

Business Information

National Occupational Standards

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Contents

No.	NOS Title	Page No.
CFABI1	Deal with initial business information enquiries from clients and identify their needs	1
CFABI2	Research and provide clients with the business information they need	9
CFABI3	Contribute to administering and promoting business information services	15
CFABI4	Provide and maintain the materials needed to deliver business information	22
CFABI5	Develop networks to provide access to business information, support and resources	28
CFABI6	Evaluate the quality of your own practice in business information	33
CFABI7	Develop your own ability to provide business information	38
CFABI8	Develop your knowledge and experience of a small business and its core functions	44

CFABI1

Deal with initial business information enquiries from clients and identify their needs



Overview

This is about responding to enquiries from clients for business information, asking the right questions so that you can find out what they need, and presenting the information appropriately. It includes being able to build relationships with clients, whether you are dealing with them over the phone, by e-mail or face-to-face so that they gain confidence in the service you can provide.

CFABI1

Deal with initial business information enquiries from clients and identify their needs

Performance criteria

- You must be able to:*
- P1 deal with client enquiries efficiently and politely, in line with relevant guidelines for providing support services
 - P2 maintain contact and exchange information with clients through face-to-face meetings or by phone or e-mail
 - P3 encourage your clients to clearly explain what they need and to ask for more information and help, if and when they need it
 - P4 ask questions to that allow you to understand what your clients need, so that you can identify what business information or other support services may help them
 - P5 ask for advice and guidance when you are not confident in your understanding of the client's business needs
 - P6 manage client's expectations in responding to their information needs, in terms of potential benefits, limitations, timescales and any costs involved
 - P7 direct clients who need specialist information or advice to those qualified to provide such support, provide contact details, make introductions or appointments, where appropriate
 - P8 propose and promote services (including costs) that are likely to meet your clients' needs
 - P9 advise clients about any funding that they are eligible to claim for business support services
 - P10 make sure that your clients understand the scope of the services offered by your organisation
 - P11 keep up-to-date and accurate records of client contact at all stages of the process
 - P12 assure your clients of confidentiality at all times
 - P13 end contact with a client in a way that encourages them to contact you in the future

CFABI1

Deal with initial business information enquiries from clients and identify their needs

Knowledge and understanding

You need to know and understand:

Interpersonal and communication skills

- K1 how to use effective interpersonal and communication skills, including, when appropriate:
 - K1.1 dealing with clients with different backgrounds and cultures;
 - K1.2 listening fully and attentively;
 - K1.3 questioning and reflecting back;
 - K1.4 checking accuracy;
 - K1.5 summarising;
 - K1.6 respecting and acknowledging issues;
 - K1.7 interviewing, reviewing and deciding on needs;
 - K1.8 negotiation;
 - K1.9 giving, receiving and passing on constructive feedback;
 - K1.10 guaranteeing client confidentiality; and
 - K1.11 dealing with difficulties
- K2 the benefits and drawbacks of different kinds of communication in different circumstances (for example, face-to-face contact, phone, fax and e-mail)
- K3 how to deal with clients whose first language is not English
- K4 different ways that clients may react to and take in information
- K5 the importance of pacing information in a way that will aid understanding to suit the client's capacity to absorb it
- K6 why and when to check that the client is making sense of the information you are presenting

Client information needs

- K7 how to recognise the nature of the enquiry and why the client needs the information or product
- K8 what questioning techniques may be suited to the client's communication style and information needs
- K9 how to deal with an enquiry in a way that satisfies the client
- K10 the answers to frequently asked questions from clients
- K11 the client's personal and business objectives and needs
- K12 the client's business operations
- K13 how to investigate beyond the client's stated needs to explore what their real needs may be
- K14 how business needs may vary in terms of:
 - K14.1 size;
 - K14.2 stage of development;
 - K14.3 the industrial sector they operate in; and
 - K14.4 whether they are public, private or voluntary sector

