



## **Business Information Officer Endorsed Programme 34 hours**

### **Learning Outcomes for this Programme**

The learner will:

- Assess whether the ethical and professional standards expected of business information officers are met
- Plan and implement own personal development
- Develop own professional networks
- Evaluate the quality of your own practice in business information
- Develop own ability to provide business information
- Deal with initial business information enquiries from clients and identify their needs
- Research and provide clients with the business information they need
- Contribute to administering and promoting business information services
- Provide and maintain the materials needed to deliver business information
- Have the knowledge of a small business and its core functions

### **This programme is made up of the following**

Section 1	Personal Professional Development	7 hours
Section 2	Dealing with initial business information enquiries	5 hours
Section 3	Researching and providing clients with the Business information they need	5 hours
Section 4	Contributing to administering and promoting business information services	5 hours
Section 5	Providing and maintaining the materials needed to deliver business support	5 hours
Section 6	Knowing how a small business works	7 hours



## **Duration**

- 34 guided development and assessment hours

## **Assessment methods**

- Assessment is undertaken in line with the SFEDI National Assessment Strategy for Business Information 2008
- Assessment will include observation of practice, work based product evidence and presentation of CPD plan and record.



<b>Title:</b>	<b>Personal Professional Development</b>		<b>1</b>
<b>Learning outcomes</b> <b>The learner will</b>	<b>Assessment criteria</b> <b>The learner can (in an organisation with which the learner is familiar)</b>		
1. Assess whether the ethical and professional standards expected of business advisors are met	1.1	Review own work practices in order to assess whether they meet the ethical and professional standards expected of business advisers, and identify improvements that could be made to own work practices	
2. Plan and implement own personal professional development	2.1 2.2	Investigate own continuing professional development needs, taking into account changes in own work roles and operating environment Devise and implement personal development plans based on identified needs	
3. Develop own professional networks	3.1 3.2	Assess the quality of own current networks and identify how they could be improved Implement plans for improving own professional networks, and identify the outcomes of these efforts	
4. Review and improve enterprise services offered by self or employers	4.1 4.2	Use performance monitoring techniques to review the enterprise training services offered by self or employers Identify and implement opportunities for improving enterprise training services offered by self or employers	
<b>Additional information about the unit</b>			
<b>Links to NOS:</b> Based on Units 5, 6 and 7 of SFEDI NOS for Business Information (approved 2008)			
<b>Unit aim(s)</b>  To equip business information officers with the skills to manage their continuing personal professional development.			

	<b>Indicative content:</b>
1	<ul style="list-style-type: none"> <li>• The reasons for reviewing their own performance and the limitations of self-appraisal</li> <li>• Professional codes of conduct and ethics for business advisers</li> <li>• Reliable sources of feedback from, for example, line managers, supervisors, peers, mentors, fellow learners and professional associations</li> <li>• Methods for monitoring and recording work practices with clients</li> <li>• The standards of performance set by professional associations, commissioning bodies, contractors and business support providers</li> </ul>
2	<ul style="list-style-type: none"> <li>• The principles of continuing professional development</li> <li>• Personal learning styles and preferences</li> <li>• Action-planning techniques</li> <li>• A range of work-based learning activities, for example:               <ul style="list-style-type: none"> <li>• Learning logs</li> <li>• Mentoring</li> <li>• Projects</li> <li>• Work shadowing</li> <li>• Books, journals, videos, CDs and other media</li> </ul> </li> <li>• Sources of continuing professional development for business advisers</li> <li>• The personal development policies and practices of their employer</li> </ul>
3	<ul style="list-style-type: none"> <li>• Communication and interpersonal skills associated with networking</li> <li>• How networks are established and developed, the distinctions between formal and informal networks, and methods for extending and strengthening networks</li> <li>• The ethics of using contacts and networks for the benefit of clients, and the limitations of networks in recruitment, procurement and contracting</li> <li>• Policies and guidelines on client confidentiality, sharing client data, sharing access to management information systems, equal opportunities, diversity and social inclusion</li> </ul>
4	<ul style="list-style-type: none"> <li>• The importance of establishing and applying appropriate measures for evaluating the performance of business support services</li> <li>• Sources of information about the performance of other business support providers</li> <li>• Systems for collecting and assessing performance monitoring data</li> <li>• How to use performance assessments to identify opportunities for improvements to services</li> <li>• Customer services standards and practices used by business support providers, including practices for contracts and agreements with clients, handling complaints and disputes, client confidentiality, and professional indemnity</li> <li>• Current approaches to evaluating business support services used by and for government agencies</li> </ul>



