starting their own business and existing businesses, either on a voluntary or commercial basis.

Performance criteria

You must be able to:

P1   maintain contact and exchange information with the client, in the ways that are appropriate and meet their needs, through face to face meetings or by phone or e-mail

P2   encourage the client to judge when and how to share their views and concerns with you

P3   find a style of discussion and exchange that helps the client to be open about business matters

P4   clarify the roles and needs of different team members if you are working with a client team

P5   detect if the client is anxious about their business and raise the matter sensitively

P6   encourage the client to clearly explain what they consider their business and personal needs are and what they want to achieve, so that you can identify and arrange advice and guidance from others that may help them

P7   direct the client if they need specialist advice and guidance to those qualified to provide such support

P8   propose and promote services, including costs, that are likely to meet the clients' needs

P9   advise the client about ways of resourcing advice and guidance for new and/or existing business development and assessing returns on investment

P10   make sure that the client understands the roles and responsibilities of the support process and the limits of any contractual obligations

P11   review with the client how they feel the relationship with you is going

P12   keep up-to-date and accurate records of client contact at all stages of the relationship

P13   assure the client of confidentiality at all times

P14   end the relationship with the client in a way that encourages them to contact you in the future

CFABES004
Maintain an effective relationship with the client

Knowledge and understanding

Interpersonal and communication skills

You need to know
and understand:

K1   how to use effective interpersonal and communication skills, including, when appropriate:

     K1.1   listening fully and attentively

     K1.2   questioning

     K1.3   checking accuracy

     K1.4   summarising

     K1.5   reflecting back

     K1.6   challenging

     K1.7   respecting and acknowledging issues

     K1.8   negotiation

     K1.9   giving, receiving and passing on constructive feedback

     K1.10   dealing with difficulties

K2   the advantages and disadvantages of different kinds of communication in different circumstances

K3   how you communicate with people from different backgrounds and with different communication needs

K4   how to deal with other people's prejudices and assumptions

K5   how new ideas may challenge the client's and your thinking

Support relationships

You need to know
and understand:

K6   how to manage:

     K6.1   the conditions for clients engaging with different business support services

     K6.2   the advantages and disadvantages of working in different locations

     K6.3   what constitutes reasonable adjustments for clients with particular needs

     K6.4   the boundaries of the relationship between you and the client

     K6.5   the ways that different clients prefer to work

     K6.6   the limitations of your role and responsibilities

     K6.7   any relevant contractual obligations

K7   the limits of your own abilities and understanding of business processes and
      practices

K8   how to recognise the barriers the client is facing that will affect the success of
      their idea or business

K9   how to recognise when the client needs more specialist personal support
      and/or business advice

Funding and resources

You need to know
and understand:

K10   the types of business and enterprise support available, the referral procedures
      and any costs

K11   how to co-ordinate support services that match different client needs

K12   the funding that is available and relevant to the client's needs

K13   the procedures for accessing funding and support from other organisations

Additional information

Behaviours:

1. recognise the opportunities presented by the diversity of people
2. tailor your approach to align with the goals and circumstances of a client
3. respect the client's need for information, commitment and confidentiality
4. listen and respond effectively, and check understanding
5. adapt your personal style to empathise with the client
6. build and maintain rapport over sustained periods
7. invite a two-way exchange of information and feedback with clients and others
8. seek to understand the needs and motivations of the client
9. take and implement difficult and/or unpopular decisions, if necessary
10. act within the limits of your authority
11. show integrity, fairness and consistency in decision making

CFABES004
Maintain an effective relationship with the client

Developed by	Skills CFA
Version number	2
Date approved	November 2013
Indicative review date	November 2016
Validity	Current
Status	Original
Originating organisation	SFEDI
Original URN	CFABS1
Relevant occupations	Higher education teaching professionals; Further education teaching professionals; Chartered and certified accountants; Management consultants and business analysts; Business and financial project management professionals; Business and related research professionals; Finance and investment analysts and advisers; Vocational and industrial trainers and instructors
Suite	Business and Enterprise Support (2013)
Key words	business; enterprise; support; clients; awareness; engagement; networks; relationships; trust

Overview

This standard is about enabling the client to develop a clear picture of the feasibility of an identified business opportunity and the journey from opportunity to action. It requires you to analyse the current strengths and areas for development, at a personal and business level, identify the associated needs and introduce the client to appropriate approaches, tools and sources of support to address identified needs.

For the purposes of this standard, business support refers to assistance which is received from individuals or organisations outside of the business, related to a specific business problem or opportunity and/or development of the business. Enterprise support refers to assistance which is received by individuals considering starting their own business. A 'business' can mean an independent entity such as a private sector business, a social enterprise, a charitable or voluntary organisation, or a significant operating unit, with a relative degree of autonomy, within a larger organisation. It can also refer to a formal partnership where two or more businesses are working together towards common goals.

This standard is recommended for individuals and organisations providing assistance to support the development of individuals considering starting their own business and existing businesses, either on a voluntary or commercial basis.

Performance criteria

You must be able to:

P1   help the client to express what they think and feel about the business opportunity and the journey from opportunity to action

P2   work with the client to evaluate and explain their current personal situation and/or the business opportunity using appropriate diagnostic tools and measures

P3   work with the client to assist them in understanding the positive and negative consequences associated with not being able to progress the business opportunity

P4   help the client to obtain the information they need to review the business opportunity including the ideas of other appropriate stakeholders

P5   help the client review which parts of the identified business opportunity would benefit from change

P6   inspire the client to seek new business opportunities

P7   challenge the client to set practical, specific and, where appropriate, ambitious personal and business objectives for the near, medium and long term

P8   help the client identify obstacles to progressing the business opportunity

P9   help the client to evaluate possible changes against personal and business objectives, the risks and benefits

P10 work with the client to assist them in understanding what may be involved personally and in business terms in achieving the results they would like

P11 challenge the client to prioritise changes and identify problems to be dealt with first

P12 identify the suitable framework that the client can use to record and manage the identified changes

P13 work with the client to identify other stakeholders which need to be engaged to move from opportunity to action

P14 work with the client in a way that allows them to develop analytical and problem-solving skills for themselves

Knowledge and understanding	**Interpersonal and communication skills**

You need to know and understand:	K1	how to use effective interpersonal and communication skills, including, when appropriate:

      K1.1   listening fully and attentively

      K1.2   questioning

      K1.3   checking accuracy

      K1.4   summarising

      K1.5   reflecting back

      K1.6   challenging

      K1.7   respecting and acknowledging issues

      K1.8   negotiation

      K1.9   giving, receiving and passing on constructive feedback

      K1.10   dealing with difficulties

K2   the advantages and disadvantages of different kinds of communication in different circumstances

K3   how new ideas may challenge the client's and your thinking

Analyse business opportunities

You need to know and understand:	K4	how to profile the personal strengths, weaknesses and motivations of the client

K5   tools and techniques for assessing the feasibility of business opportunities

K6   common problems and opportunities individuals considering starting their own business and/or existing small businesses may face

K7   how failure to progress the business opportunity can be a positive outcome

K8   different social, cultural and religious approaches to business

K9   how to assess the contribution of different stakeholders in moving from opportunity to action

K10 business performance data analysis and performance measures

K11 qualitative and quantitative analytical and diagnostic techniques

K12 market and product appraisal, pricing and evaluation tools and techniques

K13 methods for evaluating production processes and techniques

K14 financial appraisal techniques

K15   risk assessment techniques

Analyse business models and business planning

You need to know
and understand:

K16   the key building blocks of a business model

K17   the advantages and disadvantages of different business models

K18   the similarities and differences between private businesses and social
       enterprises

K19   the differences between business models and business plans

K20   how to define business objectives, actions, organisational structures, roles and
       responsibilities

K21   development, presentation and use of business plans

K22   how to identify trends and developments that may impact upon the feasibility of
       a business opportunity

K23   barriers and challenges to improving personal and business performance
       including investment in learning and skills development

K24   how to improve competitiveness of a business opportunity and the benefits and
       drawbacks of different kinds of competition

K25   sources of new opportunities including networking and collaboration with others

K26   how to consider the business benefits of engaging with equality and diversity

K27   how to stimulate change in the business practices of the client

K28   how to build support among stakeholders for supporting the client in moving
       from opportunity to action

Governance of a business

You need to know
and understand:

K29   the range of legal and governance structures available to individuals wishing to
       start their own business and existing small businesses

K30   business, financial and legal rules and regulations of being in business

Business and enterprise support

You need to know
and understand:

K31   the dynamics of business support relationships

K32   the limits of your own skills and knowledge

K33   the guidelines for providing business and enterprise support, where

appropriate, set by your organisation or professional body including:

K33.1   maintaining confidentiality in different working environments

K33.2   ethics, values and professional standards

K33.3   equal opportunities, diversity and social inclusion

K33.4   different types of advice and guidance which can be accessed by a

client

K33.5   using information management systems

K33.6   procedures for quality assurance and handling complaints

K34   the features and benefits of the services you provide, and those of any other

services that you direct clients to

Additional information

Behaviours:

1   recognise the opportunities presented by the diversity of people

2   tailor your approach to align with the goals and circumstances of the client

3   seek to understand people's needs and motivations

4   respect the client's need for information, commitment and confidentiality

5   think strategically and take a holistic view of the way forward

6   seek the right information to analyse a situation and draw sound conclusions

7   generate justifiable alternatives to solve a problem or reach an outcome

8   apply your knowledge and experience effectively, yet remain open to exploring new ideas

9   have a rigorous but impartial questioning style

10 act within the limits of your authority

11 show integrity, fairness and consistency in decision making

CFABES005
Help the client to analyse the business opportunity

Developed by	Skills CFA
Version number	2
Date approved	November 2013
Indicative review date	November 2016
Validity	Current
Status	Original
Originating organisation	SFEDI
Original URN	CFABS2
Relevant occupations	Higher education teaching professionals; Further education teaching professionals; Chartered and certified accountants; Management consultants and business analysts; Business and financial project management professionals; Business and related research professionals; Finance and investment analysts and advisers; Vocational and industrial trainers and instructors
Suite	Business and Enterprise Support (2013)
Key words	business; enterprise; support; clients; awareness; engagement; networks; relationships; trust

Overview	This standard is about reflecting and drawing upon your own experiences and expertise to assist the client in moving from opportunity to action. It requires you to clarify what the client is looking to achieve, explain issues and concepts related to moving from opportunity to action and ensure that you recognise the limits of your own experiences and expertise.

