



Business Link Broker Endorsed Programme 35 hours

Learning Outcomes for this Programme

The learner will:

- Assess whether the ethical and professional standards expected of business advisors are met
- Plan and implement own personal development
- Develop own professional networks
- Review and improve business support services offered by self or employers
- Interact effectively with clients
- Deliver business support that is right for each client
- Deliver a business support services that meets the needs of your organisation
- Encourage clients to develop their confidence, knowledge and skills
- Help clients to review their business
- Help clients embrace change
- Support clients when action planning to improve their business
- Use their knowledge of small businesses in their interactions with clients
- Communicate effectively with their clients
- Manage clients expectations of confidentiality
- Help clients choose and use business support
- Effectively manage a case load of clients
- Implement Business Link principles and practices

This programme is made up of five sections

Section 1	Personal Professional Development	7 hours
Section 2	Building Business Support Relationships	7 hours
Section 3	Delivering Business Support	7 hours
Section 4	Working with Business Link Brokerage Clients	7 hours
Section 5	Providing Business Link Brokerage Service	7 hours

Duration

- 35 guided development and assessment hours

Assessment methods

- Assessment is undertaken in line with the SFEDI National Assessment Strategy for Business Support 2006
- Assessment will include observation of practice, work based product evidence and presentation of CPD plan and record.



Title:	Personal Professional Development		Section 1	
Learning outcomes The learner will	Assessment criteria The learner can (in an organisation with which the learner is familiar)			
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	Investigate own continuing professional development needs, taking into account changes in own work roles and operating environment		
	2.2	Devise and implement personal development plans based on identified needs		
3. Develop own professional networks	3.1	Assess the quality of own current networks and identify how they could be improved		
	3.2	Implement plans for improving own professional networks, and identify the outcomes of these efforts		
4. Review and improve business support services offered by self or employers	4.1	Use performance monitoring techniques to review the business support services offered by self or employers		
	4.2	Identify and implement opportunities for improving business support services offered by self or employers		
Additional information about the unit				
Links to NOS: Based on Units 5-8 of SFEDI NOS for Business Support (approved 2006)				
Unit aim(s) To equip business advisers with the skills to manage their continuing personal professional development.				

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



Title:	Building business support relationships	Section 2	
Learning outcomes The learner will	Assessment criteria The learner can (in an organisation with which the learner is familiar)		
1. Interact effectively with clients	1.1	Find a style of discussion and exchange that helps clients to be open about business matters	
	1.2	Maintain contact and exchange information with each client, in ways that are appropriate and meet their needs	
2. Deliver business support that is right for each client	2.1	Use a mode of consulting that is effective for each client at each stage of the relationship	
	2.2	Direct clients to other services when these will meet their needs more closely	
3. Deliver a business support service that meets the needs of your organisation	3.1	Make sure clients understand the roles and responsibilities of the support process and the limits of any contractual obligations	
	3.2	Follow your organisations processes and procedures when delivering business support.	
4. Encourage clients to develop their confidence, knowledge and skills	4.1	Work with clients in ways that allow them to develop their skills and knowledge for themselves	
	4.2	Work with clients in ways that improves their confidence in how they manage their business	
Additional information about the unit			
Links to NOS: Based on Units 1-4 of SFEDI NOS for Business Support (approved 2006)			
Unit aim(s)			
To equip business advisers with the skills to build effective business support relationships with their clients.			

	Indicative content:
1	<ul style="list-style-type: none"> • How to use effective interpersonal and communication skills, including, when appropriate: <ul style="list-style-type: none"> • listening fully and attentively; questioning; <ul style="list-style-type: none"> • checking accuracy; • summarising; • reflecting back; • challenging; • respecting and acknowledging issues; • negotiation; • giving, receiving and passing on constructive feedback; • dealing with difficulties. • The benefits and drawbacks of different kinds of communication in different circumstances (for example, face-to-face contact, phone, fax and e-mail). • The dynamics of business support relationships. • How to detect if a client is anxious about their business and raise the matter sensitively.
2	<ul style="list-style-type: none"> • Ways to respond to clients' values, ways of thinking and business needs • Ways to tailor your approach to align with clients' goals and circumstances • How to agree with the client: <ul style="list-style-type: none"> • When you will provide feedback • what actions you will carry out • when you will make yourself available • Methods to encourage clients to clearly explain what they want to achieve so that you can identify and arrange support services that may help them • Ways to propose and promote services (including costs) that are likely to meet clients needs • The principles and practice of different modes of consulting (for example, acceptant, catalytic, confrontational and prescriptive). • Ways to encourage clients to judge when and how to share their views and concerns with you and among their team. • Ways to clarify the roles and needs of different team members if you are working with a client team • Ways of resourcing, including financing, support for business development and assessing returns on investment. • The boundaries of the relationship between you and the client • The ways that different clients prefer to work; • The limits of your own abilities and understanding of business practice. • Ways to recognise when a client needs more specialist: <ul style="list-style-type: none"> • personal support (for example, through conversation with you, reference to a counsellor or agreeing it's nothing to do with you); and • business advice (for example, an accountant, financial advisor, marketing specialist, IT consultant, e-business adviser and so on). • The features and benefits of the business support services you provide, and those of any other services that you direct clients to. • Who is qualified to give specialist advice and when to direct clients to them. • How to co-ordinate support services that match different client needs.