CFABI1

Deal with initial business information enquiries from clients and identify their needs

- K15 how to identify whether a client's business information needs can be met by your organisation or by any other services
- K16 the limits of your own skills and knowledge
- K17 when and where to get any advice, if you do not understand the client's business
- K18 the importance of operating legally

Business information research skills

- K19 the advantages and disadvantages of different sources of information, including:
 - K19.1 local information;
 - K19.2 statistical information;
 - K19.3 market research information;
 - K19.4 in-house or online databases, business directories and guides;
 - K19.5 newspapers, periodicals and specialist business publications;
 - K19.6 information on companies and products;
 - K19.7 information from councils and government; and
 - K19.8 information about legislation (eg employment law, health and safety law, business taxation, environmental protection, intellectual property, international trade)
- K20 how to research different information systems (eg the internet, own organisation's information materials or another organisation's resources)
- K21 how to exploit the potential of computer and paper-based information systems
- K22 what format to use to present the results of the research (eg market or statistical information, abbreviations, use of the internet to locate information, business start up information, legislation and regulations)
- K23 how to present different types of business information so that it is clear and easy to follow for different audiences

Business support services

- K24 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)
- K25 roles and responsibilities within your organisation
- K26 the guidelines for providing support services set by your organisation or professional body about:
 - K26.1 maintaining confidentiality in different working environments;
 - K26.2 ethics, values and professional standards;
 - K26.3 equal opportunities, diversity and social inclusion;
 - K26.4 funding and other support available to the client;
 - K26.5 using information management systems;
 - K26.6 using invoicing systems, pricing and credit-control policies; and
 - K26.7 procedures for quality assurance and handling complaints

CFABI1

Deal with initial business information enquiries from clients and identify their needs

K27 the role of your organisation in developing competition among local businesses

Funding and resources

K28 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)

K29 how to co-ordinate support services that match different client needs

K30 the funding that is available and relevant to the client's needs

K31 the procedures of funding agencies

CFABI1

Deal with initial business information enquiries from clients and identify their needs

Additional Information

Behaviours

1. Appreciate how an organisation operates in different client sectors
2. Tailor your approach to align with the client's goals and circumstances
3. Respect the client's need for information, commitment and confidentiality
4. Deliver thoughts in straightforward terms, but maintain listener interest
5. Listen and respond effectively, and check understanding
6. Have a rigorous but impartial questioning style
7. Adapt your personal style to empathise with a whole range of clients.
8. Build and maintain rapport over sustained periods
9. Invite a two-way exchange of information and feedback with clients and others
10. Maintain an impartial approach by avoiding subjectivity or making assumptions
11. Persevere in trying to find the most appropriate information
12. Be patient when questioning clients and presenting information

Links to other NOS

There are other NOS suites which you may want to refer to if you would like to develop your knowledge and abilities to a greater depth in certain topics covered by the Business Information standards. For this unit they are:

Ento Advice and Guidance units:

1. AG1 Establish communication with clients for advice and guidance
2. AG2 Support clients to make use of the advice and guidance service
3. AG3 Develop interactions with advice and guidance clients
4. AG4 Interact with clients using a range of media
5. AG5.1 Assist clients to clarify their requirements

Skills CFA Business Administration units:

6. 105 Store and retrieve information
7. 209 Store, retrieve and archive information
8. 219 Use a telephone system

Institute of Customer Service Customer Service units:

9. 3 Communicate effectively with customers
10. 6 Recognise and deal with customer queries, requests and problems
11. 10 Promote additional services or products to customers
12. 15 Deal with customers in writing or using ICT
13. 16 Deal with customers face to face
14. 17 Deal with customers by telephone

Those in a supervisory role may wish to refer to the Managements Standards

CFABI1

Deal with initial business information enquiries from clients and identify their needs

Centre Management and Leadership unit:

15. E11 Communicate information and knowledge

CFABI1

Deal with initial business information enquiries from clients and identify their needs

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CFABI2

Research and provide clients with the business information they need



Overview

This is about undertaking research to provide clients with the business information they need. It includes identifying sources of information, analysing information and reporting the results of the research.

