

Business Link Broker

National Occupational Standards

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Skills CFA
6 Graphite Square, Vauxhall Walk,
London SE11 5EE
T: 0207 0919620
F: 0207 0917340
Info@skillscfa.org www.skillscfa.org

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CFABLB1

Deliver business support under the Business Link brand



Overview

This is about delivering a business support service that meets the requirements of the Business Link brand. This involves operating in a way that meets accepted Business Link practice and managing client expectations on confidentiality while delivering business support that is appropriate to each client.

CFABLB1

Deliver business support under the Business Link brand

Performance criteria

You must be able to:

- P1 use communication methods and consulting styles that are appropriate to each client and that meet accepted business link practice
- P2 use your knowledge and understanding of how small businesses work in practice to deliver a business support service to clients that meets the requirements of the business link brand
- P3 make best use of business link resources when meeting and communicating with clients
- P4 manage client confidentiality in accordance with the requirements of the business link brand and your organisation
- P5 explain the limitations on client confidentiality to the client and obtain consent
- P6 explain to clients who do not consent to the business link confidentiality procedures the limitations of the service that you will be able to offer
- P7 explain the situation clearly to clients who are not eligible for the Business Link service they have requested and recommend suitable constructive alternatives

CFABLB1

Deliver business support under the Business Link brand

Knowledge and understanding

You need to know and understand:

Business Link service

- K1 what the business link service includes and who is eligible for it
- K2 what alternatives are available for those not eligible
- K3 what resources are available as part of the business link service
- K4 the protocols for communication that should be followed and how to agree them with the client
- K5 how to choose and use a range of client-led consulting styles including acceptant, catalytic, confrontational and perspective

Business support

- K6 the major functions that are required in a small business, how they link to and support each other and the challenge for small businesses in successfully managing them
- K7 how to judge the strengths and weaknesses of different types of small businesses, by looking at the market sectors those businesses are in, the businesses' potential for growth, their stage of growth and their management abilities towards people, finance and physical resources
- K8 how to help small businesses identify and build on the unique selling points of their business
- K9 the main issues that affect business start-ups and growing businesses and what will help some small businesses succeed when others fail
- K10 how to evaluate business problems and opportunities and how to enable clients to make sense of the business analysis process and the results
- K11 how outside factors are affecting small businesses, including UK and European regulations, Government projects, economic trends, industrial trends and developments, geographical features and political and social issues
- K12 the different personal or business support people starting up and developing small businesses require

CFABLB1

Deliver business support under the Business Link brand

Additional Information

Behaviours

You need to show the following behaviours:

1. appreciate how an organisation operates in different client sectors
2. tailor your approach to align with the client's goals and circumstances
3. respect the client's need for information, commitment and confidentiality
4. gain respect by operating in a credible and professional manner
5. confident about your own knowledge and ability

CFABLB1

Deliver business support under the Business Link brand

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CFABLB2

Broker Business Link clients to business support services



Overview

This is about helping clients impartially to choose and use the services and service providers that they need to achieve their business goals. This requires that you help them specify what they want providers to do, develop criteria to select them and access funding to pay for it.

CFABLB2

Broker Business Link clients to business support services

Performance criteria

- You must be able to:*
- P1 identify a range of service providers who are able to meet the client's requirements for business support services
 - P2 advise clients on appropriate methods for choosing and using suppliers, including any criteria that have to be met if public funding is to be used
 - P3 provide assistance to clients, as and when required, to specify their requirements for business support
 - P4 enable clients to provide an effective brief to potential suppliers in order that comprehensive and realistic quotes can be obtained
 - P5 enable clients to develop and use criteria for selecting suppliers that are most likely to provide them with the service that they require and provide best value
 - P6 monitor the support programme to make sure that it meets the legislation, advisory regulations and organisational guidelines that apply to business support
 - P7 help clients to fund their requirements for business support using the sources of finance most appropriate to their needs
 - P8 record management information on the chosen brokerage solution appropriately on the customer relationship management system
 - P9 ensure that at all times the responsibility for choosing and using suppliers is retained by the client

