

CFAMBCB2

Work with the client to generate and evaluate solutions



Overview

This standard is about helping the client to select an appropriate solution to address their problem or opportunity. A critical question is 'who should be involved in deciding on the solution, and at what stage, in order both to benefit from their ideas and experience and gain their support by sharing responsibility for decision-making with them?' 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. identify and evaluate options and propose a solution, supported by a rationale and an analysis of advantages, disadvantages, risks and assumptions, for consideration by the client. At other times, the consultant may be asked to play a more facilitative role, introducing principles, methods, tools and techniques and providing expertise to help the client and people in the client's organisation to explore the options and arrive at the solution 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 explore options and decide on solutions to address their problems and opportunities.

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Performance criteria

- You must be able to:*
- P1 agree who is to be involved and when, taking account of their ability to generate options and influence the implementation of solutions
 - P2 identify and agree eligibility criteria that options must meet in order to be considered for detailed evaluation
 - P3 identify and agree appropriate criteria for detailed evaluation of options
 - P4 generate a broad range of possible options for addressing their problem or opportunity
 - P5 evaluate the costs and benefits, advantages and disadvantages of the eligible options or combination of options against the agreed criteria
 - P6 identify and evaluate the risks involved in the possible options and consider how these risks might be mitigated
 - P7 select the option or combination of options which best meets the agreed criteria
 - P8 review and redefine the criteria, if no identified option satisfactorily meets the agreed criteria

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Knowledge and understanding

You need to know and understand:

Principles, methods, tools and techniques relating to:

- K1 business analysis
- K2 communication
- K3 defining and agreeing roles and responsibilities
- K4 establishing, developing and sustaining working relationships
- K5 evaluation
- K6 facilitation
- K7 project management
- K8 risk management

Industry/sector specific knowledge and understanding

- K9 relevant industry/sector specific knowledge and information on trends and developments
- K10 relevant industry/sector specific legal, regulatory, professional and ethical requirements

Context specific knowledge and understanding

- K11 key political, economic, social, technological, legal and environmental factors
- K12 knowledge and information on trends and developments in your professional/specialist/technical area
- K13 knowledge and understanding of the type and stage of growth of the organisation you are working with
- K14 relevant policies, procedures and requirements of the client organisation
- K15 your own knowledge, skills and competence and the limits of these

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Additional Information

Behaviours

1. Generate and recognise valid and workable solutions
2. Use appropriate facilitation principles, methods, tools and techniques effectively
3. Support clients in planning, making and sustaining improvements autonomously
4. Comply with legal requirements, industry regulations, organisational policies and professional codes
5. Act within the limits of your authority and competence
6. Keep confidential information secure
7. Identify clearly the value and benefits to people of a proposed course of action
8. Work towards win-win solutions
9. Develop plans to meet the priorities of decision-makers
10. Work to develop an atmosphere of professionalism, mutual support and respect
11. Identify the implications or consequences of a situation
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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