<b>Title:</b>	<b>Dealing with initial business information enquiries</b>		<b>2</b>
<b>Learning outcomes</b> The learner will		<b>Assessment criteria</b> The learner can (in a context within which the learner is familiar)	
1. Respond to enquiries from clients for business information	1.1 1.2	Deal with client enquiries efficiently and politely in line with relevant guidelines for providing support services Maintain contact and exchange information with clients	
2. Ask the right questions to find out what the client needs	2.1 2.2	Ask questions to understand what the client needs so that appropriate business information can be provided Ask for advice and guidance when it is not clear what the client's business needs are	
3. Build relationships with clients by e mail, telephone or face to face so that they gain confidence in the service	3.1 3.2 3.3	Manage clients expectations of in responding to their information needs in terms of potential benefits, limitations, timescales and any costs involved Propose and promote services that are likely to meet your clients needs Advise clients about any funding that they are eligible to claim for business support services	
<b>Additional information about the unit</b>			
<b>Links to NOS:</b> Based on Unit 1of the SFEDI NOS for Business Information (2008)			
<b>Unit aim(s)</b> To allow information officers to deal with client enquiries			

	<b>Indicative content:</b>
1	<p><i>Interpersonal and communication skills</i></p> <p>How to use effective interpersonal and communication skills, including, when appropriate:</p> <ul style="list-style-type: none"> <li>○ dealing with clients with different backgrounds and cultures;</li> <li>○ listening fully and attentively;</li> <li>○ questioning and reflecting back;</li> <li>○ checking accuracy;</li> <li>○ summarising;</li> <li>○ respecting and acknowledging issues;</li> <li>○ interviewing, reviewing and deciding on needs;</li> <li>○ negotiation;</li> <li>○ giving, receiving and passing on constructive feedback;</li> <li>○ guaranteeing client confidentiality; and</li> <li>○ dealing with difficulties.</li> </ul> <ul style="list-style-type: none"> <li>• The benefits and drawbacks of different kinds of communication in different circumstances (for example, face-to-face contact, phone, fax and e-mail).</li> <li>• How to deal with clients whose first language is not English.</li> <li>• Different ways that clients may react to and take in information.</li> <li>• The importance of pacing information in a way that will aid understanding to suit the client's capacity to absorb it.</li> <li>• Why and when to check that the client is making sense of the information you are presenting.</li> </ul>
2	<p><i>Client information needs</i></p> <ul style="list-style-type: none"> <li>• How to recognise the nature of the enquiry and why the client needs the information or product.</li> <li>• What questioning techniques may be suited to the client's communication style and information needs.</li> <li>• How to deal with an enquiry in a way that satisfies the client.</li> <li>• The answers to frequently asked questions from clients.</li> <li>• The client's personal and business objectives and needs.</li> <li>• The client's business operations.</li> <li>• How to investigate beyond the client's stated needs to explore what their real needs may be.</li> <li>• How business needs may vary in terms of: <ul style="list-style-type: none"> <li>• size;</li> </ul> </li> </ul>