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Use personal experience and expertise to identify the needs of the client

Performance criteria

You must be able to:

P1 encourage the client to explain clearly what they want to achieve from considering starting their own business or developing the business

P2 identify what is needed and expected from you as a source of support

P3 communicate what you can deliver to support the client in moving from opportunity to action

P4 use your experience and knowledge in the most appropriate way to help the client in moving from opportunity to action

P5 explain issues and concepts in your area of expertise in a way that the client can use in moving from opportunity to action

P6 identify and recognise when the relationship with the client is going well

P7 identify when the relationship with the client is not working and take appropriate action

P8 identify when the needs and requirements of the client are outside your experiences and area of expertise

P9 work with the client to introduce others when your experiences and expertise are unable to address the needs and requirements of the client

Knowledge and understanding	**Interpersonal and communication skills**

You need to know and understand:

K1   how to use effective interpersonal and communication skills, including, when appropriate:

K1.1   listening fully and attentively

K1.2   questioning

K1.3   checking accuracy

K1.4   summarising

K1.5   reflecting back

K1.6   challenging

K1.7   respecting and acknowledging issues

K1.8   negotiation

K1.9   giving, receiving and passing on constructive feedback

K1.10   dealing with difficulties

K2   the advantages and disadvantages of different kinds of communication in different circumstances

K3   how new ideas may challenge the client's and your thinking

Work with others

You need to know and understand:

K4   how to set clear expectations of what the client and you anticipate to achieve from the relationship

K5   how to take account of:

K5.1   the boundaries of the relationship between you and the client you are working with

K5.2   the limitations of your role and responsibilities as a source of support

K5.3   the different ways people like to work

K6   how and when it is appropriate to review progress with the client

Reflect on your own experience and expertise

You need to know and understand:

K7   the aspects of your experience that can add value to the advice and guidance you offer to individuals considering starting their own business and/or existing

CFABES006
Use personal experience and expertise to identify the needs
of the client

businesses

K8   the limits of your own knowledge, experience and expertise

K9   how to recognise when the client you are working with requires more specialist personal and/or business advice and guidance

K10 when and where to access additional sources of support to address specific needs and requirements of the client

K11 the sources of support for your ongoing professional development

CFABES006
Use personal experience and expertise to identify the needs
of the client

Additional information

Behaviours:

1   tailor your approach to align with the goals and circumstances of the client

2   respect the client's need for information, commitment and confidentiality

3   gain respect of the client by operating in a professional and credible manner

4   develop cooperation by considering the perspective of others

5   handle disagreements or resistance constructively and fairly

6   apply experience and expertise effectively, yet be open to exploring new ideas

7   identify the key "how to's" which need to be addressed by the client

8   listen and respond effectively, and check understanding

9   have a rigorous but impartial questioning style

10 adapt your personal style to empathise with a whole range of clients

11 build and maintain rapport over sustained periods

12 invite a two-way exchange of information and feedback with the client and others

CFABES006
Use personal experience and expertise to identify the needs of the client

Developed by	Skills CFA
Version number	2
Date approved	November 2013
Indicative review date	November 2016
Validity	Current
Status	Original
Originating organisation	SFEDI
Original URN	CFAIBS2
Relevant occupations	Higher education teaching professionals; Further education teaching professionals; Chartered and certified accountants; Management consultants and business analysts; Business and financial project management professionals; Business and related research professionals; Finance and investment analysts and advisers; Vocational and industrial trainers and instructors
Suite	Business and Enterprise Support (2013)
Key words	business; enterprise; support; clients; awareness; engagement; networks; relationships; trust

CFABES007
Apply your knowledge and experience of business and its core functions

Overview

This standard is about applying your knowledge and experience of business and enterprise to support the personal and business development of the client. This includes strategy, money, customers, people and skills, business processes and laws and regulations. You also need to understand how they link to and support each other. Alongside this understanding of business development, you will also need experience or practical knowledge of the competing demands, pressures, and motivations of the client you are working with, whether they are considering starting their own business or developing and growing a small business.

For the purposes of this standard, business support refers to assistance which is received from individuals or organisations outside of the business, related to a specific business problem or opportunity and/or development of the business. Enterprise support refers to assistance which is received by individuals considering starting their own business. A 'business' can mean an independent entity such as a private sector business, a social enterprise, a charitable or voluntary organisation, or a significant operating unit, with a relative degree of autonomy, within a larger organisation. It can also refer to a formal partnership where two or more businesses are working together towards common goals.

This standard is recommended for individuals and organisations providing assistance to support the development of individuals considering starting their own business and existing businesses, either on a voluntary or commercial basis.

Performance criteria

You must be able to:

P1   encourage the client to explain clearly what they want to achieve from considering starting their own business or developing the business

P2   use your experience and knowledge in the most appropriate way to help the client in moving from opportunity to action

P3   explain issues and concepts in a way that the client can use in moving from opportunity to action

P4   identify when the needs and requirements of the client are outside your knowledge and experiences

P5   work with the client to introduce others when your knowledge and experiences are unable to address the needs and requirements of the client

Knowledge and understanding	**Strategy and planning**	
You need to know and understand:	K1	the current performance of a business and future ambitions and plans
	K2	business planning processes
	K3	how to establish success factors for the client
	Money and finances	
You need to know and understand:	K4	how to work out financial requirements of the client in moving from opportunity to action
	K5	sources of funding and the accessibility criteria
	K6	planning, monitoring and recording of cash flow
	K7	basic accounting terms and practices and the basic rules regarding business taxation
	Customers	
You need to know and understand:	K8	how to research a market for a business opportunity
	K9	ways of gaining insights into the needs of potential customers
	K10	ways of delivering a good customer service and measuring and monitoring it
	Business and enterprise experience	
You need to know and understand:	K11	the emotional investment entrepreneurs make in their businesses
	K12	the key "how to's" associated with being in business and the ways in which they link to and support each other
	K13	what it takes to successfully start and run a business
	K14	the competing demands and pressures when running a small business
	K15	the diverse capabilities required in being enterprising including calculated risk-taking, dealing with uncertainty and ambiguity, managing networks and relationships and learning by doing
	K16	the time, energy and commitment required in running a small business
	K17	when and how to apply the principles of running a business in practice

People and skills development

You need to know and understand:

K18 how recruitment and selection methods used by small businesses differ from larger businesses

K19 approaches to people management in small businesses

K20 sources of advice and guidance, and the associated accessibility criteria, to address learning and skills development needs of the client

K21 the relationship between the development of the owner-manager and the development of their business

K22 the landscape for learning and skills development support at a national, regional and local level

Business processes and practices

You need to know and understand:

K23 the ways in which small businesses develop new markets

K24 the advantages and disadvantages of different methods for raising awareness and generating orders

K25 product and service development processes in small businesses

K26 the ways in which technology can be used to support business processes and practices

K27 how the approaches to acquiring and managing resources differs between small and large businesses

K28 quality control and quality assurance techniques

Business models

You need to know and understand:

K29 the different business models which can be used to move from opportunity to action including privately-owned for profit businesses, social enterprises and replicated businesses models

K30 the advantages and disadvantages of different legal structures for being in business

Laws and regulations

You need to know and understand:	K31	the legal and regulatory requirements associated with being in business including health and safety, environmental and equality and diversity
	K32	what are the thresholds associated with appropriate laws and regulations applying to being in business
	K33	terms and conditions relating to dealing with customers, suppliers and other stakeholders
	K34	sources of advice and guidance on the legislative and statutory requirements related to contracts and agreements
	K35	the advantages and disadvantages of different ways of protecting a business idea and intellectual property
	K36	when to refer a client to a professional adviser for specific advice and guidance

Additional information

Behaviours:

1 tailor your approach to align with the goals and circumstances of the client

2 gain respect of the client by operating in a professional and credible manner

3 develop cooperation by considering the perspective of others

4 apply experience and expertise effectively, yet be open to exploring new ideas

5 identify the key "how to's" which need to be addressed by the client

6 listen and respond effectively, and check understanding

7 have a rigorous but impartial questioning style

8 adapt your personal style to empathise with a whole range of clients

9 build and maintain rapport over sustained periods

10 invite a two-way exchange of information and feedback with the client and others

CFABES007
Apply your knowledge and experience of business and its core functions

Developed by	Skills CFA
Version number	2
Date approved	November 2013
Indicative review date	November 2016
Validity	Current
Status	Original
Originating organisation	SFEDI
Original URN	CFAIBS5
Relevant occupations	Higher education teaching professionals; Further education teaching professionals; Chartered and certified accountants; Management consultants and business analysts; Business and financial project management professionals; Business and related research professionals; Finance and investment analysts and advisers; Vocational and industrial trainers and instructors
Suite	Business and Enterprise Support (2013)
Key words	business; enterprise; support; clients; awareness; engagement; networks; relationships; trust

Overview

This standard is about developing a clear picture of the objectives of the client you are working with and making sure those objectives are agreed with them. It requires you to know how to set objectives, identify potential risks involved in setting and agreeing objectives with the client, review the resources required to achieve the objectives and identify ways by which to review progress towards achievement of the objectives.

For the purposes of this standard, business support refers to assistance which is received from individuals or organisations outside of the business, related to a specific business problem or opportunity and/or development of the business. Enterprise support refers to assistance which is received by individuals considering starting their own business. A 'business' can mean an independent entity such as a private sector business, a social enterprise, a charitable or voluntary organisation, or a significant operating unit, with a relative degree of autonomy, within a larger organisation. It can also refer to a formal partnership where two or more businesses are working together towards common goals.

This standard is recommended for individuals and organisations providing assistance to support the development of individuals considering starting their own business and existing businesses, either on a voluntary or commercial basis.

Performance criteria

You must be able to:

P1   set practical and achievable objectives with the client

P2   encourage and support the client to make practical judgements on what is essential, important and preferred and prioritise objectives accordingly

P3   negotiate a programme of action with the client that is not too prescriptive

P4   identify obstacles that may hamper progress towards achievement of agreed objectives

P5   evaluate what are the challenges and opportunities in achievement of the agreed objectives

P6   assess strengths and weaknesses and threats and opportunities at a personal and/or business level which may impact upon achievement of agreed objectives

P7   plan what resources are needed to achieve the agreed objectives and the ways by which the client can secure them

P8   identify and work with others who can help realise the objectives

P9   assist the client to secure access to other relevant sources of support which will support achievement of agreed objectives

P10   identify opportunities to redefine the objectives of the client, at a personal and business level

Knowledge and understanding	**Interpersonal and communication skills**

You need to know and understand:

K1 how to use effective interpersonal and communication skills, including, when appropriate:

    K1.1 listening fully and attentively

    K1.2 questioning

    K1.3 checking accuracy

    K1.4 summarising

    K1.5 reflecting back

    K1.6 challenging

    K1.7 respecting and acknowledging issues

    K1.8 negotiation

    K1.9 giving, receiving and passing on constructive feedback

    K1.10 dealing with difficulties

K2 the advantages and disadvantages of different kinds of communication in different circumstances

K3 how new ideas may challenge the client's and your thinking

Analysis and planning

You need to know and understand:

K4 what the client would like to achieve in considering starting their own business and/or developing an existing business

K5 what is involved in achieving the agreed objectives including access to resources, commitment of the other people, learning and skills development and access to knowledge and information

K6 how to evaluate the potential obstacles to progress towards the agreed objectives by the client

K7 the advantages and disadvantages of the techniques and tools which can be used to assess the benefits and risks associated with a business opportunity

K8 the resources available to meet agreed objectives

K9 how to manage change that may result from achieving the agreed objectives, in terms of personal and/or business development level

K10 ways by which to work the client to redefine objectives, at a personal and/or

business level

K11   the limits of your own skills and knowledge

K12   when and where to introduce a client to other sources of support

Additional information

Behaviours:

1   respect the client's need for information, commitment and confidentiality

2   think strategically, taking a holistic view of the way forward

3   seek the right information to analyse a situation and draw appropriate conclusions

4   generate justifiable alternatives to solve a problem or reach an outcome

5   apply knowledge and experience effectively, yet be open to exploring new ideas

6   listen and respond effectively and check understanding

7   have a rigorous but impartial questioning style

8   effectively link objectives and actions to an overall direction of travel

9   prioritise and schedule to ensure optimum use of time and resource

10   recognise when plans need to be adapted and act accordingly

11   invite a two-way exchange of information and feedback with the client and from others

12   remain positive and maintain effort despite setbacks, changes or ambiguities

13   work to turn unexpected events into opportunities rather than threats

14   act within the limits of your authority

CFABES008
Help the client to set and agree objectives

Developed by	Skills CFA
Version number	2
Date approved	November 2013
Indicative review date	November 2016
Validity	Current
Status	Original
Originating organisation	SFEDI
Original URN	CFAIBS4
Relevant occupations	Higher education teaching professionals; Further education teaching professionals; Chartered and certified accountants; Management consultants and business analysts; Business and financial project management professionals; Business and related research professionals; Finance and investment analysts and advisers; Vocational and industrial trainers and instructors
Suite	Business and Enterprise Support (2013)
Key words	business; enterprise; support; clients; awareness; engagement; networks; relationships; trust

Overview

This standard is about developing the client's autonomy so that they can act for themselves in moving from opportunity to action. It requires you to challenge and facilitate the client to develop new ways of working on their business opportunity and invest in developing learning and skills to build their commitment to action. It also requires you to be able to adopt an appropriate mode of intervention when you are working with the client.

