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**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.

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**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

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**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

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<b>Original URN</b>	CFABLB3
<b>Relevant occupations</b>	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
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