CFABI2

Research and provide clients with the business information they need

Performance criteria

- You must be able to:*
- P1 identify clearly the type and range of information required
 - P2 identify and evaluate the sources of information for their contribution to the research
 - P3 approach sources of information with a clear explanation of the purpose of the research
 - P4 ascertain clearly the procedures that are required to access the information
 - P5 specify clearly any risks to the sources of information from the research
 - P6 identify any problems with the collection of necessary information and take appropriate action to deal with them
 - P7 access the sources of information according to agreed procedures
 - P8 collect information in line with the requirements of the research
 - P9 apply information collection methods correctly and consistently
 - P10 ensure the analysis methods are appropriate to the information and the aims of the research
 - P11 analyse information accurately according to the appropriate methodology
 - P12 interpret and synthesise the results carefully, and draw suitable conclusions
 - P13 identify any unexpected results and suggest reasons for them
 - P14 present the results of the research in a manner appropriate to its aims and objectives
 - P15 acknowledge appropriately all sources of information
 - P16 review the progress and results of the research with the relevant people wherever possible
 - P17 protect confidential information in accordance with agreements and procedures
 - P18 evaluate the success of the research against the specified evaluation criteria
 - P19 record the collected information and the results of the research in the appropriate systems
 - P20 comply with all relevant legislation, codes of practice, guidelines, and ethical requirements

CFABI2

Research and provide clients with the business information they need

Knowledge and understanding

You need to know and understand:

Identify sources and availability of information

- K1 what types of information are required
- K2 what the potential sources of information are
- K3 how the sources of information have cooperated in the past
- K4 why it is important to be clear about the research being undertaken
- K5 what the access procedures for different types of information are
- K6 the rules of confidentiality relating to different types of information
- K7 what the different risks are that should be considered, and how to minimise their effects
- K8 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

Collect information to achieve research objectives

- K9 what the agreed procedures are for accessing information
- K10 which information collection procedures are required
- K11 why it is important to apply the collection methods correctly and consistently and the consequences of not doing so
- K12 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
- K13 what the systems are for recording information, the procedures relating to the use of these, and why it is important to use these systems

Analyse information collected from the research

- K14 which analysis methods could be used
- K15 what analysis methods have proved most useful in the past
- K16 how to use the analysis methods
- K17 why it is important to provide a rationale for the results
- K18 what types of result are expected and the possible reasons for unexpected results
- K19 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
- K20 who should be involved in reviewing the research

Report the results of the research

- K21 how to present different types of research results
- K22 who should be acknowledged in the research
- K23 who should be involved in reviewing the research

CFABI2

Research and provide clients with the business information they need

- K24 what types of information sources should be protected
- K25 what types of information might be confidential
- K26 what the criteria are for evaluating the success of the research
- K27 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

Comply with legislation and guidance

- K28 the relevant national, local, professional, and organisational requirements that relate to equal opportunities, discrimination, health and safety, security, confidentiality, and data protection
- K29 why it is important to comply with different requirements
- K30 what the consequences are of not complying with different requirements
- K31 how to obtain information on the requirements

CFABI2

Research and provide clients with the business information they need

Additional Information

Links to other NOS

There are other NOS suites which you may want to refer to if you would like to develop your knowledge and abilities to a greater depth in certain topics covered by the Business Information standards. Those in a supervisory role may wish to refer to the Managements Standards Centre Management and Leadership unit:

1. E11 Communicate information and knowledge:

CFABI2

Research and provide clients with the business information they need

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CFABI3

Contribute to administering and promoting business information services



Overview

This is about handling the day-to-day administration that is needed to enable an effective business information service to be provided to clients. This includes maintaining diaries, records of client contacts and follow-up. It also includes organising and cataloguing materials, and administering activities designed to promote and provide business support services and presenting the service.