	<ul style="list-style-type: none"> <li>• stage of development;</li> <li>• the industrial sector they operate in; and</li> <li>• whether they are public, private or voluntary sector.</li> <li>• How to identify whether a client's business information needs can be met by your organisation or by any other services.</li> <li>• The limits of your own skills and knowledge.</li> <li>• When and where to get any advice, if you do not understand the client's business.</li> <li>• The importance of operating legally.</li> </ul>
3	<p><i>Business information research skills</i></p> <ul style="list-style-type: none"> <li>• The advantages and disadvantages of different sources of information, including: <ul style="list-style-type: none"> <li>○ local information;</li> <li>○ statistical information;</li> <li>○ market research information;</li> <li>○ in-house or online databases, business directories and guides;</li> <li>○ newspapers, periodicals and specialist business publications;</li> <li>○ information on companies and products;</li> <li>○ information from councils and government; and</li> <li>○ information about legislation (eg Employment Law, Health and Safety Law, Business taxation, Environmental protection, Intellectual property, International trade).</li> </ul> </li> <li>• How to research different information systems (eg the Internet, own organisation's information materials or another organisation's resources).</li> <li>• How to exploit the potential of computer and paper-based information systems.</li> </ul>
4	<p><i>Business support services</i></p> <ul style="list-style-type: none"> <li>• The features and benefits of the business support services provided by your organisation, and those of any other local or national services that you direct clients to (eg business and specialist advice, training, workshops or academic courses).</li> <li>• Roles and responsibilities within your organisation.</li> <li>• The guidelines for providing support services set by your organisation or professional body about: <ul style="list-style-type: none"> <li>• maintaining confidentiality in different working environments;</li> <li>• ethics, values and professional standards;</li> <li>• equal opportunities, diversity and social inclusion;</li> <li>• funding and other support available to the client;</li> </ul> </li> </ul>



	<ul style="list-style-type: none"><li>• using information management systems;</li><li>• using invoicing systems, pricing and credit-control policies; and</li><li>• procedures for quality assurance and handling complaints.</li><li>• The role of your organisation in developing competition among local businesses.</li></ul>
5	<p><i>Funding and resources</i></p> <ul style="list-style-type: none"><li>• What business support is available, what the referral procedures and costs are (for example, other kinds of business support, specialist advice, learning and information resources).</li><li>• How to co-ordinate support services that match different client needs.</li><li>• The funding that is available and relevant to the client's needs.</li><li>• The procedures of funding agencies.</li></ul>



<b>Title:</b>	<b>Researching and providing clients with the business information they need</b>		<b>3</b>
<b>Learning outcomes The learner will</b>	<b>Assessment criteria The learner can (in a context within which the learner is familiar)</b>		
1. Provide clients with the business information they need in a way in which they can understand it	1.1	Identify clearly the type and range of information required	
	1.2	Identify and evaluate the sources of information for their contribution to the research	
	1.3	Access the sources of information according to agreed procedures	
2. Identify when and how to research additional information	2.1	Identify any problems with the collection of necessary information	
	2.2	Collect information in line with the requirements of the research	
3. Present the results of the research in a manner appropriate to its aims and objectives	3.1	Acknowledge appropriately all sources of research	
	3.2	Evaluate the success of the research against the specified evaluation criteria	
	3.3	Record the collected information and the results in the appropriate systems	
<b>Additional information about the unit</b>			
<b>Links to NOS:</b> Based on Unit 2 of the SFEDI NOS for Business Information (2008)			
<b>Unit aim(s)</b>			
To allow information officers to research and provide clients with the business information they need			

	<b>Indicative content:</b>
1	<p><i>Identify sources and availability of information</i></p> <ul style="list-style-type: none"> <li>• What types of information are required.</li> <li>• What the potential sources of information are.</li> <li>• How the sources of information have cooperated in the past.</li> <li>• Why it is important to be clear about the research being undertaken.</li> <li>• What the access procedures for different types of information are.</li> <li>• The rules of confidentiality relating to different types of information.</li> <li>• What the different risks are that should be considered, and how to minimise their effects.</li> <li>• What the types of problem are that could occur, what actions can be taken to address them, why it is important to address problems and the implications are of not addressing the problems.</li> </ul>
2	<p><i>Collect information to achieve research objectives</i></p> <ul style="list-style-type: none"> <li>• What the agreed procedures are for accessing information.</li> <li>• Which information collection procedures are required.</li> <li>• Why it is important to apply the collection methods correctly and consistently and the consequences of not doing so.</li> <li>• What types of problem could occur, what actions can be taken to address them, why it is important to address problems, and the implications of not addressing the problems.</li> <li>• What the systems are for recording information, the procedures relating to the use of these, and why it is important to use these systems.</li> </ul>
3	<p><i>Analyse information collected from the research</i></p> <ul style="list-style-type: none"> <li>• Which analysis methods could be used.</li> <li>• What analysis methods have proved most useful in the past.</li> <li>• How to use the analysis methods.</li> <li>• Why it is important to provide a rationale for the results.</li> <li>• What types of result are expected and the possible reasons for unexpected results.</li> <li>• What the systems for recording analysis results are and the procedures that relate to the use of these, and why it is important to use the systems.</li> <li>• Who should be involved in reviewing the research.</li> </ul>