	<ul style="list-style-type: none"> • The funding that is available and relevant to clients' needs. • The procedures of funding agencies.
3	<ul style="list-style-type: none"> • Ways to end an engagement with a client in a way that encourages them to contact you for support in the future. • Ways to review with clients how they feel the relationship with you and your organisation is going • Processes for keeping up-to-date and accurate records of client contact at all stages of the relationship. • How to maintain client confidentiality. • The conditions for accepting clients onto different business support services • The benefits and drawbacks of working in different physical locations (for example, your organisation's premises or your client's premises) • The limitations of your role and responsibilities. • Any relevant contractual obligations. • The guidelines for providing support services set by your organisation or professional body about: <ul style="list-style-type: none"> • maintaining confidentiality in different working environments; • ethics, values and professional standards; • equal opportunities, diversity and social inclusion; • funding and other support available to the client; • using information management systems; • using invoicing systems, pricing and credit-control policies; and • procedures for quality assurance and handling complaints. • The role of your organisation in developing competition among local businesses.
4	<ul style="list-style-type: none"> • Ways to work with clients to help them to review and develop skills that will improve their ability to compete with other businesses (for example, mentoring, coaching and e-learning). • Ways to identify the knowledge and skills that clients need • The theories and application of learning styles (for example, Kolb experiential model; auditory, visual, tactile/kinaesthetic; collaborative/activist, individual/reflective, theory-based/theorist or practice-led/pragmatist). • Ways to identify effective ways of learning • What obstacles or barriers there may be to changing working or business practices (for example, personal emotional baggage or objections from other business partners). • The available support services and resources and how they can be accessed, combined and co-ordinated • Ways to develop clients' self-confidence. • Ways to respond to the client's values, ways of thinking and business needs. • Ways to assist client's decision making to promote their autonomy. • Effective delegation



Title:	Delivering business support	Section 3	
Learning outcomes The learner will	Assessment criteria The learner can (in an organisation with which the learner is familiar)		
1. Help clients review their business	1.1	Work with clients to analyse their business and decide the way forward	
	1.2	Inspire clients to decide how to develop their business	
2. Help clients embrace change	2.1	Evaluate clients' readiness to implement changes and help them develop the necessary commitment	
	2.2	Challenge clients to evaluate and prioritise changes and put them into practice	
3. Support clients when action planning to improve their business	3.1	Work with clients to devise and evaluate an action plan for improving the performance and sustainability of their business	
	3.2	Show clients how to implement and monitor their action plan and deal with any necessary contingencies or re-planning.	
Additional information about the unit			
Links to NOS: Based on Units 2-4 of SFEDI NOS for Business Support (approved 2006)			
Unit aim(s)			
To equip business advisers with the skills to work with their clients to develop their businesses.			