For the purposes of this standard, business support refers to assistance which is received from individuals or organisations outside of the business, related to a specific business problem or opportunity and/or development of the business. Enterprise support refers to assistance which is received by individuals considering starting their own business. A 'business' can mean an independent entity such as a private sector business, a social enterprise, a charitable or voluntary organisation, or a significant operating unit, with a relative degree of autonomy, within a larger organisation. It can also refer to a formal partnership where two or more businesses are working together towards common goals.

This standard is recommended for individuals and organisations providing assistance to support the development of individuals considering starting their own business and existing businesses, either on a voluntary or commercial basis.

Performance criteria

You must be able to:

P1   work with the client to identify their:

     P1.1   personal and business development aspirations

     P1.2   style of learning

     P1.3   obstacles and stated and unstated objections to changing their ways of working or doing business

     P1.4   levels of self-efficacy

P2   where appropriate, challenge the objections of the client to change in terms of personal and/or business development

P3   work with the client to identify the know-how that would enable them to develop new opportunities for the business and/or new ways of working

P4   agree with the client the ways of learning that will be effective in moving from opportunity to action

P5   use a mode of intervention that will be effective for the client at each stage of the relationship

P6   use appropriate ways of learning and consulting when providing business and enterprise support services to the client

P7   support the clients' access to resources that will assist them in moving from opportunity to action

P8   help the client to resolve personal and interpersonal issues that might otherwise be obstacles to change at a personal and/or business development level

P9   question the client to assist them in reflecting on the level of confidence in their own abilities

P10   encourage and reinforce the client in putting any identified changes into action by providing feedback

Knowledge and understanding	**Interpersonal and communication skills**

You need to know and understand:	K1	how to use effective interpersonal and communication skills, including, when appropriate:

K1.1   listening fully and attentively

K1.2   questioning

K1.3   checking accuracy

K1.4   summarising

K1.5   reflecting back

K1.6   challenging

K1.7   respecting and acknowledging issues

K1.8   negotiation

K1.9   giving, receiving and passing on constructive feedback

K1.10   dealing with difficulties

K2   the advantages and disadvantages of different kinds of communication in different circumstances

K3   how new ideas may challenge the client's and your thinking

Support relationships

You need to know and understand:

K4   you need to understand and take account of:

K4.1   the conditions for accepting the client onto different programmes of business and enterprise support

K4.2   the benefits and challenges of working in different physical locations

K4.3   the boundaries of the relationship between you and the client

K4.4   the ways that different clients prefer to work

K4.5   the limitations of your role and responsibilities

K4.6   any relevant contractual obligations

K5   the limits of your own abilities and understanding of business practice

Provide support services

You need to know   K6   how to respond to the client's values, ways of thinking and personal and/or

and understand:	business development needs

Support client development

You need to know
and understand:

K7   how to identify and address the effects that low confidence, poor work discipline or self imposed limiting beliefs can have on the client in moving from opportunity to action

K8   how to identify and deal with the effects that gender, race, age, disability and sexual orientation can have on the client moving from opportunity to action

K9   how to identify and deal with the effects that a reliance on benefits and/or working around dependents can have on the client moving from opportunity to action

K10 how to develop the client's self-confidence

K11 how to work with the client to help them to develop skills that will improve their ability to compete with other businesses

K12 the type of organisations who can provide advice and guidance on employment and welfare support

K13 the theories and application of learning styles including Kolb's learning cycle

K14 what influences and obstacles there may be on changing personal working or business practices

K15 the principles and practices of different modes of consulting

Additional information

Behaviours:

1 recognise the opportunities presented by the diversity of people

2 seek to understand the needs and motivations of the client

3 tailor your approach to align with the goals and circumstances of the client

4 gain respect by operating in a professional and credible manner

5 handle disagreements or resistance constructively and fairly

6 remain positive and maintain the relationship with a client despite setbacks, changes or ambiguities

7 act within the limits of your authority

8 show integrity, fairness and consistency in decision making

9 achieve results through the guided actions of others

10 ask for support from specialists when you are not sure what to do

CFABES009
Encourage the client to act for themselves

Developed by	Skills CFA
Version number	2
Date approved	November 2013
Indicative review date	November 2016
Validity	Current
Status	Original
Originating organisation	SFEDI
Original URN	CFABS4
Relevant occupations	Higher education teaching professionals; Further education teaching professionals; Chartered and certified accountants; Management consultants and business analysts; Business and financial project management professionals; Business and related research professionals; Finance and investment analysts and advisers; Vocational and industrial trainers and instructors
Suite	Business and Enterprise Support (2013)
Key words	business; enterprise; support; clients; awareness; engagement; networks; relationships; trust

Overview

This standard is about enabling the client to develop achievable action plans to make changes to the identified business opportunity and to access any additional support and resources that may be required to implement the changes. It requires you to review the plan or strategy for addressing the business opportunity, agree your role in working with the client to implement changes and identify actions required to be undertaken by the client to address areas for personal or business development.

For the purposes of this standard, business support refers to assistance which is received from individuals or organisations outside of the business, related to a specific business problem or opportunity and/or development of the business. Enterprise support refers to assistance which is received by individuals considering starting their own business. A 'business' can mean an independent entity such as a private sector business, a social enterprise, a charitable or voluntary organisation, or a significant operating unit, with a relative degree of autonomy, within a larger organisation. It can also refer to a formal partnership where two or more businesses are working together towards common goals.

This standard is recommended for individuals and organisations providing assistance to support the development of individuals considering starting their own business and existing businesses, either on a voluntary or commercial basis.

Performance criteria

You must be able to:

P1 evaluate the client's readiness to implement changes to the identified business opportunity

P2 work with the client to develop the necessary commitment to implement changes to the identified business opportunity

P3 identify the client's stated or unstated objections to change and propose alternative perspectives

P4 encourage the client to recognise the benefits of change to personal and/or business development

P5 work with the client to prioritise specific actions against personal and business objectives

P6 support the client to reflect on what may be involved in achieving the results they would like in moving from opportunity to action

P7 help the client identify others who can help to implement changes to the identified business opportunity

P8 clarify how you will work with the client to support them in gaining access to any additional support and resources needed to implement changes to the identified business opportunity

P9 encourage the client to develop and evaluate a programme of action including:

    P9.1 setting goals for the near and mid-term

    P9.2 identifying actions and timescales

    P9.3 identifying what resources will be needed, where they will come from and how they will be used

    P9.4 assigning roles and responsibilities

    P9.5 managing risks

    P9.6 monitoring performance

P10 agree with the client the role that you will play in supporting the programme of action

P11 encourage the client to consult with and get buy-in from other stakeholders who will be involved in the programme of action

P12 monitor the implementation of the programme of action with the client and, where appropriate, support them in dealing with contingencies and re-planning

Knowledge and understanding	**Interpersonal and communication skills**

You need to know and understand:

K1   how to use effective interpersonal and communication skills, including, when appropriate:

      K1.1   listening fully and attentively

      K1.2   questioning

      K1.3   checking accuracy

      K1.4   summarising

      K1.5   reflecting back

      K1.6   challenging

      K1.7   respecting and acknowledging issues

      K1.8   negotiation

      K1.9   giving, receiving and passing on constructive feedback

      K1.10   dealing with difficulties

K2   the advantages and disadvantages of different kinds of communication in different circumstances

K3   how new ideas may challenge the client's and your thinking

Support client development

You need to know and understand:

K4   how to judge the readiness and commitment of the client to making changes to the identified business opportunity

K5   how to combine and co-ordinate other sources of support which may assist the client in moving from opportunity to action

K6   why it is important to understand the client's values, ways of thinking and personal and/or business needs

K7   the advantages and disadvantages of different ways of developing the client's self-confidence and self-efficacy

K8   how to assist the client's decision making in a way which promotes their autonomy

K9   methods for working with the client to review and develop skills that will improve their ability to implement change effectively

K10 how to delegate effectively

Provide support services

<table>
<tr><td>You need to know
and understand:</td><td>K11</td><td colspan="2">the dynamics of business and enterprise support relationships and interdependencies in networks</td></tr>
<tr><td></td><td>K12</td><td colspan="2">the limits of your own skills and knowledge</td></tr>
<tr><td></td><td>K13</td><td colspan="2">the guidelines for providing business and enterprise support, where appropriate, set by your organisation or professional body including:</td></tr>
<tr><td></td><td></td><td>K13.1</td><td>maintaining confidentiality in different working environments</td></tr>
<tr><td></td><td></td><td>K13.2</td><td>ethics, values and professional standards</td></tr>
<tr><td></td><td></td><td>K13.3</td><td>equal opportunities, diversity and social inclusion</td></tr>
<tr><td></td><td></td><td>K13.4</td><td>different types of advice and guidance which can be accessed by a client</td></tr>
<tr><td></td><td></td><td>K13.5</td><td>using information management systems</td></tr>
<tr><td></td><td></td><td>K13.6</td><td>procedures for quality assurance and handling complaints</td></tr>
<tr><td></td><td>K14</td><td colspan="2">the features and benefits of the support you provide and those of any other support services that you may direct the client to</td></tr>
</table>

Problem-solving

<table>
<tr><td>You need to know
and understand:</td><td>K15</td><td colspan="2">how to solve business problems, by:</td></tr>
<tr><td></td><td></td><td>K15.1</td><td>identifying possible challenges and opportunities</td></tr>
<tr><td></td><td></td><td>K15.2</td><td>monitoring and evaluating progress</td></tr>
<tr><td></td><td></td><td>K15.3</td><td>evaluating the advantages and disadvantages of different decisions</td></tr>
<tr><td></td><td>K16</td><td colspan="2">how to generate options which are appropriate to the personal and business context of the client</td></tr>
<tr><td></td><td>K17</td><td colspan="2">how to challenge the client in overcoming obstacles and barriers to the implementation of change</td></tr>
<tr><td></td><td>K18</td><td colspan="2">why it is important to support the client in dealing with problems and difficulties that may exist in achieving solutions</td></tr>
</table>