4	<p><i>Report the results of the research</i></p> <ul style="list-style-type: none"> <li>• How to present different types of research results.</li> <li>• Who should be acknowledged in the research.</li> <li>• Who should be involved in reviewing the research.</li> <li>• What types of information sources should be protected.</li> <li>• What types of information might be confidential.</li> <li>• What the criteria are for evaluating the success of the research.</li> <li>• What the systems are for recording research results, the procedures that relate to the use of these, and why it is important to use the systems.</li> <li>•</li> </ul>
5	<p><i>Comply with legislation and guidance</i></p> <ul style="list-style-type: none"> <li>• The relevant national, local, professional, and organisational requirements that relate to equal opportunities, discrimination, health and safety, security, confidentiality, and data protection.</li> <li>• Why it is important to comply with different requirements.</li> <li>• What the consequences are of not complying with different requirements.</li> <li>• How to obtain information on the requirements.</li> </ul>



<b>Title:</b>	<b>Contributing to administering and promoting business information services</b>		<b>4</b>
<b>Learning outcomes The learner will</b>	<b>Assessment criteria The learner can (in a context within which the learner is familiar)</b>		
1. Handle day to day administration to enable an effective business information service to be provided	1.1	Set up and update client records	
	1.2	Maintain complete, accurate and up to date records	
	1.3	Make sure that the necessary materials are available for the business information service to operate on a day to day basis	
2. Maintain diaries, records of clients and follow ups	2.1	Plan and manage your own time and other colleagues activities	
	2.2	Plan and organize meetings or events	
3. Administer activities designed to promote and provide business support services	3.1	Prepare and supply materials needed to inform clients and others about the support services available	
	3.2	Make sure that activities support and promote effective customer service	
<b>Additional information about the unit</b>			
<b>Links to NOS:</b> Based on Unit 3 of the SFEDI NOS for Business Information (2008)			
<b>Unit aim(s)</b>			
To enable information officers to administer and promote business information services			

	<b>Indicative content:</b>
1	<p><i>Communication and interpersonal skills</i></p> <ul style="list-style-type: none"> <li>• How to listen and question.</li> <li>• How to summarise and exchange information.</li> <li>• How to interview, review and decide on needs.</li> <li>• How to negotiate, challenge and deal with difficulties.</li> <li>• Your colleagues' and contacts' interests, skills and preferred ways of working with you.</li> </ul>
2	<p><i>Client records</i></p> <ul style="list-style-type: none"> <li>• What and when information is recorded about client contacts and follow up.</li> <li>• How to set-up, maintain and monitor records using your organisation's client relationship management (CRM) system.</li> <li>• The legislation and organisational guidelines relevant to client records (such as about data protection, freedom of information, confidentiality).</li> </ul>
3	<p><i>Diary systems</i></p> <ul style="list-style-type: none"> <li>• Why it is important to use diary systems to plan and co-ordinate activities and resources.</li> <li>• How to make diary entries using your organisation's diary system.</li> <li>• How to prioritise and balance competing requirements and resources.</li> <li>• How to negotiate and agree any changes to arrangements and make sure that all those involved have been informed.</li> <li>• The types of security and confidentiality issues relevant to diary systems and how to manage them.</li> </ul>
4	<p><i>Materials</i></p> <ul style="list-style-type: none"> <li>• What materials are needed by the service on a day-to-day basis and how they are organised (eg stationery, publicity materials or information packs).</li> <li>• How materials are procured within the available budget.</li> <li>• The different types of information materials that need to be organised.</li> <li>• Why it is important to store information securely.</li> <li>• How to layout and structure information materials so that they can be accessed easily by users.</li> <li>• How to organise and present indexes or catalogues so that users can easily locate</li> </ul>

