
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.

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 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

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

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- 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

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