Action planning

<table>
<tr><td>You need to know
and understand:</td><td>K19</td><td>how to enable the client to plan, set objectives and decide what is important</td></tr>
<tr><td></td><td>K20</td><td>the ways of working with the client in identifying and considering alternative</td></tr>
</table>

ways of implementing change

K21 the tools which can be used by the client to assess risk-benefit comparisons

K22 how to engage the client with contingency planning and risk assessment

K23 what may be involved in achieving the results the client would like to see

Additional information

Behaviours:

1   respect the client's need for information, commitment and confidentiality

2   engender co-operation by considering the perspective of others

3   apply your experience and expertise effectively, yet being open to exploring new ideas

4   think strategically, taking a holistic view of the way forward

5   effectively link objectives and actions to an overall strategy

6   prioritise and schedule to ensure optimum use of time and resource

7   recognise when plans and programmes of action need to be adapted and act accordingly

8   remain positive and maintaining effort despite setbacks, changes or ambiguities

9   achieve results through empowering the client

10 act within the limits of your authority

11 show integrity, fairness and consistency in decision making

CFABES010
Enable the client to implement changes

Developed by	Skills CFA
Version number	2
Date approved	November 2013
Indicative review date	November 2016
Validity	Current
Status	Original
Originating organisation	SFEDI
Original URN	CFABS3
Relevant occupations	Higher education teaching professionals; Further education teaching professionals; Chartered and certified accountants; Management consultants and business analysts; Business and financial project management professionals; Business and related research professionals; Finance and investment analysts and advisers; Vocational and industrial trainers and instructors
Suite	Business and Enterprise Support (2013)
Key words	business; enterprise; support; clients; awareness; engagement; networks; relationships; trust

CFABES011
Help the client reflect on the link between improved
performance and the investment in learning and skills
development

Overview

This standard is about supporting the client in identifying how developing and investing in learning and skills can impact upon personal and business development. It requires you to identify specific learning and skills development opportunities, reflect upon the potential benefits and challenges involved, discuss ways of addressing these benefits and challenges with the client and agree the resources that are required.

For the purposes of this standard, business support refers to assistance which is received from individuals or organisations outside of the business, related to a specific business problem or opportunity and/or development of the business. Enterprise support refers to assistance which is received by individuals considering starting their own business. A 'business' can mean an independent entity such as a private sector business, a social enterprise, a charitable or voluntary organisation, or a significant operating unit, with a relative degree of autonomy, within a larger organisation. It can also refer to a formal partnership where two or more businesses are working together towards common goals.

This standard is recommended for individuals and organisations providing assistance to support the development of individuals considering starting their own business and existing businesses, either on a voluntary or commercial basis.

CFABES011 Help the client reflect on the link between improved performance and the investment in learning and skills development

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Help the client reflect on the link between improved performance and the investment in learning and skills development

Performance

criteria

You must be able to:

P1   understand the aspirations of the client and the role that learning and skills development can play in meeting these aspirations

P2   encourage the client to raise their personal and business aspirations through learning and skills development

P3   outline the value added that learning and skills development can play in working through different scenarios around moving from opportunity to action

P4   present a business case for promoting learning and skills development

P5   understand the client's skill needs and suggest appropriate solutions

P6   use appropriate tools with the client to identify areas of skills gaps and shortages at a personal and/or business level

P7   propose how addressing identified learning and skill needs will add value to the business

P8   work with the client to map skill needs to appropriate solutions

CFABES011
Help the client reflect on the link between improved performance and the investment in learning and skills development

Knowledge and understanding	**Interpersonal and communication skills**

You need to know and understand:	K1	how to use effective interpersonal and communication skills, including, when appropriate:

- K1.1   listening fully and attentively
- K1.2   questioning
- K1.3   checking accuracy
- K1.4   summarising
- K1.5   reflecting back
- K1.6   challenging
- K1.7   respecting and acknowledging issues
- K1.8   negotiation
- K1.9   giving, receiving and passing on constructive feedback
- K1.10   dealing with difficulties

K2   the advantages and disadvantages of different kinds of communication in different circumstances

K3   how new ideas may challenge the client's and your thinking

Analyse implications

You need to know and understand:

K4   what the client would like to achieve

K5   how to identify the implications for learning and skills development in achieving the stated objectives

K6   how to evaluate the potential obstacles to progress

K7   the techniques for assessing the risks associated with investing in learning and skills development

K8   the resources available to support learning and skills development

K9   the limits of your own skills and knowledge

K10   when and where to direct the client to other sources of support

CFABES011 Help the client reflect on the link between improved performance and the investment in learning and skills development

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Help the client reflect on the link between improved performance and the investment in learning and skills development

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Additional information

Behaviours:

1 try out new ways of working

2 recognise the opportunities presented by the diversity of people

3 respect the client's need for information, commitment and confidentiality

4 think strategically, taking a holistic view of the way forward

5 seek the right information to analyse a situation and draw appropriate conclusions

6 generate justifiable alternatives to solve a problem or reach an outcome

7 work to turn unexpected events into opportunities rather than threats

CFABES011 Help the client reflect on the link between improved performance and the investment in learning and skills development

67

CFABES011
Help the client reflect on the link between improved performance and the investment in learning and skills development

Developed by	Skills CFA
Version number	2
Date approved	November 2013
Indicative review date	November 2016
Validity	Current
Status	Original
Originating organisation	SFEDI
Original URN	CFABES011
Relevant occupations	Higher education teaching professionals; Further education teaching professionals; Chartered and certified accountants; Management consultants and business analysts; Business and financial project management professionals; Business and related research professionals; Finance and investment analysts and advisers; Vocational and industrial trainers and instructors
Suite	Business and Enterprise Support (2013)
Key words	business; enterprise; support; clients; awareness; engagement; networks; relationships; trust

CFABES011 Help the client reflect on the link between improved performance and the investment in learning and skills development

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Overview

This standard is about recognising the influence and value added of the support offered by you and/or your organisation to the client in moving from opportunity to action. It requires you to identify ways that the support offered by you and/or your organisation could be enhanced and reflect upon the implications for management of the relationship with the client in the near-term.

For the purposes of this standard, business support refers to assistance which is received from individuals or organisations outside of the business, related to a specific business problem or opportunity and/or development of the business. Enterprise support refers to assistance which is received by individuals considering starting their own business. A 'business' can mean an independent entity such as a private sector business, a social enterprise, a charitable or voluntary organisation, or a significant operating unit, with a relative degree of autonomy, within a larger organisation. It can also refer to a formal partnership where two or more businesses are working together towards common goals.

This standard is recommended for individuals and organisations providing assistance to support the development of individuals considering starting their own business and existing businesses, either on a voluntary or commercial basis.

Performance

criteria

You must be able to:
P1 agree with the client how often to review progress in working with you and in how much detail

P2 develop appropriate measures of the performance of the support provided by you to the client

P3 encourage the client to review their progress against the programme of action

P4 encourage the client to assess the impact and value added of the support intervention on the business opportunity and the business

P5 work with the client to identify any concerns or problems with the support programme

P6 investigate any problems with the support provided by you and take action to solve problems within your area of responsibility or direct the client to the appropriate people, where the problem lies outside the limits of your responsibility

P7 agree with the client how to improve an element of the support provided by you and make changes that will enhance the effectiveness of your support

P8 regularly reflect on the business and enterprise support provided by you and/or your organisation

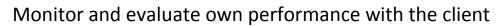|	
Knowledge and understanding	**Performance monitoring techniques**
You need to know and understand:	K1 why it is important to monitor the support services provided to the client by you
	K2 how to apply informal and formal ways of monitoring the progress and quality of the support provided by you against the standards set by you, your organisation and/or an appropriate professional body
	K3 the limitations of self-appraisal
	K4 how the type of client and their personal and business needs can affect your performance
	K5 any performance goals set by your organisation
	K6 how to evaluate feedback from the client
	Monitor support services
You need to know and understand:	K7 what are the drivers to personal and business development
	K8 the importance of establishing and applying appropriate measures for evaluating the performance of business support services provided to the client
	K9 the value of a customer focused culture in offering services to the client
	K10 the importance of finding out the cause and effects of problems and changes
	K11 what are the principles and processes of effective communication and how to apply them
	K12 how to establish systems for collecting and assessing information on the overall performance of the support services provided by you and/or your organisation
	K13 how to use the insights from monitoring the support services provided by you to identify opportunities where performance could be improved
	K14 the approaches to benchmarking the performance of the services provided by you and/or your organisation against others and the ways of addressing the outcomes
	K15 how to select and use appropriate methods for evaluating the support programme provided by you to the client
	K16 the guidelines for evaluating services set by your organisation or professional body including:

K16.1 the conditions and measures of economy, efficiency, effectiveness, value for money and quality

K16.2 the effect of financial and time limits

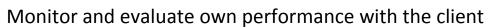K16.3 any local or regional priorities and problems

Additional information

Behaviours:

1   identify people's information needs

2   seek to understand people's needs and motivations

3   appreciate how a business operates in different client sectors

4   tailor your approach to align with the goals and circumstances of the client

5   think strategically and take a holistic view of the way forward

6   apply your experience and expertise effectively, whilst being open to exploring new ideas

7   comply with, and ensure that others comply with, legal requirements, industry regulations, organisational policies and professional codes

8   act within the limits of your authority

9   show integrity, fairness and consistency in decision making

CFABES012
Monitor and evaluate own performance with the client

Developed by	Skills CFA
Version number	2
Date approved	November 2013
Indicative review date	November 2016
Validity	Current
Status	Original
Originating organisation	SFEDI
Original URN	CFABS8
Relevant occupations	Higher education teaching professionals; Further education teaching professionals; Chartered and certified accountants; Management consultants and business analysts; Business and financial project management professionals; Business and related research professionals; Finance and investment analysts and advisers; Vocational and industrial trainers and instructors
Suite	Business and Enterprise Support (2013)
Key words	business; enterprise; support; clients; awareness; engagement; networks; relationships; trust

CFABES013
Develop own networks and relationships to provide access to information, support and resources

Overview

This standard is about developing and using personal networks and relationships to help you in providing a wide range of information, support and resources that will support the client in moving from opportunity to action. It requires you to review your own networks and networking activity, identify how your networks and relationships can add value to the personal and business development of the client and facilitate introductions between clients that have had similar experiences in moving from opportunity to action.

For the purposes of this standard, business support refers to assistance which is received from individuals or organisations outside of the business, related to a specific business problem or opportunity and/or development of the business. Enterprise support refers to assistance which is received by individuals considering starting their own business. A 'business' can mean an independent entity such as a private sector business, a social enterprise, a charitable or voluntary organisation, or a significant operating unit, with a relative degree of autonomy, within a larger organisation. It can also refer to a formal partnership where two or more businesses are working together towards common goals.

This standard is recommended for individuals and organisations providing assistance to support the development of individuals considering starting their own business and existing businesses, either on a voluntary or commercial basis.