CFABLB2

Broker Business Link clients to business support services

Knowledge and understanding

You need to know and understand:

Business support services

- K1 the range of relevant internal and external business support services and how to contact them
- K2 ways that the different support services can provide focussed and relevant support and expertise
- K3 the sources of information available for clients about suppliers offering business support services
- K4 how to use the supplier database used in your organisation and ways to bring new suppliers to it
- K5 the business support services that you can help the client to access through the Business Link brand
- K6 the procurement rules and brand values around impartiality and independence of advice and guidance

Business Link brokerage

- K7 the information that should be included in a brief for suppliers
- K8 ways to develop criteria to select suppliers that will best meet clients' needs
- K9 what records need to be kept about brokerage solutions
- K10 how to make sure clients retain responsibility for choosing and using suppliers
- K11 the legislation, advisory regulations and organisational guidelines that the support programme should meet

Funding

- K12 the range of potential funding opportunities
- K13 the methods for accessing and applying for funding from the different funding agencies

CFABLB2

Broker Business Link clients to business support services

Additional Information

Behaviours

You need to show the following 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. gain respect by operating in a credible and professional manner
4. think strategically and take a holistic view of the way forward
5. generate justifiable alternatives to solve a problem or reach an outcome

CFABLB2

Broker Business Link clients to business support services

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CFABLB3 Manage a Business Link client portfolio



Overview

This is about managing a case load of clients that reflects the objectives of the regional economic strategy and ensures effective use of resources for business support. The portfolio should be well balanced with an appropriate rate of churn. Client journeys through the business support pathway should maintain momentum. Exit strategies should be developed for all clients.

CFABLB3

Manage a Business Link client portfolio

Performance criteria

You must be able to:

- P1 provide all clients with a single point of contact to help manage their experience of business support
- P2 maintain contact with all clients in order to track emerging needs and update them with new opportunities that may be relevant to them
- P3 manage a balanced portfolio of clients, consistent with the priorities and objectives of the regional economic strategy and your role
- P4 use effective strategies for taking on new clients and exiting from clients who have completed their business support journey
- P5 ensure that all clients in the portfolio are making appropriate business development progress
- P6 put in place strategies to deal with any clients who are failing to make adequate progress
- P7 identify and address difficulties in maintaining an effective portfolio
- P8 deliver targets for regional and national stakeholders only when you believe they are in the best interest of the client
- P9 explain constructively and positively the type and nature of the support you can offer the client under the business link brand when national and regional policy objectives influence it
- P10 effectively and consistently use the internal processes and procedures provided, including data collection and recording, to support the Business Link brand
- P11 use the customer relationship management system to research the client's history and to record the client's progress
- P12 ensure all service provision for which you are responsible meets Business Link brand requirements for conduct and professionalism and is independent, impartial and client focused

CFABLB3

Manage a Business Link client portfolio

Knowledge and understanding

You need to know and understand:

Client portfolio management

- K1 how to apply good practice portfolio management techniques to client case loads
- K2 how to identify difficulties in maintaining an effective portfolio early on
- K3 what strategies to use to:
 - K3.1 take on new clients
 - K3.2 accelerate progress of existing clients
 - K3.3 remove clients who are failing to make progress; and
 - K3.4 exit from clients who have completed their business support journey

Support relationships

- K4 the principles of relationship development and how good customer service principles can contribute to building long term client relationships
- K5 the business development progress that is appropriate for your clients

Business support services

- K6 how to keep up to date with new business support products and services under the Business Link brand and within the wider support network
- K7 how to identify which new business support products and services are in the best interests of your clients

CFABLB3

Manage a Business Link client portfolio

Additional Information

Behaviours

You need to show the following behaviours.

1. handle disagreements or resistance constructively and fairly
2. thinks strategically, takes a holistic view of the way forward
3. seeks the right information to analyse a situation and draw sound conclusions
4. effectively links objectives and actions to an overall strategy
5. strives to add value by achieving results in the best way

CFABLB3

Manage a Business Link client portfolio

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