CFABI3

Contribute to administering and promoting business information services

Performance criteria

- You must be able to:*
- P1 set-up and up-date client records in line with relevant legal requirements and organisation guidelines
 - P2 maintain complete, accurate and up-to-date records of client contacts and follow up
 - P3 use diary systems effectively to plan and manage your own and other colleague's activities to meet deadlines
 - P4 make sure that the necessary materials are available for the business information service to operate on a day-to-day basis
 - P5 prepare and supply materials needed to inform clients and others about the business support services offered by your organisation
 - P6 make sure that materials are organised in a way that that helps people access what they need
 - P7 plan and organise meetings or events that contribute to promoting and providing business support services
 - P8 contribute to presenting the business support service in a way that clearly explains and effectively promotes the benefits and activities offered
 - P9 make sure that your activities support and promote effective customer service

CFABI3

Contribute to administering and promoting business information services

Knowledge and understanding

You need to know and understand:

Communication and interpersonal skills

- K1 how to listen and question
- K2 how to summarise and exchange information
- K3 how to interview, review and decide on needs
- K4 how to negotiate, challenge and deal with difficulties
- K5 your colleagues' and contacts' interests, skills and preferred ways of working with you

Client records

- K6 what and when information is recorded about client contacts and follow up
- K7 how to set-up, maintain and monitor records using your organisation's client relationship management (CRM) system
- K8 the legislation and organisational guidelines relevant to client records (such as about data protection, freedom of information, confidentiality)

Diary systems

- K9 why it is important to use diary systems to plan and co-ordinate activities and resources
- K10 how to make diary entries using your organisation's diary system
- K11 how to prioritise and balance competing requirements and resources
- K12 how to negotiate and agree any changes to arrangements and make sure that all those involved have been informed
- K13 the types of security and confidentiality issues relevant to diary systems and how to manage them

Materials

- K14 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)
- K15 how materials are procured within the available budget
- K16 the different types of information materials that need to be organised
- K17 why it is important to store information securely
- K18 how to layout and structure information materials so that they can be accessed easily by users
- K19 how to organise and present indexes or catalogues so that users can easily locate information materials
- K20 how to use computer and machine-based information storage systems
- K21 how to handle information materials in line with health and safety guidelines

CFABI3

Contribute to administering and promoting business information services

Meetings or events

- K22 the purpose and resources needed in advance and on the day (such as budget, venue, equipment, catering, information)
- K23 the role and responsibilities of those involved, including any health, safety and security requirements that need to be taken into account
- K24 who will attend, when and how they will be invited, and any special requirements they may have
- K25 how to present business support services effectively to different audiences
- K26 the types of problems that may occur during the event or meeting and how to solve these
- K27 whether any records will be kept or circulated afterwards, by whom and how

Customer service

- K28 what is meant by the term 'customer' and who the customers are for your team and organisation
- K29 why effective and efficient customer service, and continuous improvement, is important
- K30 the quality standards that apply to customer service
- K31 how to set and meet timescales and quality standards for your customers
- K32 why it is important to monitor customer satisfaction and how to do so
- K33 the types of problems that customers may experience and how to solve them

CFABI3

Contribute to administering and promoting business information services

Additional Information

Behaviours

1. Gain respect by operating in a professional and credible manner
2. Engender co-operation by considering the perspective of others
3. Handle disagreements or resistance constructively and fairly
4. Confidence about your own knowledge and ability
5. Think strategically, take a holistic view of the way forward
6. Strive to add value by achieving results in the best way
7. Develop yourself to improve performance
8. Remain positive and maintain effort despite setbacks, changes or ambiguities
9. Achieve results through the guided actions of others
10. Prioritise and schedule to ensure optimum use of time and resource
11. Be sufficiently organised and flexible to switch between several ongoing tasks
12. Recognise when plans need to be adapted and act accordingly
13. Invite a two-way exchange of information and feedback with others