CFABES013
Develop own networks and relationships to provide access to information, support and resources

Performance criteria

You must be able to:

P1 proactively seek opportunities to make new contacts using formal and informal methods

P2 contribute to your networks in a way that builds their confidence in you as a source of trusted and responsible support

P3 ask your networks for information, resources and contact that will benefit your clients

P4 ensure your networks understand your need for information, resources and further contacts

P5 evaluate how new networks and relationships can add value to the service provided to your clients, now and in the future

P6 review the opportunities, costs and benefits with developing new networks and relationships

P7 maintain ways of working with your networks and relationships that follow any guidelines set by your organisation

P8 identify providers of support services in the public, private and third sector that will meet the needs of your clients

P9 establish boundaries of confidentiality between yourself and members of your personal networks and relationships

P10 draw upon the experience and expertise of your networks to add value to the service you provide to your clients

P11 direct clients to use your networks to increase the business opportunities open to them

P12 identify ways to improve the quality of information you obtain from your networks and relationships

P13 keep up to date with developments amongst your networks and relationships and the implications for ways of working with them

P14 monitor the advice and guidance provided by other organisations to identify opportunities to enhance the services you provide

Develop own networks and relationships to provide access to information, support and resources

Knowledge and understanding	**Interpersonal and communication skills**

You need to know and understand:	K1	how to listen and question
	K2	how to exchange information
	K3	why it is important to maintain client confidentiality
	K4	the interests and skills amongst networks and the preferred ways of working with you
	K5	how new ideas may challenge your thinking

Networks and networking

You need to know and understand:	K6	what is the importance of networks and networking in providing support services
	K7	how to build personal contacts and form networks:
	K7.1	formally including joining specialist groups or associations, business networking organisations or by contact with other business support services
	K7.2	informally including at a conference or through on-line discussion forums
	K8	the techniques by which to maintain relationships and networking activity
	K9	ways by which to identify local networking opportunities and any gaps in the context of the needs of your clients
	K10	how to identify people and organisations that have the potential to benefit you and your clients
	K11	the guidelines for providing business and enterprise support services to the client set by your organisation and/or professional body including:
	K11.1	maintaining confidentiality in different working environments
	K11.2	ethics, values and professional standards
	K11.3	equal opportunities, diversity and social inclusion
	K11.4	using information management systems

Evaluate networks and networking

CFABES013
Develop own networks and relationships to provide access to
information, support and resources

You need to know and understand:	K12	how to formally and informally monitor the value of your own networks and relationships
	K13	the ways by which to compare the service provided by you with other support providers
	K14	the methods for evaluating customer satisfaction in relation to your referrals

CFABES013
Develop own networks and relationships to provide access to
information, support and resources

Additional information

Behaviours:

1 develop co-operation by considering the perspective of others

2 build and maintain rapport over sustained periods

3 invite a two-way exchange of information and feedback with the client and others

4 try out new ways of working with others

5 identify people's information needs

6 seek to understand people's needs and motivations

7 comply with, and ensure that others comply with, legal requirements, industry regulations, organisational policies and professional codes

CFABES013
Develop own networks and relationships to provide access to information, support and resources

Developed by	Skills CFA
Version number	2
Date approved	November 2013
Indicative review date	November 2016
Validity	Current
Status	Original
Originating organisation	SFEDI
Original URN	CFABS5
Relevant occupations	Higher education teaching professionals; Further education teaching professionals; Chartered and certified accountants; Management consultants and business analysts; Business and financial project management professionals; Business and related research professionals; Finance and investment analysts and advisers; Vocational and industrial trainers and instructors
Suite	Business and Enterprise Support (2013)
Key words	business; enterprise; support; clients; awareness; engagement; networks; relationships; trust

Overview

This standard is about working with the client to identify and select the services and service providers that they need to achieve their personal and business development goals. It requires you to assist the client in specifying what they want providers to do, share criteria to select appropriate providers of support services and identify sources of funding which may assist the client in paying for services where required.

For the purposes of this standard, business support refers to assistance which is received from individuals or organisations outside of the business, related to a specific business problem or opportunity and/or development of the business. Enterprise support refers to assistance which is received by individuals considering starting their own business. A 'business' can mean an independent entity such as a private sector business, a social enterprise, a charitable or voluntary organisation, or a significant operating unit, with a relative degree of autonomy, within a larger organisation. It can also refer to a formal partnership where two or more businesses are working together towards common goals.

This standard is recommended for individuals and organisations providing assistance to support the development of individuals considering starting their own business and existing businesses, either on a voluntary or commercial basis.

Performance

criteria

You must be able to:

P1 identify a range of service providers who are able to meet the needs and requirements of the client in moving from opportunity to action

P2 advise the client on appropriate methods for selecting and using other providers of business and enterprise support services including any criteria that have to be met if public funding is to be used

P3 work with the client, as and when required, to specify their requirements for business and enterprise support

P4 ensure that the client can develop an appropriate brief for potential suppliers of business and enterprise support services in order that realistic quotes can be obtained

P5 enable the client to develop and use criteria for selecting suppliers that are most likely to provide them with the services that they require and provide best value

P6 provide the client with tools so that they can monitor the progress of a business and enterprise support service in light of agreed targets and milestones

P7 propose ways by which the client can fund the use of business and enterprise support services including potential sources of finance most appropriate to their needs

P8 develop a system which can be used by you to record management information on the support services used by the client

P9 ensure that at all times the responsibility for selecting and using providers of business and enterprise support is retained by the client

Knowledge and understanding	**Business support services**	
You need to know and understand:	K1	the extent and nature of business and enterprise support services appropriate to the needs of the client and how to contact them
	K2	the sources of information available for the client about the extent and nature of business support services
	K3	how different types of business and enterprise support service can provide focused and appropriate expertise and knowledge for the client
	K4	why it is important to be clear about the criteria relating to the accessibility of different types of business support services
	K5	methods for assessing the impartiality and independence of business and enterprise support services

Brokerage

You need to know and understand:	K6	the information that should be included in a brief for suppliers of business and enterprise support services
	K7	ways to develop criteria to select suppliers of business and enterprise support services that will best meet the needs of the client
	K8	what records need to be kept about introductions of the client to other sources of support
	K9	why it is important to ensure that the client retains responsibility for choosing and using suppliers of business and enterprise support services
	K10	the legislation, advisory regulations and organisational guidelines that the support programme should meet

Funding

You need to know and understand:	K11	the range of potential funding opportunities available to the client
	K12	the methods for accessing and applying for funding from different funding agencies

Additional information

Behaviours:

1   seek to understand people's needs and motivations

2   identify people's information needs

3   tailor your approach to align with the client's goals and circumstances

4   respect the client's need for information, commitment and confidentiality

5   gain respect by operating in a credible and professional manner

6   think strategically and take a holistic view of the way forward

7   generate justifiable alternatives to solve a problem or reach an outcome

8   comply with, and ensure that others comply with, legal requirements, industry regulations, organisational policies and professional codes

Developed by	Skills CFA
Version number	2
Date approved	November 2013
Indicative review date	November 2016
Validity	Current
Status	Original
Originating organisation	SFEDI
Original URN	CFABLB3
Relevant occupations	Higher education teaching professionals; Further education teaching professionals; Chartered and certified accountants; Management consultants and business analysts; Business and financial project management professionals; Business and related research professionals; Finance and investment analysts and advisers; Vocational and industrial trainers and instructors
Suite	Business and Enterprise Support (2013)
Key words	business; enterprise; support; clients; awareness; engagement; networks; relationships; trust

Overview

This standard is about helping the client to critically assess a business support offer to ensure that it meets their objectives in relation to developing themselves and their business opportunity. It requires you to translate information from other organisations and networks to the context of the client, introduce planning tools which will help the client to measure success and identify ways of measuring the success of support provided by others.

For the purposes of this standard, business support refers to assistance which is received from individuals or organisations outside of the business, related to a specific business problem or opportunity and/or development of the business. Enterprise support refers to assistance which is received by individuals considering starting their own business. A 'business' can mean an independent entity such as a private sector business, a social enterprise, a charitable or voluntary organisation, or a significant operating unit, with a relative degree of autonomy, within a larger organisation. It can also refer to a formal partnership where two or more businesses are working together towards common goals.

This standard is recommended for individuals and organisations providing assistance to support the development of individuals considering starting their own business and existing businesses, either on a voluntary or commercial basis.

Performance

criteria

You must be able to:

P1   identify a range of information sources to help the client make informed decisions about the business and enterprise support services provided by others

P2   provide a framework to assist the client in comparing the different features and costs of the business and enterprise support services provided by others

P3   summarise the meaning of quality standards in order to help the client reach a decision about the business and enterprise support services provided by others

P4   use appropriate planning tools with the client to identify underlying personal and business skills needs not articulated by the client

P5   seek feedback from the client on the performance of the business and enterprise support services provided by others

P6   encourage the client to take up references in assessing the business and enterprise support services provided by others

P7   act as a translator between the client's needs and the 'language' of business and enterprise support services provided by others

P8   ensure that business and enterprise support providers respond promptly to requests for information from you and/or the client

P9   help to build trust between the client and providers of business and enterprise support services

CFABES015
Help the client to critically assess a business and enterprise support offer

Knowledge and understanding	**Interpersonal and communication skills**

You need to know and understand:

K1   how to use effective interpersonal and communication skills, including, when appropriate:

    K1.1   listening fully and attentively

    K1.2   questioning

    K1.3   checking accuracy

    K1.4   summarising

    K1.5   reflecting back

    K1.6   challenging

    K1.7   respecting and acknowledging issues

    K1.8   negotiation

    K1.9   giving, receiving and passing on constructive feedback

    K1.10   dealing with difficulties

K2   the advantages and disadvantages of different kinds of communication in different circumstances

K3   how new ideas may challenge the client's and your thinking

Analysis and planning

You need to know and understand:

K4   what the client would like to achieve in considering starting their own business and/or developing an existing business

K5   what is involved in achieving the agreed objectives including access to resources, commitment of the other people, development of learning and skills and access to knowledge and information

K6   how to evaluate the potential obstacles to progress towards the agreed objectives by the client

K7   the advantages and disadvantages of the techniques and tools which can be used to assess the benefits and risks associated with a business opportunity

K8   the resources available to meet agreed objectives

K9   how to manage change that may result from achieving the agreed objectives, in terms of personal and/or business development level

K10   the limits of your own skills and knowledge

K11   when and where to introduce the client to other sources of support

Additional information

Behaviours:

1   identify people's information needs

2   seek to understand people's needs and motivations

3   respect the client's need for information, commitment and confidentiality

4   think strategically, taking a holistic view of the way forward

5   seek the right information to analyse a situation and draw sound conclusions

6   generate justifiable alternatives to solve a problem or reach an outcome

7   act within the limits of your authority

CFABES015
Help the client to critically assess a business and enterprise support offer

Developed by	Skills CFA
Version number	2
Date approved	November 2013
Indicative review date	November 2016
Validity	Current
Status	Original
Originating organisation	SFEDI
Original URN	CFABES015
Relevant occupations	Higher education teaching professionals; Further education teaching professionals; Chartered and certified accountants; Management consultants and business analysts; Business and financial project management professionals; Business and related research professionals; Finance and investment analysts and advisers; Vocational and industrial trainers and instructors
Suite	Business and Enterprise Support (2013)
Key words	business; enterprise; support; clients; awareness; engagement; networks; relationships; trust

CFABES016
Help the client to build confidence and capacity to evaluate
and access their own solutions

Overview

This standard is about helping clients to identify and evaluate the business support offer offered by you and/or your organisation. It requires you to develop a delivery plan, identify ways by which to leverage value from other support services and work with the client to ensure that any evaluation adds value to your activities and those of the client.