	Indicative content:
1	<ul style="list-style-type: none"> • Ways to identify clients': <ul style="list-style-type: none"> • business aspirations; • style of learning; • obstacles and stated and unstated objections to changing their ways of working or doing business; • thoughts and feelings about business performance, direction and shared values of the business and stakeholders • The information needed to review a business and how to obtain it • Ways to use established measures and diagnostic tools to evaluate business situations, including: <ul style="list-style-type: none"> • Business performance data analysis and performance measures (for example, benchmarking). • Qualitative and quantitative analytical and diagnostic techniques (for example, SWOT, PEST, five forces or variance analysis). • Market appraisal, pricing and evaluating the different types of products offered (product mix). • Evaluation of production processes and techniques. • Financial appraisal techniques. • Risk assessment techniques. • Analysis of business culture • Identification of stakeholders and their influence • Profiling of individuals' strengths, weaknesses and motivation • Common problems and opportunities small businesses (including structured business formats such as franchising, direct selling, licensing and distribution agreements) may face. • Ways to identify: <ul style="list-style-type: none"> • trends and developments that may affect the client's business (for example, consumer demand, new technology or government legislation). • Barriers or obstacles to improving performance (for example, personal, interpersonal issues, funding or skills). • which parts of a business would benefit from change • Ways to solve business problems, by: <ul style="list-style-type: none"> • identifying possible problems and opportunities; • monitoring and evaluating progress; and • evaluating the benefits and drawbacks of different decisions. • The most suitable options and the options most appropriate to specific issues. • How to challenge clients in overcoming obstacles and barriers to achievement. • How to support clients in dealing with problems and difficulties that may exist in achieving solutions. • How to define business objectives, actions, organisational structures, roles and responsibilities. • How to set practical, specific and ambitious personal and business objectives for the short-, medium- and longer term • How to improve competitiveness and the benefits and drawbacks of different kinds of competition • Cash flow forecasts and survival planning. • Profit and loss accounts, balance sheets and cash flow statements. • Development, presentation and use of business plans.

	<ul style="list-style-type: none"> • Sources of new opportunities (for example, networking, collaboration with other businesses or carrying out first hand research with their customers). • The benefits and drawbacks of different business models including franchising, direct selling, licensing and distribution agreements (either when replicating their business or purchasing a structured business format). • Business, financial and legal rules and methods. • The range of legal and governance structures available to small businesses
2	<ul style="list-style-type: none"> • The impact of change on an organisation • Ways to judge clients readiness and commitment to making changes • Methods to develop commitment to change including: <ul style="list-style-type: none"> • Evaluating them against personal and business objectives • Identifying the business and personal benefits • Resolving personal and interpersonal issues and habitual behaviour that are obstacles to change • Countering stated or unstated objections with facts and arguments • Resolving conflict between competing ideas • Identifying the urgency of changes needed • Ways to decide which changes should be made including: <ul style="list-style-type: none"> • Evaluating them against business and personal objectives • Evaluating the risks and benefits • Finding out what may be involved personally and in business terms • Forms of business plan that can be used to record and manage change
3	<ul style="list-style-type: none"> • Ways to enable clients to plan, set objectives and decide what is important • Resources that are needed to achieve desired results, such as: <ul style="list-style-type: none"> • Commitment of other people • Skills, • Knowledge • information • The stages in developing and implementing an action plan including: <ul style="list-style-type: none"> • setting short- and longer-term goals; • actions and timescales; • identifying what resources will be needed, where they will come from and how they will be used; • assigning roles and responsibilities; • managing risks; and • monitoring performance. • When plans need to be adapted. • Ways to engage clients with contingency planning and risk assessment. • Ways to identify stakeholders and other people who help develop or carry out the plan or whose support is needed • Methods of consulting with and getting buy in from stakeholders • Ways to achieve results through the guided actions of others



Title:	Working with Business Link brokerage clients	Section 4	
Learning outcomes The learner will	Assessment criteria The learner can (in an organisation with which the learner is familiar)		
1. Use their knowledge of small businesses in their interactions with clients.	1.1	Judge the strengths and weaknesses of different small business clients	
	1.2	Evaluate business problems and opportunities.	
2. Communicate effectively with their clients	2.1	Maintain protocols for communicating that clients find acceptable and that make best use of resources.	
3. Manage clients' expectations of confidentiality	3.1	Manage client confidentiality in accordance with the requirements of the Business Link brand and your organisation.	
Additional information about the unit			
Links to NOS: Based on Business Link Broker Standard units 1, 2 and 3			
Unit aim(s)			
To equip business advisers to work effectively with Business Link brokerage clients			

