

# CFAMBCB1

## Work with the client to understand their circumstances, problems and opportunities



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### Overview

This standard is about helping the client and stakeholders within the client's organisation to understand their situation and to define more clearly the problem or opportunity they are trying to address with consultancy support. The process involves helping the client to describe the presenting problem or opportunity, gathering, assessing and analysing information from relevant sources and, as a result, developing a clearer picture of the organisation's circumstances and the precise nature of the problem or opportunity to be addressed. The level of the consultant's involvement will vary according to the context. In some situations, the consultant will be required to actually do the work, i.e. carry out the research and analysis and simply present findings to the client. At other times, the consultant may be asked to play a more facilitative role, introducing tools and techniques and providing expertise to help the client and people in the client's organisation to undertake the research themselves. A facilitative approach helps the client to gain a deeper understanding of the issues and, at the same time, learn new skills. This standard has been prepared in such a way as to allow for a range of different levels of involvement.

It is for consultants who work closely with clients to help them gain a fuller understanding of their circumstances and a closer definition of the problems and opportunities they face.

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### Performance criteria

*You must be able to:*

- P1 work with the client and relevant stakeholders to articulate the nature of the problem or opportunity they are trying to address with your support
- P2 gather, or help the client to gather, information that may impact on the problem from a variety of relevant external as well as internal sources
- P3 assess, or help the client to assess, the information gathered to ensure it is valid, current, relevant and sufficient to provide a reliable and balanced view of the client's circumstances
- P4 use appropriate tools and techniques to analyse, or help the client to analyse, the information gathered
- P5 agree with the client and relevant stakeholders within the client's organisation a common understanding of their circumstances in the broader environment
- P6 work with the client to confirm or redefine the nature of the problem or opportunity they are trying to address in light of the analysis of the information gathered
- P7 work with the client to review their circumstances, problems and opportunities at appropriate times

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### Knowledge and understanding

*You need to know and understand:*

#### **Principles, methods, tools and techniques relating to:**

- K1 analysing organisational culture
- K2 business analysis
- K3 building consensus
- K4 communication
- K5 defining and agreeing roles and responsibilities
- K6 establishing, developing and sustaining working relationships
- K7 evaluation
- K8 facilitation
- K9 information management and confidentiality
- K10 research and investigation
- K11 reviewing organisational performance

#### **Industry/sector specific knowledge and understanding**

- K12 relevant industry/sector specific knowledge and information on trends and developments
- K13 relevant industry/sector specific legal, regulatory, professional and ethical requirements

#### **Context specific knowledge and understanding**

- K14 key political, economic, social, technological, legal and environmental factors
- K15 knowledge and information on trends and developments in your professional/specialist/technical area
- K16 knowledge and understanding of the type and stage of growth of the organisation you are working with
- K17 relevant policies, procedures and requirements of the client organisation
- K18 your own knowledge, skills and competence and the limits of these

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### Additional Information

#### Behaviours

1. Encourage clients to take responsibility for their own actions
2. Facilitate common understanding and consensus
3. Use appropriate facilitation principles, methods, tools and techniques effectively
4. Comply with legal requirements, industry regulations, organisational policies and professional codes
5. Keep confidential information secure
6. Check the validity and reliability of information
7. Work to develop an atmosphere of professionalism, mutual support and respect
8. Display a good understanding of how different factors in the work context relate to each other
9. Maintain up-to-date information on the political, economic, social, technological, legal and environmental factors that impact on work
10. Identify the range of elements in a situation and how they relate to each other
11. Build a valid picture from restricted or incomplete data
12. Articulate the assumptions made, and known risks involved, in understanding a situation

#### Links to other NOS

It links closely with all other standards in key area B Work with the client to identify their needs and agree solutions. It is also underpinned by A2 Develop and Sustain relationships with clients.

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**Relevant occupations** Business, Administration and Law; Arts, Media and Publishing; Professional Occupations; Managers and Senior Officials; Social sciences; Education and training; Preparation for life and work; Media Associate Professionals; Finance; Communications; General; Business and Finance Associate Professionals; Public Service and Other Associate Professionals

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**Suite** Management and Business Consultancy NOS 2009; NOS Suite for Management and Business Consultancy;

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