For the purposes of this standard, business support refers to assistance which is received from individuals or organisations outside of the business, related to a specific business problem or opportunity and/or development of the business. Enterprise support refers to assistance which is received by individuals considering starting their own business. A 'business' can mean an independent entity such as a private sector business, a social enterprise, a charitable or voluntary organisation, or a significant operating unit, with a relative degree of autonomy, within a larger organisation. It can also refer to a formal partnership where two or more businesses are working together towards common goals.

This standard is recommended for individuals and organisations providing assistance to support the development of individuals considering starting their own business and existing businesses, either on a voluntary or commercial basis.

CFABES016
Help the client to build confidence and capacity to evaluate
and access their own solutions

Performance

criteria

You must be able to:

P1   use appropriate planning tools in drawing up a programme of action with the client

P2   incorporate within the programme of action a risk analysis which includes actions to minimise any identified risks

P3   ensure that the client understands the steps taken to develop and embed a programme of action

P4   review progress against the programme of action ensuring that all milestones are met

P5   identify opportunities where investments by the client can leverage access to other business and enterprise support services

P6   identify criteria by which to evaluate the impact and value added of the business and enterprise support services provided by you and/or your organisation

P7   devise a framework for the client to allow them to review the impact of the business and enterprise support services provided by you on personal and/or business development

P8   link the evaluation framework into the journey for the client in moving from opportunity to action and the implications for learning and skills development

P9   develop the awareness of the client of the skills required to critically evaluate proposals from providers of business and enterprise support services

CFABES016
Help the client to build confidence and capacity to evaluate and access their own solutions

Knowledge and understanding	**Business and enterprise support services**

You need to know and understand:

K1   the extent and nature of business and enterprise support services appropriate to the needs of the client and how to contact them

K2   the sources of information available for the client about the extent and nature of business support services

K3   how different types of business and enterprise support service can provide focused and appropriate expertise and knowledge for the client

K4   why it is important to be clear about the criteria relating to the accessibility of different types of business and enterprise support services

K5   methods for assessing the impartiality and independence of business and enterprise support services

Brokerage

You need to know and understand:

K6   the information that should be included in a brief for suppliers of business and enterprise support services

K7   ways to develop criteria to select suppliers of business and enterprise support services that will best meet the needs of the client

K8   what records need to be kept about introductions of the client to other sources of support

K9   why it is important to ensure that the client retains responsibility for choosing and using suppliers of business and enterprise support services

K10   the legislation, advisory regulations and organisational guidelines that the support programme should meet

Funding

You need to know and understand:

K11   the range of potential funding opportunities available to the client

K12   the methods for accessing and applying for funding from different funding agencies

CFABES016
Help the client to build confidence and capacity to evaluate
and access their own solutions

Additional information

Behaviours:

1   seek to understand people's needs and motivations

2   identify people's information needs

3   tailor your approach to align with the client's goals and circumstances

4   respect the client's need for information, commitment and confidentiality

5   gain respect by operating in a credible and professional manner

6   think strategically and take a holistic view of the way forward

7   generate justifiable alternatives to solve a problem or reach an outcome

8   comply with, and ensure that others comply with, legal requirements, industry regulations, organisational policies and professional codes

CFABES016
Help the client to build confidence and capacity to evaluate and access their own solutions

Developed by	Skills CFA
Version number	2
Date approved	November 2013
Indicative review date	November 2016
Validity	Current
Status	Original
Originating organisation	SFEDI
Original URN	CFABES016
Relevant occupations	Higher education teaching professionals; Further education teaching professionals; Chartered and certified accountants; Management consultants and business analysts; Business and financial project management professionals; Business and related research professionals; Finance and investment analysts and advisers; Vocational and industrial trainers and instructors
Suite	Business and Enterprise Support (2013)
Key words	business; enterprise; support; clients; awareness; engagement; networks; relationships; trust

Overview

This standard is about reflecting on, and evaluating, your own practice to ensure that you are providing support which adds value to the personal and/or business development of the client. It requires you to monitor your own practices on an ongoing basis, seek feedback from others and identify responses to any identified areas for development you could make.

For the purposes of this standard, business support refers to assistance which is received from individuals or organisations outside of the business, related to a specific business problem or opportunity and/or development of the business. Enterprise support refers to assistance which is received by individuals considering starting their own business. A 'business' can mean an independent entity such as a private sector business, a social enterprise, a charitable or voluntary organisation, or a significant operating unit, with a relative degree of autonomy, within a larger organisation. It can also refer to a formal partnership where two or more businesses are working together towards common goals.

This standard is recommended for individuals and organisations providing assistance to support the development of individuals considering starting their own business and existing businesses, either on a voluntary or commercial basis.

Performance

criteria

You must be able to:

P1   review with the client the delivery of the support services provided by you against the agreed programme of action

P2   analyse the way in which you work with the client including:

P2.1   your approach to providing business and enterprise support services

P2.2   any problems that need to be resolved

P2.3   causes of any changes against agreed objectives or milestones and the implications of these changes

P2.4   the impact and value added of your work on the client, at a personal and/or business level

P2.5   improvements that need to be made, either by yourself or through working with others

P3   develop your practices to take account of any changes in:

P3.1   your relationship with the client

P3.2   changes at a personal and/or business level for the client

P3.3   the journey from opportunity to action

P4   monitor your practices regularly to ensure that:

P4.1   it is underpinned by an approach that is professional and ethical

P4.2   it meets standards set by appropriate professional bodies

P4.3   it meets appropriate regulations and/or organisational guidelines

P5   gain feedback on your performance from others who are in a position to review the support services provided to the client

P6   identify improvements you could make to your practices with current and future clients

Knowledge and understanding	**Monitor your own performance**

You need to know and understand:	K1	why it is important to evaluate your own performance in providing business and enterprise support services
	K2	how to apply informal and formal ways of monitoring the progress and quality of your own practices against standards set by you, your organisation or a professional body
	K3	the methods for establishing and applying formative and summative measures for evaluating your own performance
	K4	the limitations of self-evaluation
	K5	where and how to obtain constructive feedback on your performance from others
	K6	how the type of client and their personal and business needs can affect your performance

Equality and diversity

You need to know and understand:	K7	the benefits of seeing clients as individuals with different skills, abilities and needs

Organisational influences

You need to know and understand:	K8	the performance goals set by your organisation or professional body
	K9	the guidelines for evaluating services set by your organisation or professional body including:
	K9.1	the conditions and measures of economy, efficiency, effectiveness, value for money and quality
	K9.2	the effect of financial and time limits on services
	K9.3	any local or regional priorities and problems

Additional information

Behaviours:

1 strive to add value by achieving results in the best way

2 be committed to developing yourself to improve performance

3 prioritise and schedule to ensure optimum use of time and resource

4 work to turn unexpected events into opportunities rather than threats

5 try out new ways of working

6 comply with, and ensure that others comply with, legal requirements, industry regulations, organisational policies and professional codes

7 act within the limits of your authority

8 show integrity, fairness and consistency in decision making

CFABES017
Evaluate the quality of your own practice in business and enterprise support

Developed by	Skills CFA
Version number	2
Date approved	November 2013
Indicative review date	November 2016
Validity	Current
Status	Original
Originating organisation	SFEDI
Original URN	CFABS6
Relevant occupations	Higher education teaching professionals; Further education teaching professionals; Chartered and certified accountants; Management consultants and business analysts; Business and financial project management professionals; Business and related research professionals; Finance and investment analysts and advisers; Vocational and industrial trainers and instructors
Suite	Business and Enterprise Support (2013)
Key words	business; enterprise; support; clients; awareness; engagement; networks; relationships; trust

CFABES018
Develop your own ability to provide a business and
enterprise support service

Overview   This standard is about developing your abilities and skills in supporting individuals
and businesses in moving from opportunity to action. It requires you to continuously
develop your knowledge and skills in providing business support services, reflect on
supporting others in terms of personal, business and/or career development and,
where appropriate, review the fit of your needs and requirements with the priorities of
the organisation for which you work.

For the purposes of this standard, business support refers to assistance which is
received from individuals or organisations outside of the business, related to a
specific business problem or opportunity and/or development of the business.
Enterprise support refers to assistance which is received by individuals considering
starting their own business. A 'business' can mean an independent entity such as a
private sector business, a social enterprise, a charitable or voluntary organisation, or
a significant operating unit, with a relative degree of autonomy, within a larger
organisation. It can also refer to a formal partnership where two or more businesses
are working together towards common goals.

This standard is recommended for individuals and organisations providing assistance
to support the development of individuals considering starting their own business and
existing businesses, either on a voluntary or commercial basis.

CFABES018
Develop your own ability to provide a business and
enterprise support service

Performance
criteria

You must be able to:

P1 evaluate the requirements of your role in providing business and enterprise support services to others, where appropriate, taking account of the expectations and objectives of your organisation

P2 maintain a level of knowledge and understanding that meets or exceeds the client's expectations including:

    P2.1 routes into business for individuals considering starting their own business and the life world of the small business owner-manager

    P2.2 the extent and nature of business and enterprise support services available to meet the client needs

    P2.3 trends, opportunities and developments in business development processes and practices that may affect individuals considering starting their own business and existing small business

    P2.4 developments in the business support landscape that may affect the support provided by you and/or your organisation

    P2.5 use of information and communications technology

P3 extend your knowledge and expertise in response to appropriate changes in business processes and practices and the business and enterprise support landscape

P4 obtain the best available information to assist you in providing business and enterprise support services, given the time and resources available to you

P5 use feedback from clients, colleagues and other stakeholders about your performance to identify any gaps between the current and future requirements of your professional role and your current skills, knowledge and understanding

P6 adopt a reflective approach to evaluating your own motivations to providing business and enterprise support to others

P7 adopt a reflective approach to evaluating your practice in providing business and enterprise support services including an assessment of own objectives and recognised professional standards

P8 plan your own learning and skills development to address any gaps in current skills, knowledge and understanding

P9 update your personal development plan to include new aims or achievements

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Develop your own ability to provide a business and
enterprise support service

Knowledge and understanding	**Ethical and professional considerations**

You need to know and understand:

K1   any guidelines provided by your organisation and/or professional body for providing business and enterprise support services including:

     K1.1   ethics, values and standards of good practice

     K1.2   client service and confidentiality

Plan your own development

You need to know and understand:

K2   the principles that underpin professional development

K3   why it is important to invest in continuing professional development

K4   why it is important to review the current requirements of your role and the ways in which these requirements may evolve in the future

K5   how to identify development needs to address any identified gaps between the requirements of your practice and your current knowledge, understanding and skills

K6   the ways by which to enhance your understanding and knowledge of the life world of the small business owner-manager and business development processes and practices

K7   the style of learning that best suits you

K8   why it is important to reflect on your motivations to providing business and enterprise support services to others

K9   your own strengths and weaknesses in providing business and enterprise support services

K10   your values and personal and career goals and how to relate them to your role in providing business and enterprise support services

K11   the key elements and scope of a development plan

K12   how to set objectives which are SMART (Specific, Measurable, Achievable, Realistic and Time-bound) and plan associated actions

K13   how to update work objectives and development plans in the light of your performance in providing business and enterprise support services and feedback from others

K14   the way your organisation and/or a professional body works including

CFABES018
Develop your own ability to provide a business and
enterprise support service

resources, objectives, targets and training and development budget

K15   the objectives of your organisation and/or a professional body for personal
development