	Indicative content:
1	<ul style="list-style-type: none"> • Ways to judge the strengths and weaknesses of different types of small businesses, for example, by looking at: <ul style="list-style-type: none"> • The market sectors those businesses are in; • The businesses' potential for growth; • Their stage of growth; and • Their management abilities towards people, finance and physical resources. • Ways to help small businesses identify and build on the unique selling points of their business • Different support that might be needed by business start-ups and more established businesses. • What other individuals, agencies or organisations provide business support; the scope, benefits, limitations and costs of the support they provide; and referral processes. • The main issues that affect business start-ups and growing businesses. • What will help some small businesses succeed when others fail. • What outside factors are affecting small businesses, such as: <ul style="list-style-type: none"> • UK and European regulations; • Government projects; • Economic trends; • Industrial trends and developments; • Geographical features; • Political and social issues; and • Information and communications technology. • The major functions that are required in a small business, such as business planning, finance, management, personnel, production, operation, sales and marketing. • How business functions link to and support each other. • The challenge for small businesses in successfully managing the different functions. • Ethical and professional considerations. • Ways to evaluate business problems and opportunities • Ways to help clients make sense of the business analysis process and the results (for example, doing it themselves with feedback from you, using another staff member or external resource). • Ways to identify clients who are not eligible for the Business Link service they have requested and suitable constructive alternatives you can recommend.
2	<ul style="list-style-type: none"> • Effective ways to prepare for and hold meetings • Communication protocols that clients are likely to find acceptable. • A range of client-led consulting styles including acceptant, catalytic, confrontational and perspective and how to choose and use them.
3	<ul style="list-style-type: none"> • The limitations on client confidentiality • Ways to explain these limitations clearly to the client and obtain their consent. • The limitations of the service that you will be able to offer to clients who do not consent to the Business Link confidentiality procedures.



Title:	Providing a Business Link brokerage service	Section 5	
Learning outcomes The learner will	Assessment criteria The learner can (in an organisation with which the learner is familiar)		
1. Help clients choose and use business support.	1.1	Help clients select business support providers which best meet their needs	
	1.2	Help clients to fund their business support.	
2. Effectively manage a case load of clients.	2.1	Maintain contact with all clients in order to track emerging needs and update them with new opportunities that may be relevant to them	
	2.2	Manage a balanced portfolio of active clients with an appropriate rate of churn.	
3. Implement Business Link principles and practices.	3.1	Use internal processes and procedures effectively and consistency	
	3.2	Provide a service to clients that meets Business Link brand requirements.	
Additional information about the unit			
Links to NOS: Based on Business Link Broker Standard			
Unit aim(s)			
To equip business advisers and gateway staff with the skills to provide a Business Link brokerage service			

	Indicative content:
1	<ul style="list-style-type: none"> • The range of relevant internal and external business support services and how they can help to provide focussed and relevant support and expertise. • The various sources of information about suppliers offering business support services that you can help the client to access through the Business Link brand. • The procurement rules and brand values around impartiality and independence of advice and guidance. • The range of service providers who are able to meet the client’s requirements for business support services. • Appropriate methods for choosing and using suppliers • Ways to assist clients to specify their requirements for business support. • How to provide an effective brief to potential suppliers in order that comprehensive and realistic quotes can be obtained. • Ways to develop and use criteria for selecting suppliers that are most likely to provide clients with the service that they require and provide best value. • Ways to ensure the support programme meets the legislation, advisory regulations and organisational guidelines that apply to business support. • Ways to ensure that the responsibility for choosing and using suppliers is retained by the client. • The range of potential funding opportunities and methods for accessing and applying for these. • Criteria that have to be met if public funding is to be used. • The sources of finance most appropriate to clients’ needs.
2	<ul style="list-style-type: none"> • How a single point of contact improves their experience of business support. • How to ensure a portfolio of clients is consistent with the priorities and objectives of the regional economic strategy and your role. • Effective strategies for taking on new clients and exiting from clients who have completed their business support journey. • Ways to ensure that all clients in the portfolio are making appropriate business development progress. • Strategies to accelerate client progress or remove them from the portfolio if they are failing to make adequate progress. • Ways to identify and address difficulties in maintaining an effective portfolio. • The principles of relationship development and how good customer service principles can contribute to building long term client relationship. • How to keep up to date with new business support products and services under the Business Link brand and within the wider support network. • Good practice portfolio management techniques.
3	<ul style="list-style-type: none"> • Appropriate ways to use the customer relationship management system to; <ul style="list-style-type: none"> • Record management information on brokerage solutions • Research clients’ history • Record client progress • When national and regional policy objectives influence the type and nature of the support you can offer the client under the Business Link brand. • Ways to explain changes to the type and nature of support available constructively and positively to clients



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| <ul style="list-style-type: none">• Ways to maintain independence and impartiality and deliver targets for regional and national stakeholders only when you believe they are in the best interest of the client.• Business Link brand requirements for conduct and professionalism.• How to provide a service that is client focussed at all times. |
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