

Business Link Gateway

National Occupational Standards

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CFABLG3

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.

CFABLG3

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

CFABLG3

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 caseloads
- 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 effective ways to maintain contact with all clients
- K6 the business development progress that is appropriate for your clients

Business support services

- K7 how to keep up to date with new business support products and services under the business link brand and within the wider support network
- K8 how to identify which new business support products and services are in the best interests of your clients

Business Link processes and procedures

- K9 the internal processes, procedures and systems that should be used and how to use them

CFABLG3

Manage a Business Link client portfolio

Additional Information

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

CFABLG3

Manage a Business Link client portfolio

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Version number 1

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Indicative review date January 2011

Validity Current

Status Original

Originating organisation Sfed

Original URN BL3

Relevant occupations Business, Administration and Law; Managers and Senior Officials

Suite Business Link Gateway

Key words business, link, broker, brand, clients, portfolio, support, deliver, information, advisor, support, networks, networking, quality, evaluate, maintain, effective, relationships, contact, roles, views, clients, resourcing, financing, development, investment

CFABLG4

Deliver a Business Gateway service to clients



Overview

This is about delivering a Business Gateway service to clients in a way that meets the requirements of the Business Link brand. This involves operating in a way that meets accepted Business Link practice while delivering business information that is appropriate to each client.

CFABLG4

Deliver a Business Gateway service to clients

Performance criteria

- You must be able to:*
- P1 provide clients with relevant and up to date information to introduce them to business link, partner and broker services
 - P2 communicate in ways that are appropriate to each client, will help them use the service, make best use of resources and meet accepted business link practice
 - P3 encourage clients to share their views and concerns freely with you and among their team and raise the matter sensitively if you detect a client is anxious about their business, allowing for the fact that their stated needs may not be their real needs
 - P4 identify when you can help clients to meet their own information needs by guiding them in the use of authoritative free and chargeable web-based services
 - P5 undertake research using different business gateway resources to identify information for clients
 - P6 present information to clients in ways that help them make business decisions and encourage them to ask for any additional help they need to interpret and use the information
 - P7 clearly explain and recommend suitable constructive alternatives to clients who are not eligible for the business link service
 - P8 manage client confidentiality in accordance with the requirements of the business link brand and your organisation

CFABLG4

Deliver a Business Gateway service to clients

Knowledge and understanding

You need to know and understand:

Interpersonal and communication skills

- K1 the principles of relationship development in the context of your own role and how good customer service can contribute to building long term relationships
- K2 the boundaries of the relationship between you and the client
- K3 the ways that different clients prefer to work and the extent to which you are able to meet these preferences
- K4 how to communicate with different clients at an appropriate level (eg start-ups, owner-managers, senior managers in large companies)
- K5 how to recognise when a client needs more specialist personal support or business advice

Business Link services

- K6 how to negotiate parameters and timescales with clients, their advisers or their brokers
- K7 the limitations on client confidentiality, how to obtain client consent and the limitations of the service you can offer to those who do not consent

Business support

- K8 the type of business support that is available to clients in your area, including pre-start and start-up businesses, established businesses, those businesses that are seeking to grow the businesses with high-growth potential
- K9 the scope, benefits, limitations and costs of business support and the referral process to enable clients to access it
- K10 the conditions for accepting clients onto different business support services
- K11 the roles that other business support agencies (public and private sector) may play in helping the client to develop their business

Business Information

- K12 the range of information resources suitable for accessing free and chargeable business information and how to use them
- K13 acceptable and understandable ways to present information to clients
- K14 the principles of how information can be used to support the decision making process within various business functions

Funding

- K15 the funding that is available to clients in your area
- K16 the eligibility criteria of funding agencies or government

CFABLG4

Deliver a Business Gateway service to clients

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. Gain respect by operating in a credible and professional manner
4. Confident about your own knowledge and ability
5. Delivers thoughts in straightforward terms, but maintains listener interest

CFABLG4

Deliver a Business Gateway service to clients

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CFABLG5

Improve the Business Gateway service you provide



Overview

This is about improving the Business Gateway service you provide in a way that meets the requirements of the Business Link brand. This involves improving the information that is available to clients by working with others.

CFABLG5

Improve the Business Gateway service you provide

Performance criteria

- You must be able to:*
- P1 identify cost effective opportunities to make new contacts that are likely to be relevant to you and your clients
 - P2 manage your personal and organisational business relationships ethically and professionally and behave in a way that builds confidence in the business link brand
 - P3 formally and informally share information about your own area of work with colleagues and contacts
 - P4 promote the use of any new information resource to internal and external customers
 - P5 identify any changes in the strategic priorities for business link and how they may affect the service you can give your customers

CFABLG5

Improve the Business Gateway service you provide

Knowledge and understanding

You need to know and understand:

Business Information

- K1 how to establish and balance the need for and cost of creating new resources
- K2 how to use your organisation's promotional activities to promote the new resource to internal and external users

Business Link services

- K3 The requirements of the Business Link Brand and any relevant contractual obligations associated with individual services
- K4 Your organisation's pricing and invoicing procedures

Business support

- K5 how to keep up to date with new business support products and services under the business link brand and within the wider support network
- K6 the different types of business that operate, for example, sole traders, limited companies, Plcs, not-for-profit organisations, social enterprises, etc.
- K7 the main issues that affect small businesses and how outside factors are affecting them, including UK and European regulations, government projects, economic trends, industrial trends and developments, geographical features and political and social issues

Networking

- K8 how building and using networks can add value to the service you provide to clients
- K9 how to evaluate and monitor information and support provided by contacts
- K10 how to deal with any problems arising when the service provided by contacts does not meet the standards you and your organisation expect
- K11 how to engage with and introduce new contacts into formal and informal networks

CFABLG5

Improve the Business Gateway service you provide

Additional Information

Behaviours

1. Appreciate how an organisation operates in different client sectors
2. Gain respect by operating in a credible and professional manner
3. Engenders co-operation by considering the perspective of others
4. Seeks the right information to analyse a situation and draw sound conclusions
5. Invites a two-way exchange of information and feedback with others

CFABLG5

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