Improve your performance

K16   the standards of performance set by you, your organisation and/or professional
body

K17   how to evaluate your performance against the requirements of your role in
providing business and enterprise support services

K18   how to use sources of feedback on your performance to add value to the
business and enterprise support services provided

K19   how to monitor the quality of your work and your progress against requirements
and plans

K20   the ways to develop your knowledge about and experience of providing
business and enterprise support services

K21   how to increase your confidence when working with individuals and businesses
from different backgrounds and situations

K22   the advantages and disadvantages of different types of development activities
you could use

K23   how and why development activities have contributed to your performance in
providing business and enterprise support services

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Develop your own ability to provide a business and
enterprise support service

Additional information

Behaviours:

1   invite a two-way exchange of information and feedback with others

2   develop yourself to improve performance

3   work to turn unexpected events into opportunities rather than threats

4   try out new ways of working

5   comply with, and ensure that others comply with, legal requirements, industry regulations, organisational policies and professional codes

CFABES018
Develop your own ability to provide a business and enterprise support service

Developed by	Skills CFA
Version number	2
Date approved	November 2013
Indicative review date	November 2016
Validity	Current
Status	Original
Originating organisation	SFEDI
Original URN	CFABS7
Relevant occupations	Higher education teaching professionals; Further education teaching professionals; Chartered and certified accountants; Management consultants and business analysts; Business and financial project management professionals; Business and related research professionals; Finance and investment analysts and advisers; Vocational and industrial trainers and instructors
Suite	Business and Enterprise Support (2013)
Key words	business; enterprise; support; clients; awareness; engagement; networks; relationships; trust

| Overview | This standard is about supporting the client with the development of personal enterprising skills, as part of their journey from identifying a business opportunity to action. It requires you to explore with the client how being enterprising will assist them with personal and/or business development plans, introduce tools and frameworks the client can use to identify strengths and weaknesses and identify other sources of support which can be accessed to progress personal and/or business development plans. |

For the purposes of this standard, business support refers to assistance which is received from individuals or organisations outside of the business, related to a specific business problem or opportunity and/or development of the business. Enterprise support refers to assistance which is received by individuals considering starting their own business. A 'business' can mean an independent entity such as a private sector business, a social enterprise, a charitable or voluntary organisation, or a significant operating unit, with a relative degree of autonomy, within a larger organisation. It can also refer to a formal partnership where two or more businesses are working together towards common goals.

This standard is recommended for individuals and organisations providing assistance to support the development of individuals considering starting their own business and existing businesses, either on a voluntary or commercial basis.

Support the client through developing personal enterprising skills

Performance criteria

You must be able to:

P1   encourage a client to reflect on how being enterprising will support their development in the near to mid-term

P2   review the strengths and weaknesses in the enterprising attributes, behaviours and skills of the client

P3   assess the motivation of the client in considering starting their own business

P4   question the client as to the development of the business opportunity

P5   provide a framework to the client which enables them to unpack the key building blocks of the business model in moving from opportunity to action

P6   identify the resources possessed by the client which will assist them in moving from opportunity to action

P7   assess the personal and business resources required by the client to move from opportunity to action

P8   ensure the client has considered how any additional resources required may be acquired

P9   work with the client to identify key areas of development in terms of motivations and drivers, the business opportunity, the resources and abilities and knowledge

P10   provide the client with a framework to assess key challenges, actions and milestones in moving from opportunity to action

P11   introduce the client to other individuals and organisations who will support the development of their enterprising skills

P12   advise the client of the ways in which moving from opportunity to action risk their social, financial and/or human capital

P13   advise the client on how to use creativity and innovation in moving from opportunity to action

CFABES019
Support the client through developing personal enterprising skills

Knowledge and understanding	**Enterprising attributes, behaviours and skills**

You need to know and understand:	K1	the attributes, behaviours and skills associated with being enterprising
	K2	the importance of enterprising attributes, behaviours and skills in engaging with the labour market, whether in terms of being employed by someone, starting your business or in studying
	K3	how to assess the enterprising attributes, behaviours and skills possessed by the client
	K4	how to introduce the client to others who can work through any issues which emerge from an assessment of the enterprising attributes, behaviours and skills possessed by the client
	K5	the role for creativity and innovation in moving from opportunity to action

Assess business opportunities and ideas

You need to know and understand:	K6	the difference between an opportunity and business idea
	K7	the ways in which opportunities are spotted by individuals and businesses
	K8	sources of business ideas
	K9	how to provide a client with feedback on the benefits and drawbacks of a business idea
	K10	the business model required to assist the client in moving from opportunity to action
	K11	how to support the client in reflecting on the feasibility of the business idea
	K12	the implications of moving from opportunity to action on social, human and financial capital of the client

Assess personal and business resources

You need to know and understand:	K13	the advantages and disadvantages of different frameworks which can be used to assess personal and business resources
	K14	what barriers and challenges the client may face in acquiring the required personal and/or business resources
	K15	the implications in not acquiring the required resources to the journey of the

client in moving from opportunity action

K16 the value of informal and formal networks of the client in acquiring the resources needed to move from opportunity to action

K17 the development of personal and business resources required by the client

K18 how to introduce other individuals and organisations which can assist the client in acquiring the personal and business resources needed in moving from opportunity to action

Assess abilities

You need to know
and understand:

K19 why it is important to identify the difference between technical and business management abilities

K20 encourage the client to identify the extent and nature of their own technical and business management abilities

K21 how to introduce the client to others who can address any identified gaps in technical and business management abilities

Additional information

Behaviours:

1. recognise the opportunities presented by the diversity of people
2. work to turn unexpected events into opportunities rather than threats
3. try out new ways of working
4. identify people's information needs
5. seek to understand people's needs and motivations
6. show integrity, fairness and consistency in decision making

CFABES019
Support the client through developing personal enterprising skills

Developed by	Skills CFA
Version number	1
Date approved	November 2013
Indicative review date	November 2016
Validity	Current
Status	Original
Originating organisation	SFEDI
Original URN	CFABES019
Relevant occupations	Higher education teaching professionals; Further education teaching professionals; Chartered and certified accountants; Management consultants and business analysts; Business and financial project management professionals; Business and related research professionals; Finance and investment analysts and advisers; Vocational and industrial trainers and instructors
Suite	Business and Enterprise Support (2013)
Key words	business; enterprise; support; clients; awareness; engagement; networks; relationships; trust

CFABES020
Support the client through enterprise mentoring

Overview

This standard is about assisting the clients in moving from opportunity to action, through mentoring, whether it is an individual considering starting their own business or the owner-manager of an existing business looking to develop and grow. It requires you to establish a good relationship with the client, explore the needs and priorities of the client, provide encouragement for action and change and introduce others who may be able to help the client move from opportunity to action.

For the purposes of this standard, business support refers to assistance which is received from individuals or organisations outside of the business, related to a specific business problem or opportunity and/or development of the business. Enterprise support refers to assistance which is received by individuals considering starting their own business. A 'business' can mean an independent entity such as a private sector business, a social enterprise, a charitable or voluntary organisation, or a significant operating unit, with a relative degree of autonomy, within a larger organisation. It can also refer to a formal partnership where two or more businesses are working together towards common goals.

This standard is recommended for individuals and organisations providing assistance to support the development of individuals considering starting their own business and existing businesses, either on a voluntary or commercial basis.

Performance

criteria

You must be able to:

P1   ensure the client understands your role as a mentor and how it differs to other business support roles

P2   agree with the client the goals and rules of the mentoring process and how long the relationship may last

P3   help the client to express ideas and any concerns about their personal and/or business situation, plans and needs, without judging them, and provide appropriate feedback

P4   encourage the client to explain clearly what they want to achieve through comparing their needs and abilities with current personal and business practices

P5   recommend a programme of action which best meets the needs of the client

P6   agree with the client how and when to review progress against the programme of action

P7   encourage the client to take responsibility for setting their goals and to make their own decisions and actions

P8   encourage the client to develop the confidence, understanding and skills needed to meet their personal and business objectives

P9   present new information to the client in a way that they are able to understand and that is relevant to their needs

P10   recognise when you are giving business advice and no longer mentoring and act appropriately

P11   help the client to reflect on and learn from things that did not turn out as expected

P12   refer the client to relevant sources of information, advice and guidance, when it is required

P13   encourage the client to consider ways in which to review the support provided by others

P14   encourage the client to consider different perspectives when considering to use information, advice and guidance to improve their own learning and skills

P15   present a positive image of business and enterprise mentoring

P16   follow the code of ethics for mentoring that is set by you, your organisation

and/or a professional body

P17   keep up-to-date and accurate records of contact with the client

Knowledge and understanding	**Principles of mentoring**

You need to know and understand:	K1	what your role is as a business and enterprise mentor
	K2	the ways in which mentoring is similar and different to other business support roles including business advice, coaching and consultancy
	K3	the code of ethics for mentoring that is set by your organisation and/or a professional body including the ways to work within the requirements and policies of the mentoring scheme in which you are involved
	K4	what are the rules on confidentiality and data protection and how to follow them
	K5	the different reasons the client might have for starting or running a business and how these will affect their goals
	K6	what rules to set for the mentoring process including how often to meet, the places and times to meet, what to do if someone cannot make a session and when to involve other work colleagues
	K7	how to identify and agree a contract for mentoring
	K8	the resources and facilities which may be needed for the mentoring process

Manage the relationship with the client

You need to know and understand:	K9	how your behaviour is different when you are mentoring in comparison to advising, coaching and consulting
	K10	how to recognise when you are not mentoring in a mentoring relationship with the client
	K11	the implications for the client when you are not mentoring in a mentoring relationship
	K12	the advantages and disadvantages of different communication methods
	K13	how different types of people learn and make sense of events
	K14	how to:
		K14.1 create an environment in which the client will feel at ease
		K14.2 make the mentoring experience effective for different types of client
		K14.3 identify when the relationship has reached a natural end and conclude it in a way which is viewed by the client as positive
		K14.4 develop the clients' enthusiasm, commitment and trust

K14.5   actively listen to identify the clients' real situations, problems or needs

K14.6   question with the client that they have understood your input

K14.7   share information, ideas and arguments patiently and tactfully

K14.8   inspire confidence, persistence and realism

K14.9   build long-term relationships

K14.10   give and receive feedback

K14.11   deal with any difficulties and conflicts as far as possible

K14.12   manage your time and activities

K14.13   show respect for and sensitivity to the needs and feelings of the client and other stakeholders

K14.14   avoid bias, preconceptions and judging of the client and other stakeholders

K14.15   recognise the effect of your own actions and behaviour on the client and other stakeholders

K14.16   present yourself positively to the client and other stakeholders

K14.17   stay calm in difficult or uncertain situations

K14.18   handle the client's and/other stakeholder's emotions without becoming personally involved in them

Support client development

You need to know and understand:

K15   what are the clients' personal goals including specific personal and/or business problems and targets

K16   what further sources of support may be relevant to the client's needs

K17   the advantages and disadvantages of different learning styles exhibited by the client

K18   how to:

K18.1   help the client to identify practical and affordable solutions

K18.2   develop the clients' self-confidence

K18.3   encourage the client to review and develop skills that will improve personal and/or business development

K18.4   encourage the client to develop personal skills so they can develop the business opportunity by themselves

K18.5   allow the client to express themselves and take action to meet their

goals

K18.6   help the client to accept and manage change

Additional information

Behaviours:

1 respect the client's need for information, commitment and confidentiality

2 listen and respond effectively and check understanding

3 act in a way that shows you are willing to help the client

4 adapt your personal style to empathise with different types of client

5 build and maintain rapport over sustained periods

6 identify people's information needs

7 seek to understand people's needs and motivations

8 invite a two-way exchange of information and feedback with the client and others

9 comply with, and ensure that others comply with, legal requirements, industry regulations, organisational policies and professional codes

CFABES020
Support the client through enterprise mentoring

Developed by	Skills CFA
Version number	2
Date approved	November 2013
Indicative review date	November 2016
Validity	Current
Status	Original
Originating organisation	SFEDI
Original URN	CFABES020
Relevant occupations	Higher education teaching professionals; Further education teaching professionals; Chartered and certified accountants; Management consultants and business analysts; Business and financial project management professionals; Business and related research professionals; Finance and investment analysts and advisers; Vocational and industrial trainers and instructors
Suite	Business and Enterprise Support (2013)
Key words	business; enterprise; support; clients; awareness; engagement; networks; relationships; trust

CFABES021
Support the client through enterprise training

Overview

This standard is about delivering practical and developmental enterprise training that meets the needs of the client. It complements other national occupational standards related to training by outlining the skills and knowledge that are needed to be effective when training individuals considering starting their own business and/or existing business owner-managers. It requires you to create an environment in which people can develop and learn, deliver content which meets the needs of the client and introduce the client to other sources of support to add value to the training experience.