Links to other NOS

There are other NOS suites which you may want to refer to if you would like to develop your knowledge and abilities to a greater depth in certain topics covered by the Business Information standards. For this unit they are:

Skills CFA Business Administration units:

1. 105 Store and retrieve information
2. 204 Manage diary systems
3. 209 Store, retrieve and archive information
4. 211 Organise and support meetings
5. 224 Produce documents
6. 304 Procure products and services
7. 311 Plan, organise and support meetings
8. 313 Organise and coordinate events
9. 412 Chair meetings

Institute of Customer Service Customer Service units:

10. 1 Prepare yourself to deliver good customer service
11. 2a Maintain a positive and customer-friendly attitude
12. 2b Adapt your behaviour to make a good customer service impression
13. 4 Do your job in a customer-friendly way
14. 5 Provide customer service within the rules
15. 6 Recognise and deal with customer queries, requests and problems
16. 7 Understand customer service to improve service delivery
17. 8 Know the rules to follow when developing customer service
18. 9 Give customers a positive impression of yourself and your organisation
19. 12 Live up to the customer service promise

CFABI3

Contribute to administering and promoting business information services

- 20. 13 Make customer service personal
- 21. 21 Deliver reliable customer service
- 22. 22 Deliver customer service on your customer's premises
- 23. 29 Evaluate the quality of customer service
- 24. 30 Build and maintain effective customer relations
- 25. 37 Support customer service improvements

Those in a supervisory role may wish to refer to the Managements Standards Centre Management and Leadership units:

- 26. D11. Lead meetings
- 27. D12. Participate in meetings

CFABI3

Contribute to administering and promoting business information services

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CFABI4

Provide and maintain the materials needed to deliver business information



Overview

This is about monitoring, obtaining and improving the materials needed to provide an up-to-date business information service. The materials may include paper-based reference materials such as books, periodicals, leaflets as well as multi-media materials, such as web-pages, DVD and CD ROMs.

This unit is imported and tailored from Ento's National Occupational Standards for Advice and Guidance unit *AG 21 Provide and maintain information materials for use in the service.*

CFABI4

Provide and maintain the materials needed to deliver business information

Performance criteria

- You must be able to:*
- P1 review the information materials currently used by the service and its clients
 - P2 identify clearly the way the information materials are used
 - P3 consult with all relevant sources on the effectiveness of the information materials currently used
 - P4 explore the future requirements for information materials
 - P5 identify any trends or developments in the dissemination of information materials
 - P6 identify the resources available for obtaining the information materials
 - P7 specify clearly the information materials that should be obtained
 - P8 determine suitable methods to obtain the information materials
 - P9 comply with procedures for accessing and obtaining information materials
 - P10 agree realistic time scales and resources for obtaining the information materials
 - P11 obtain suitable information materials that contribute to the service
 - P12 identify any problems with obtaining the information materials
 - P13 record and store the information materials in the appropriate systems
 - P14 maintain sufficient sources of freely available information materials to meet the requirements of clients
 - P15 protect information sources effectively from damage and inappropriate use or alteration
 - P16 identify any aspects of the information materials that could be improved
 - P17 assess the overall effectiveness of the information materials against the agreed evaluation criteria
 - P18 identify the most appropriate methods for improving the information materials
 - P19 identify the resources required to implement the improvements
 - P20 present a clear rationale for the improvements and support it with suitable evidence
 - P21 consult with all relevant people on the improvements
 - P22 record the results of the consultation in the appropriate systems
 - P23 ensure the information materials and any proposed improvements comply with legislation, codes of practice, guidelines, and ethical requirements

CFABI4

Provide and maintain the materials needed to deliver business information

Knowledge and understanding

You need to know and understand:

Identify the requirements for information materials in the service

- K1 what types of information materials are used
- K2 which aspects of the service they cover
- K3 who the clients are who use information materials
- K4 what format the information materials are in
- K5 how many people use the information materials
- K6 who can provide information on the use of the information materials
- K7 which potential clients would use the information materials
- K8 what the potential future requirements of the information materials might be
- K9 what the seasonal or other variations in demand for information materials might be
- K10 who can provide information on future requirements
- K11 what types of trends or developments might occur
- K12 how to assess the impact of information and communication technologies
- K13 which resources might be available
- K14 what the constraints of the resources are
- K15 who requires information on the information materials being obtained

Obtain information materials for use in the service

- K16 what methods could be available for obtaining information materials
- K17 what the organisational guidelines and procedures are for accessing and obtaining information materials
- K18 which factors might affect the time scales for obtaining information materials
- K19 which resources are required for obtaining information materials
- K20 how to assess the information materials' contribution to the service
- K21 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
- K22 what the systems for recording and storing information materials are, the procedures for using these and why it is important to use the systems

Maintain and improve the use of information materials in the service

- K23 how often the information materials/ sources should be updated
- K24 who should be involved in reviewing the information materials and sources
- K25 how to protect different types and formats of information materials and

CFABI4

Provide and maintain the materials needed to deliver business information

sources

- K26 the potential types of damage which could occur to information materials
- K27 how information sources could be inappropriately used or altered
- K28 what information can be collected on the effectiveness of the information materials
- K29 which aspects of the information materials have the potential to be improved
- K30 the effectiveness of the information materials
- K31 what the evaluation criteria are for the effectiveness of the information materials and sources
- K32 how to improve different types of information materials
- K33 what types of improvement could be suggested
- K34 which resources are required to implement different types of improvement
- K35 why it is important to provide a clear rationale for improvements
- K36 what types of evidence may be necessary to support the rationale for improvements
- K37 who should be consulted on improvements to information materials
- K38 what the systems are for recording evaluations, the procedures relating to the use of these and why is it important to use the systems

Comply with legislation and guidance

- K39 the relevant national, local, professional, and organisational requirements that relate to equal opportunities, discrimination, health and safety, security, confidentiality, and data protection
- K40 why it is important to comply with different requirements
- K41 what the consequences are of not complying with different requirements
- K42 how to obtain information on the requirements

CFABI4

Provide and maintain the materials needed to deliver business information

Additional Information

Links to other NOS

There are other NOS suites which you may want to refer to if you would like to develop your knowledge and abilities to a greater depth in certain topics covered by the Business Information standards. Those in a supervisory role may wish to refer to the Managements Standards Centre Management and Leadership unit:

1. E8. Manage physical resources

CFABI4

Provide and maintain the materials needed to deliver business information

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CFABI5

Develop networks to provide access to business information, support and resources



Overview

This is about the development and use of personal contacts and networks to help you provide a wide range of information, support and resources that are likely to be relevant to different clients' business needs. For example, getting advice from experts, or putting people in touch with other businesses that have had similar concerns. It includes considering how you contribute to the networks to make you a valued person to work with.

CFABI5

Develop networks to provide access to business information, support and resources

Performance criteria

- You must be able to:*
- P1 actively seek opportunities to make new contacts using formal and informal techniques
 - P2 contribute to your network contacts in a way that builds their confidence in you
 - P3 ask contacts for information, advice and further contacts that will benefit your clients
 - P4 make sure your network contacts understand your needs for information, resources and further contacts
 - P5 evaluate how new contacts can add value to the service provided to particular clients now and in the future
 - P6 make sure that your relationships with contacts follow any guidelines set by your organisation
 - P7 establish boundaries of confidentiality between yourself and members of your personal networks
 - P8 encourage clients to use your contacts and networks to increase the business opportunities open to them
 - P9 keep up to date with your networks and contacts, and identify improved ways of using them
 - P10 use business contacts to improve the quality of the business information service you provide
 - P11 monitor the information and support given by other organisations to see if they can improve the business support services you provide
 - P12 identify ways to improve the quality of information you get from contacts and network organisations
 - P13 review the opportunities, costs and benefits of new contacts and networks

