

---

**Overview**

This standard is about assisting the clients in moving from opportunity to action, through mentoring, whether it is an individual considering starting their own business or the owner-manager of an existing business looking to develop and grow. It requires you to establish a good relationship with the client, explore the needs and priorities of the client, provide encouragement for action and change and introduce others who may be able to help the client move from opportunity to action.

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 ensure the client understands your role as a mentor and how it differs to other business support roles
  - P2 agree with the client the goals and rules of the mentoring process and how long the relationship may last
  - P3 help the client to express ideas and any concerns about their personal and/or business situation, plans and needs, without judging them, and provide appropriate feedback
  - P4 encourage the client to explain clearly what they want to achieve through comparing their needs and abilities with current personal and business practices
  - P5 recommend a programme of action which best meets the needs of the client
  - P6 agree with the client how and when to review progress against the programme of action
  - P7 encourage the client to take responsibility for setting their goals and to make their own decisions and actions
  - P8 encourage the client to develop the confidence, understanding and skills needed to meet their personal and business objectives
  - P9 present new information to the client in a way that they are able to understand and that is relevant to their needs
  - P10 recognise when you are giving business advice and no longer mentoring and act appropriately
  - P11 help the client to reflect on and learn from things that did not turn out as expected
  - P12 refer the client to relevant sources of information, advice and guidance, when it is required
  - P13 encourage the client to consider ways in which to review the support provided by others
  - P14 encourage the client to consider different perspectives when considering to use information, advice and guidance to improve their own learning and skills
  - P15 present a positive image of business and enterprise mentoring
  - P16 follow the code of ethics for mentoring that is set by you, your organisation

---

and/or a professional body

P17 keep up-to-date and accurate records of contact with the client

## Knowledge and understanding

### Principles of mentoring

#### You need to know and understand:

- K1 what your role is as a business and enterprise mentor
- K2 the ways in which mentoring is similar and different to other business support roles including business advice, coaching and consultancy
- K3 the code of ethics for mentoring that is set by your organisation and/or a professional body including the ways to work within the requirements and policies of the mentoring scheme in which you are involved
- K4 what are the rules on confidentiality and data protection and how to follow them
- K5 the different reasons the client might have for starting or running a business and how these will affect their goals
- K6 what rules to set for the mentoring process including how often to meet, the places and times to meet, what to do if someone cannot make a session and when to involve other work colleagues
- K7 how to identify and agree a contract for mentoring
- K8 the resources and facilities which may be needed for the mentoring process

### Manage the relationship with the client

#### You need to know and understand:

- K9 how your behaviour is different when you are mentoring in comparison to advising, coaching and consulting
- K10 how to recognise when you are not mentoring in a mentoring relationship with the client
- K11 the implications for the client when you are not mentoring in a mentoring relationship
- K12 the advantages and disadvantages of different communication methods
- K13 how different types of people learn and make sense of events
- K14 how to:
  - K14.1 create an environment in which the client will feel at ease
  - K14.2 make the mentoring experience effective for different types of client
  - K14.3 identify when the relationship has reached a natural end and conclude it in a way which is viewed by the client as positive
  - K14.4 develop the clients' enthusiasm, commitment and trust

- K14.5 actively listen to identify the clients' real situations, problems or needs
- K14.6 question with the client that they have understood your input
- K14.7 share information, ideas and arguments patiently and tactfully
- K14.8 inspire confidence, persistence and realism
- K14.9 build long-term relationships
- K14.10 give and receive feedback
- K14.11 deal with any difficulties and conflicts as far as possible
- K14.12 manage your time and activities
- K14.13 show respect for and sensitivity to the needs and feelings of the client and other stakeholders
- K14.14 avoid bias, preconceptions and judging of the client and other stakeholders
- K14.15 recognise the effect of your own actions and behaviour on the client and other stakeholders
- K14.16 present yourself positively to the client and other stakeholders
- K14.17 stay calm in difficult or uncertain situations
- K14.18 handle the client's and/other stakeholder's emotions without becoming personally involved in them

### Support client development

#### You need to know and understand:

- K15 what are the clients' personal goals including specific personal and/or business problems and targets
- K16 what further sources of support may be relevant to the client's needs
- K17 the advantages and disadvantages of different learning styles exhibited by the client
- K18 how to:
  - K18.1 help the client to identify practical and affordable solutions
  - K18.2 develop the clients' self-confidence
  - K18.3 encourage the client to review and develop skills that will improve personal and/or business development
  - K18.4 encourage the client to develop personal skills so they can develop the business opportunity by themselves
  - K18.5 allow the client to express themselves and take action to meet their

---

goals

K18.6 help the client to accept and manage change

---

**Additional information**

**Behaviours:**

- 1 respect the client's need for information, commitment and confidentiality
- 2 listen and respond effectively and check understanding
- 3 act in a way that shows you are willing to help the client
- 4 adapt your personal style to empathise with different types of client
- 5 build and maintain rapport over sustained periods
- 6 identify people's information needs
- 7 seek to understand people's needs and motivations
- 8 invite a two-way exchange of information and feedback with the client and others
- 9 comply with, and ensure that others comply with, legal requirements, industry regulations, organisational policies and professional codes

<b>Developed by</b>	Skills CFA
<b>Version number</b>	2
<b>Date approved</b>	November 2013
<b>Indicative review date</b>	November 2016
<b>Validity</b>	Current
<b>Status</b>	Original
<b>Originating organisation</b>	SFEDI
<b>Original URN</b>	CFABES020
<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
<b>Suite</b>	Business and Enterprise Support (2013)
<b>Key words</b>	business; enterprise; support; clients; awareness; engagement; networks; relationships; trust