	<p>information materials.</p> <ul style="list-style-type: none"> <li>• How to use computer and machine-based information storage systems.</li> </ul>
5	<p><i>Meetings or events</i></p> <ul style="list-style-type: none"> <li>• The purpose and resources needed in advance and on the day (such as budget, venue, equipment, catering, information).</li> <li>• The role and responsibilities of those involved, including any health, safety and security requirements that need to be taken into account.</li> <li>• Who will attend, when and how they will be invited, and any special requirements they may have.</li> <li>• How to present business support services effectively to different audiences.</li> <li>• The types of problems that may occur during the event or meeting and how to solve these.</li> <li>• Whether any records will be kept or circulated afterwards, by whom and how.</li> </ul>
6	<p><i>Customer service</i></p> <ul style="list-style-type: none"> <li>• What is meant by the term 'customer' and who the customers are for your team and organisation.</li> <li>• Why effective and efficient customer service, and continuous improvement, is important.</li> <li>• The quality standards that apply to customer service.</li> <li>• How to set and meet timescales and quality standards for your customers.</li> <li>• Why it is important to monitor customer satisfaction and how to do so.</li> <li>• The types of problems that customers may experience and how to solve them.</li> </ul>



<b>Title:</b>	<b>Providing and maintaining the materials needed to deliver business information</b>		<b>5</b>
<b>Learning outcomes</b> <b>The learner will</b>	<b>Assessment criteria</b> <b>The learner can (in a context within which the learner is familiar)</b>		
1. Monitor and obtain materials needed to provide an up to date business information service	1.1	Review the information materials currently used by the service and its clients	
	1.2	Review the effectiveness of the materials used and explore future requirements	
	1.3	Specify and obtain the information materials that should be obtained	
2. Organise and catalogue the materials needed to provide an up to date business information service	2.1	Record and store the information materials in the appropriate systems	
	2.2	Protect information sources effectively from damage and inappropriate use or alteration	
3. Evaluate and improve the information materials	3.1	Identify any aspects of the information materials that could be improved	
	3.2	Identify the most appropriate methods for improving the information materials	
	3.3	Present a clear rationale for the improvements	
<b>Additional information about the unit</b>			
<b>Links to NOS:</b> Based on Unit 4 of the SFEDI NOS for Business Information (2008)			
<b>Unit aim(s)</b> To enable information officers to provide and maintain the materials needed to deliver business information			

	<b>Indicative content:</b>
1	<p><i>Identify the requirements for information materials in the service</i></p> <ul style="list-style-type: none"> <li>• What types of information materials are used.</li> <li>• Which aspects of the service they cover.</li> <li>• Who the clients are who use information materials.</li> <li>• What format the information materials are in.</li> <li>• How many people use the information materials.</li> <li>• Who can provide information on the use of the information materials.</li> <li>• Which potential clients would use the information materials.</li> <li>• What the potential future requirements of the information materials might be.</li> <li>• What the seasonal or other variations in demand for information materials might be.</li> <li>• Who can provide information on future requirements.</li> <li>• What types of trends or developments might occur.</li> <li>• How to assess the impact of information and communication technologies.</li> <li>• Which resources might be available.</li> <li>• What the constraints of the resources are.</li> <li>• Who requires information on the information materials being obtained.</li> </ul>
2	<p><i>Obtain information materials for use in the service</i></p> <ul style="list-style-type: none"> <li>• What methods could be available for obtaining information materials.</li> <li>• What the organisational guidelines and procedures are for accessing and obtaining information materials.</li> <li>• Which factors might affect the time scales for obtaining information materials.</li> <li>• Which resources are required for obtaining information materials.</li> <li>• How to assess the information materials' contribution to the service.</li> <li>• What types of problem could occur, what actions can be taken to address them, why it is important to address problems and the implications are of not addressing them.</li> <li>• What the systems for recording and storing information materials are, the procedures for using these and why it is important to use the systems.</li> </ul>

