

## 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

---

<b>Developed by</b>	CFA Business Skills @ Work
---------------------	----------------------------

---

<b>Version number</b>	1
-----------------------	---

---

<b>Date approved</b>	January 2009
----------------------	--------------

---

<b>Indicative review date</b>	January 2011
-------------------------------	--------------

---

<b>Validity</b>	Current
-----------------	---------

---

<b>Status</b>	Original
---------------	----------

---

<b>Originating organisation</b>	Sfedi
---------------------------------	-------

---

<b>Original URN</b>	BL3L
---------------------	------

---

<b>Relevant occupations</b>	Business, Administration and Law; Managers and Senior Officials
-----------------------------	---

---

<b>Suite</b>	Business Link Gateway
--------------	-----------------------

---

<b>Key words</b>	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
------------------	---