For the purposes of this standard, business support refers to assistance which is received from individuals or organisations outside of the business, related to a specific business problem or opportunity and/or development of the business. Enterprise support refers to assistance which is received by individuals considering starting their own business. A 'business' can mean an independent entity such as a private sector business, a social enterprise, a charitable or voluntary organisation, or a significant operating unit, with a relative degree of autonomy, within a larger organisation. It can also refer to a formal partnership where two or more businesses are working together towards common goals.

This standard is recommended for individuals and organisations providing assistance to support the development of individuals considering starting their own business and existing businesses, either on a voluntary or commercial basis.

Performance
criteria

You must be able to:

P1   communicate your experience of working with individuals considering starting their own business and/or owner-managers of small businesses

P2   show an understanding of the situation of people who you are working with, including the business opportunities, their business model, the market, the people and the internal and external influences

P3   deliver training that is up to date, relevant and adds value at a practical level, to the people who you are working with

P4   use examples about your own, and other appropriate, experiences with which the people who you are working with can identify

P5   empathise with the problems and opportunities encountered by the people who you are working with

P6   build solutions into the training experience to assist in addressing identified problems and opportunities

P7   adapt the structure, content and approaches to delivery during the training experience

P8   deliver training in a way that motivates the people who you are working with, to move from opportunity to action

P9   deal with situations with the people which you are working with, where you do not have the appropriate information to respond to questions

P10   encourage and challenge at key stages during the training experience

P11   create a positive training experience which is welcoming, participative, non-judgemental and 'can-do' focused

P12   reflect on when you move into a coaching or mentoring role and adapt your delivery appropriately

P13   refer and, where appropriate, introduce the people who you are working with to other individuals or organisations whose services may be helpful to them

Knowledge and understanding	**Empathy with enterprise**
You need to know and understand:	K1 the journey into working for yourself
	K2 the day to day pressures and responsibilities associated with running your own business
	K3 the interplay of family and business relationships that small business owner-managers and entrepreneurs may have to deal with
	K4 the different ways that entrepreneurs may think and behave from those in employment

The life world of the small business

You need to know and understand:	K5 the enterprising skills and knowledge that allow someone to start up, survive and thrive
	K6 the different stages involved in starting a business
	K7 the different functions involved in running a business including the key inter-relationships and the ways in which they affect each other
	K8 how your experience can apply to different types of business and sector
	K9 the current issues and practices related to the topics that you deliver training on

Deliver training to prospective and existing small business owner-managers and entrepreneurs

You need to know and understand:	K10 the range of issues that enterprise training may need to address including the balance between work and home life, the preconceptions and attitudes of the people who you are working with and business issues
	K11 how to tailor training to suit the needs of individual people
	P14 the strategies which can be used to deal with situations with the people which you are working with, where you do not have the appropriate information to respond to questions
	K12 the benefits of delivering interactive and practical training including using examples, case studies and exercises based around the real needs and

problems of individuals considering starting their own business and/or running a small business

K13   the value to personal self-esteem and business resilience that can be gained from hearing that other people have experienced the same difficulties and the ways in which they were addressed

K14   the value in using behaviour associated with coaching and mentoring to support training

K15   the abilities and skills required to move from training to mentoring and coaching to add value to the training experience

K16   how to communicate passion and enthusiasm in order to motivate and commit the people who you are working with to action

K17   the type of language and terminology that is appropriate for individuals wishing to start their own business and/or owners-managers of small businesses

K18   other professionals who deliver complementary services to yours who have a strong business and enterprise perspective

Improve your performance

You need to know and understand:

K19   the boundaries of your expertise and knowledge so that you know when to refer the people you are working with to others

K20   how to collect and evaluate feedback to improve the training you deliver

Additional information

Behaviours:

1. appreciate how a business operates in different sectors
2. develop co-operation by considering the perspective of others
3. think strategically, takes a holistic view of the way forward
4. identify people's information needs
5. seek the right information to analyse a situation and draw sound conclusions
6. seek to understand people's needs and motivations
7. generate justifiable alternatives to solve a problem or reach an outcome
8. strive to add value by achieving results in the best way
9. develop self to improve performance
10. work to turn unexpected events into opportunities rather than threats
11. try out new ways of working

Developed by	Skills CFA
Version number	2
Date approved	November 2013
Indicative review date	November 2016
Validity	Current
Status	Original
Originating organisation	SFEDI
Original URN	CFABES021
Relevant occupations	Higher education teaching professionals; Further education teaching professionals; Chartered and certified accountants; Management consultants and business analysts; Business and financial project management professionals; Business and related research professionals; Finance and investment analysts and advisers; Vocational and industrial trainers and instructors
Suite	Business and Enterprise Support (2013)
Key words	business; enterprise; support; clients; awareness; engagement; networks; relationships; trust

Overview

This standard is about delivering a demand-led and professional consultancy service that meets the needs of the client. It complements other national occupational standards related to consulting by outlining the skills and knowledge that are needed to be effective when working with individuals considering starting their own business or existing business owner-managers. It requires you to develop a relationship with the client, manage expectations around the nature of the relationship and service to be provided, deliver a service which meets the needs of the client and introduce the client to other sources of support to add value to the experience of working with you.

For the purposes of this standard, business support refers to assistance which is received from individuals or organisations outside of the business, related to a specific business problem or opportunity and/or development of the business. Enterprise support refers to assistance which is received by individuals considering starting their own business. A 'business' can mean an independent entity such as a private sector business, a social enterprise, a charitable or voluntary organisation, or a significant operating unit, with a relative degree of autonomy, within a larger organisation. It can also refer to a formal partnership where two or more businesses are working together towards common goals.

This standard is recommended for individuals and organisations providing assistance to support the development of individuals considering starting their own business and existing businesses, either on a voluntary or commercial basis.

Performance

criteria

You must be able to:

P1   demonstrate your enthusiasm and passion for business and enterprise learning and skills development

P2   communicate your experience of working with individuals considering starting their own business and/or owner-managers of small businesses

P3   take time to understand what the client wants from their relationship with you

P4   show an understanding of the situation of the client, including the business opportunities, their business model, the market, the people and the internal and external influences

P5   explain the process involved in working with you including expectations, specific stages and any costs involved in work that would be undertaken

P6   deliver a consultancy service that is up to date, relevant and adds value to the client at a practical level

P7   deliver a consultancy service in a way that motivates the client to move from opportunity to action

P8   make sure the client maintains control of decisions about professional services they purchase from you

P9   suggest to the client how they may enhance the effectiveness of the way they do things and the associated benefits and costs

P10 suggest practical options that are viable and add value to the client at a personal and/or business level

P11 refer the client to other business support providers to address specific areas of action

Knowledge and understanding	**Empathy with enterprise**

You need to know and understand:	K1	the day to day pressures and responsibilities associated with running your own business
	K2	the interplay of family and business relationships that small business owner-managers and entrepreneurs may have to deal with
	K3	the different ways that entrepreneurs may think and behave from those in employment

The life world of the small business

You need to know and understand:	K4	the enterprising skills and knowledge that allow someone to start up, survive and thrive
	K5	the different stages involved in starting a business
	K6	the different functions involved in running a business including the key inter-relationships and the ways in which they affect each other
	K7	how your experience can apply to different types of businesses and sectors
	K8	the current issues and practices related to the topics that you deliver consultancy on
	K9	the legal issues that small business must comply with that are relevant to your area of work

Deliver a consultancy service to a small business

You need to know and understand:	K10	the type of language and terminology that is appropriate for small businesses
	K11	how to adapt your service to suit the needs of the client
	K12	the ways in which the core service you offer can be expanded to deal with other issues that may be useful to the client
	K13	frameworks and tools which can be used to identify the improvements in the way the client manages activities after using a consultancy service
	K14	the benefits of taking a longer term view of the business and what it will need in the future
	K15	why it is important to build the capability of the client and how this may lead to

more business in the long term

K16 how to develop a pricing structure that will attract small businesses

K17 other professionals and business support providers who deliver complementary services to yours who have a strong business and enterprise perspective

Develop the relationship with the client

You need to know
and understand:

K18 why it is important to get to know the client as an individual and build a relationship with them

K19 how to develop the client's trust in you

K20 the strength of personal recommendation as a source of new business

K21 the tendency of small business owner-managers and entrepreneurs to compare thoughts about costs and quality of service with each other

K22 the importance of being proactive and thinking of innovative solutions when dealing with the client

K23 how to translate technical terms and concepts in to language that the client can understand

Improve your performance

You need to know
and understand:

K24 the boundaries of your expertise and knowledge so that you know when to refer the people you are working with to others

K25 how to collect and evaluate feedback to improve the consultancy you deliver

Additional information

Behaviours:

1 appreciate how a business operates in different client sectors

2 develop co-operation by considering the perspective of others

3 think strategically, takes a holistic view of the way forward

4 identify people's information needs

5 seek the right information to analyse a situation and draw sound conclusions

6 seek to understand people's needs and motivations

7 generate justifiable alternatives to solve a problem or reach an outcome

8 strive to add value by achieving results in the best way

9 develop self to improve performance

10 work to turn unexpected events into opportunities rather than threats

11 try out new ways of working

CFABES022
Support the client through a professional consultancy service

Developed by	Skills CFA
Version number	1
Date approved	November 2013
Indicative review date	November 2016
Validity	Current
Status	Original
Originating organisation	SFEDI
Original URN	CFABES022
Relevant occupations	Higher education teaching professionals; Further education teaching professionals; Chartered and certified accountants; Management consultants and business analysts; Business and financial project management professionals; Business and related research professionals; Finance and investment analysts and advisers; Vocational and industrial trainers and instructors
Suite	Business and Enterprise Support (2013)
Key words	business; enterprise; support; clients; awareness; engagement; networks; relationships; trust