CFABI5

Develop networks to provide access to business information, support and resources

Knowledge and understanding

You need to know and understand:

Communication and interpersonal skills

- K1 how to listen and question
- K2 how to exchange information
- K3 the importance of maintaining client confidentiality
- K4 your colleagues' and contacts' interests, skills and preferred ways of working with you

Networking

- K5 how to build personal contacts and form networks:
 - K5.1 formally (for example, by joining specialist groups or associations, business networking organisations or by contact with other local, regional, national or international business support services); and
 - K5.2 informally (for example, at a conference or through an on-line chat room)
- K6 how to identify where local networking opportunities exist and where there are gaps
- K7 how to identify people and organisations that have the potential to benefit you and your clients
- K8 how to maintain network contacts (for example, by informing them of business opportunities, referring them to other contacts, exchanging business information and ideas)

Providing support services

- K9 the guidelines for providing support services set by your organisation or professional body about:
 - K9.1 maintaining confidentiality in different working environments;
 - K9.2 ethics, values and professional standards;
 - K9.3 equal opportunities, diversity and social inclusion; and
 - K9.4 using information management systems

Evaluating networks

- K10 how to formally and informally monitor your own personal conduct
- K11 how to compare the service provided by others
- K12 the way your organisation networks with other organisations

CFABI5

Develop networks to provide access to business information, support and resources

Additional Information

Behaviours

1. Engender co-operation by considering the perspective of others
2. Build and maintain rapport over sustained periods
3. Invite a two-way exchange of information and feedback with others

Links to other NOS

There are other NOS suites which you may want to refer to if you would like to develop your knowledge and abilities to a greater depth in certain topics covered by the Business Information standards. For this unit they are:

Ento Advice and Guidance units:

1. AG18 Operate within networks

Those in a supervisory role may wish to refer to the Managements Standards Centre Management and Leadership unit:

2. A3. Develop your personal networks

CFABI5

Develop networks to provide access to business information, support and resources

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CFABI6

Evaluate the quality of your own practice in business information



Overview

This is about disciplined reflecting on and evaluating your practice to make sure that you are providing effective and appropriate business information to clients. It is also about checking that your practice meets professional standards and identifying any improvements or developments you could make.

CFABI6

Evaluate the quality of your own practice in business information

Performance criteria

- You must be able to:*
- P1 agree with clients that the business information you deliver to them is the service you agreed to deliver
 - P2 alter your practice to take account of any changes in:
 - P2.1 your relationship with the client;
 - P2.2 their business;
 - P2.3 the way your service operates; and
 - P2.4 business information
 - P3 describe and analyse the following, using valid evidence, at key points:
 - P3.1 your methodology;
 - P3.2 the relevance of the information you provided to the client and their business;
 - P3.3 improvements that need to be made, either by yourself or through involving others; and
 - P3.4 any problems that need to be resolved
 - P4 monitor your practice regularly to make sure that it:
 - P4.1 meets or exceeds acceptable professional standards;
 - P4.2 meets all relevant regulations and organisational guidelines;
and
 - P4.3 is always ethical and professional towards clients
 - P5 get regular and useful feedback on your performance from others who are in a good position to judge it and provide you with objective and valid feedback
 - P6 identify improvements you could make to your practice with current and future clients

CFABI6

Evaluate the quality of your own practice in business information

Knowledge and understanding

You need to know and understand:

Performance monitoring techniques

- K1 how to apply effective informal and formal ways of regularly and fairly monitoring the progress and quality of your own practice against the standards or level of expected performance
- K2 the reasons for monitoring your own performance
- K3 the importance of establishing and applying valid and appropriate measures for evaluating your own performance
- K4 the limitations of self-appraisal
- K5 where and how to get constructive feedback on your performance from others (for example, through a reflective practice group or learning set, through professional supervision)
- K6 how the type of client and their business needs can affect your performance

