
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

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