3	<p><i>Maintain and improve the use of information materials in the service</i></p> <ul style="list-style-type: none"> <li>• How often the information materials/ sources should be updated.</li> <li>• Who should be involved in reviewing the information materials and sources.</li> <li>• How to protect different types and formats of information materials and sources.</li> <li>• The potential types of damage which could occur to information materials.</li> <li>• How information sources could be inappropriately used or altered.</li> <li>• What information can be collected on the effectiveness of the information materials.</li> <li>• Which aspects of the information materials have the potential to be improved.</li> <li>• How to assess the effectiveness of the information materials.</li> <li>• What the evaluation criteria are for the effectiveness of the information materials and sources.</li> <li>• How to improve different types of information materials.</li> <li>• What types of improvement could be suggested.</li> <li>• Which resources are required to implement different types of improvement.</li> <li>• Why it is important to provide a clear rationale for improvements.</li> <li>• What types of evidence may be necessary to support the rationale for improvements.</li> <li>• Who should be consulted on improvements to information materials.</li> <li>• What the systems are for recording evaluations, the procedures relating to the use of these and why is it important to use the systems.</li> </ul>
4	<p><i>Comply with legislation and guidance</i></p> <ul style="list-style-type: none"> <li>• The relevant national, local, professional, and organisational requirements that relate to equal opportunities, discrimination, health and safety, security, confidentiality, and data protection.</li> <li>• Why it is important to comply with different requirements.</li> <li>• What the consequences are of not complying with different requirements.</li> <li>• How to obtain information on the requirements.</li> </ul>



<b>Title:</b>	<b>Knowing How a Small Business Works</b>		<b>6</b>
<b>Learning outcomes</b> The learner will	<b>Assessment criteria</b> The learner can (in a context within which the learner is familiar)		
1. Have knowledge of finance within a small business	1.1	Identify the basic principles of finance within a small business context	
2. Understand the marketing, sales and customer service functions	2.1	Understand the customers needs	
	2.2	Understand basic marketing and sales techniques	
3. Understand the small business experience	3.1	Recognise what it takes to run a small business	
<b>Additional information about the unit</b>			
<b>Links to NOS:</b> Based on SFEDI Unit 5 Introduction to Business Support Standards			
<b>Unit aim(s)</b> To develop knowledge and understanding of a small business and its core functions			

	<b>Indicative content:</b>
1	<ul style="list-style-type: none"> <li>• Working out financial requirements</li> <li>• Sourcing funding</li> <li>• Planning, monitoring and recording the cash flow</li> <li>• Opening and managing a bank account</li> <li>• Understanding financial accounts</li> <li>• Basic accounting terms and practices and the basic rules regarding business taxation</li> </ul>
2	<ul style="list-style-type: none"> <li>• Conducting market research ( for example to assess market conditions, to estimate potential customer base and to identify competition )</li> <li>• Understanding the customers needs</li> <li>• Delivering a good customer service and how you can measure and monitor it</li> <li>• Understanding terms of business</li> <li>• Basic marketing and sales techniques               <ul style="list-style-type: none"> <li>- advertising</li> <li>- promotion</li> <li>- pricing</li> </ul> </li> </ul>
3	<ul style="list-style-type: none"> <li>• The emotional investment entrepreneurs make in their businesses</li> <li>• The major functions needed in a small business and how they link to and support each other</li> <li>• What it takes to successfully start and run a small business</li> <li>• The competing demands and pressures of running a small business</li> <li>• The diverse capabilities required of entrepreneurs</li> <li>• The need for entrepreneurs to take risks</li> <li>• The recognition that running a business takes a lot of time, energy and commitment</li> <li>• When and how to apply the principles of running a small business in practice</li> </ul>