

## CFAMBCB4

# Work with the client to plan the implementation of solutions



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### Overview

This standard is about helping the client to develop a detailed plan to implement the required solutions. It mirrors the project planning process but recognises that the consultant is not in the role of project manager, but rather is providing expertise and facilitation skills to help the client plan the project for implementing solutions. A critical question is 'who should be involved in the planning and at what stage, in order both to benefit from their ideas, skills and experience and gain their support by sharing responsibility for decision-making with them?'

It is for consultants who work closely with clients to help them develop detailed plans for implementing solutions.

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### Performance criteria

- You must be able to:*
- P1 agree who is to be involved, taking account of their role in the implementation and their planning skills
  - P2 define and agree clear aims, SMART objectives and expected benefits, together with measures and criteria to evaluate whether these have been achieved
  - P3 explore the range of possible implementation methods and select the most appropriate method or combination of methods
  - P4 identify and evaluate obstacles to implementation and plan how to overcome these obstacles
  - P5 identify and evaluate the risks involved and plan how these risks are to be managed
  - P6 develop a detailed implementation plan, broken down into manageable work packages with identified resources, responsibilities and timescales
  - P7 specify within the plan how contingencies, opportunities and challenges are to be handled
  - P8 confirm the feasibility of the implementation plan by exposing it to those involved and other sources of expertise, if required
  - P9 develop a suitable process for monitoring progress against the plan
  - P10 develop a strategy for communicating the planned improvements and the progress towards them, including opportunities for people to give feedback
  - P11 win the support of those involved in or affected by the implementation plan, by explaining the plan at an appropriate level of detail and responding effectively to any questions or concerns

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### Knowledge and understanding

*You need to know and understand:*

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

- K1 building consensus
- K2 change management
- K3 communication
- K4 defining and agreeing roles and responsibilities
- K5 establishing, developing and sustaining working relationships
- K6 facilitation
- K7 influencing
- K8 monitoring
- K9 objective setting
- K10 planning
- K11 problem-solving
- K12 project management
- K13 providing feedback
- K14 risk management

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

- K15 relevant industry/sector specific legal, regulatory, professional and ethical requirements

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

- K16 relevant policies, procedures and requirements of the client organisation
- K17 sources of advice, guidance and support
- K18 your own knowledge, skills and competence and the limits of these

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### Additional Information

#### Behaviours

1. Find practical ways to overcome barriers to change
2. Adopt communication media and styles appropriate to people and situations
3. Present information clearly, concisely, accurately and in ways that promote
4. Facilitate common understanding and consensus
5. Use appropriate facilitation principles, methods, tools and techniques effectively
6. Support clients in planning, making and sustaining improvements autonomously
7. Comply with legal requirements, industry regulations, organisational policies and professional codes
8. Act within the limits of your authority and competence
9. Keep confidential information secure
10. Identify clearly the value and benefits to people of a proposed course of action
11. Use factual evidence to support arguments
12. Work to develop an atmosphere of professionalism, mutual support and respect
13. Work towards a clearly defined vision of the future

#### 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 and leads on to the standards in key area C Support the client in achieving sustainable solutions. It is also underpinned by A2 Develop and Sustain relationships with clients

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**Developed by** CFA Business Skills @ Work

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**Relevant occupations** Business, Administration and Law; Information and Communication Technology; Arts, Media and Publishing; Health, Public Services and Care; Professional Occupations; Managers and Senior Officials; Research Professionals; Associate Professionals and Technical Occupations; Corporate Managers and Senior Officials; Retail and commercial enterprise; Education and training; Teaching and lecturing; Direct learning support; Preparation for life and work; Foundations for learning and life; Preparation for work; Accounting and finance; Administration; Business management; Functional Managers; Legal Professionals; Public Service Professionals; Government and Related Organisations; Finance; Communications; General; Business and Finance Associate Professionals

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

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**Key words** clients, plan, implementation, solutions

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