
Overview

This standard is about identifying external and/or internal customers for a proposed enterprise venture. It requires researching the needs of potential and existing customers, undertaking a segmentation of the market to group and prioritise the needs of potential customers, developing a strategy for engaging with different groups of customers and creating an identity or 'brand' for the venture which will encourage engagement with the venture by internal and external customer groups.

For the purposes of this standard, an 'organisation' can mean an independent entity such as a private sector business, a local authority, 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 organisations are working together towards common goals. A 'venture' refers to an idea for a new activity, development or project which will make a difference to the economic and/or social performance of the organisation.

The standard is recommended for managers and leaders in organisations, particularly at middle and senior levels, who are looking to make a positive, proactive and sustained difference to the organisation, its development and management.

**Performance
criteria**

- You must be able to:*
- P1 Analyse the current and future needs of existing and potential customers.
 - P2 Identify how the core proposition of the venture addresses the needs of existing and potential customers.
 - P3 Consult with colleagues on availability of organisational resources for identifying and segmenting customers.
 - P4 Assess the effectiveness of existing organisational approaches to identifying and segmenting customers.
 - P5 Consult with others to agree how to develop existing processes and activities for identifying and segmenting customers which will add value to the venture.
 - P6 Develop a segmentation framework and criteria to categorise customers for the enterprise venture.
 - P7 Construct a case for gaining resources to support the development of an engagement strategy for the venture.
 - P8 Identify methods of reviewing the effectiveness of the engagement strategy in relation to the vision and goals of the venture.
 - P9 Develop a strategy to identify how to engage with customer groups for the venture.

Knowledge and understanding

You need to know and understand:

- K1 The needs of current customers of the organisation and the extent to which the proposed venture addresses these needs.
- K2 Methods of analysing customer needs and the advantages and disadvantages of different methods.
- K3 Why it is important to segment the market for a proposed venture.
- K4 Approaches to segmenting a market, in order to identify potential customer group for the venture.
- K5 Methods for consulting with others to review approaches to identifying customers in the organisation.
- K6 How to select and use a market segmentation approach which is appropriate to the vision and goals of the venture.
- K7 How to develop an approach to reviewing the effectiveness of the segmentation framework to identifying customers for the proposed venture.
- K8 Key stages in the process of developing a case for accessing resources to support in identifying and segmenting customers.
- K9 How to benchmark the approaches of the organisation in identifying customers against the experience of other organisations.
- K10 Ways of engaging with customer groups and the associated advantages and disadvantages.
- K11 Influences on the success of a customer engagement strategy.
- K12 How to engage with external sources of support to assist in the development of the engagement strategy.
- K13 Why it is important to develop a core proposition for the venture which has clarity for potential groups of customers.
- K14 Benefits of consulting with others around the core proposition for the venture.
- K15 Ways of testing and validating the proposition of the proposed venture with potential customer groups.
- K16 How to use feedback from potential customer groups in finalising the proposition for the venture.

Behaviours

- 1 Seek to understand the needs and motivations of customers as people.
- 2 Create and maintain communication amongst colleagues in order to build relationships and a positive engagement process.
- 3 Create a sense of shared purpose in working together.
- 4 Work towards solutions that benefit the customers and the organisation.
- 5 Work to develop an atmosphere of professionalism and mutual support.
- 6 Clarify your own and customer' expectations of the relationship.
- 7 Encourage behaviour that shows respect, helpfulness and cooperation.
- 8 Keep commitments.
- 9 Anticipate future changes in customer behaviour.
- 10 Consider the impact of your own actions on the customers.
- 11 Show sensitivity to the needs and interests of customers and manage these effectively.

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Identify customers and how to engage them in an enterprise venture

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