Organisational factors

- K7 the performance goals set by your organisation or professional body
- K8 the guidelines for evaluating services set by your organisation or professional body, about:
 - K8.1 the conditions and measures of economy, efficiency, effectiveness, value for money and quality;
 - K8.2 the effect of financial and time limits on services; and
 - K8.3 any local or regional priorities and problems

CFABI6

Evaluate the quality of your own practice in business information

Additional Information

Behaviours

1. Respect the client's need for information, commitment and confidentiality
2. Prioritise and schedule to ensure optimum use of time and resource
3. Strive to add value by achieving results in the best way
4. Be committed to developing yourself to improve performance

Links to other NOS

There are other NOS suites which you may want to refer to if you would like to develop your knowledge and abilities to a greater depth in certain topics covered by the Business Information standards. For this unit they are:

Ento Advice and Guidance units:

1. AG15.1 Assess own contribution to the work of the service
2. AG16.1 Evaluate own practice
3. AG16.3 Operate within an agreed ethical code of practice

Those in a supervisory role may wish to refer to the Managements Standards Centre Management and Leadership units:

4. A1. Manage your own resources
5. A2. Manage your own resources and professional development

CFABI6

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CFABI7

Develop your own ability to provide business information



Overview

This is about developing your performance, in terms of your skills in providing business information to clients. The way that business information is provided can take different forms. Your practice may be focused in a particular area of business information or be more general. Whatever the limits of your current practice your aim should be to continuously develop your skills in providing business information. You should look at this from a personal, career point of view and take account of the needs of the organisation for which you work

CFABI7

Develop your own ability to provide business information

Performance criteria

- You must be able to:*
- P1 evaluate, at appropriate intervals, the requirements of your professional role, taking account of the expectations and objectives of your organisation
 - P2 maintain a level of knowledge and understanding that meets or exceeds market expectations about:
 - P2.1 business practice for small businesses;
 - P2.2 the range of business information and support that is available for typical problems in each key area;
 - P2.3 trends, opportunities and developments in business practice that may affect small businesses; and
 - P2.4 developments in business information practice that may affect the support you and your service provide
 - P2.5 use of information and communications technology
 - P3 change the way you work in line with any changes in business practice and how business information is provided
 - P4 obtain the best available information, given the time and cost available
 - P5 use feedback from clients, contacts and colleagues about your performance to identify any gaps between the current and future requirements of your professional role and your current skills, knowledge and understanding
 - P6 adopt a reflective and evaluative approach to your practice, with reference to your own objectives and recognised professional standards
 - P7 plan your own training and development in line with your organisation's objectives and recognised continuing professional development (CPD)
 - P8 update your personal development plan to include new aims or achievements

CFABI7

Develop your own ability to provide business information

Knowledge and understanding

You need to know and understand:

Ethical and professional considerations

- K1 You need to know and follow any guidelines provided by your organisation or professional body for business information services, about:
 - K1.1 ethics, values and standards of good practice; and
 - K1.2 client service and confidentiality

Personal action planning

- K2 how to evaluate the current requirements of your work role and how the requirements may evolve in the future
- K3 how to identify development needs to address any identified gaps between the requirements of your practice and your current knowledge, understanding and skills
- K4 how to improve your understanding of business practice generally, or in particular areas
- K5 how to set objectives which are SMART (Specific, Measurable, Achievable, Realistic and Time-bound)
- K6 how to plan actions
- K7 the principles that underpin professional development
- K8 the reasons for continuing professional development (CPD)
- K9 your strengths and weaknesses
- K10 your values and career and personal goals and how to relate them to your job role and professional development
- K11 what an effective development plan should contain and the length of time that it should cover
- K12 the learning style(s) which work(s) best for you (e.g. Kolb experiential model; auditory, visual, tactile/kinaesthetic; collaborative/activist, individual/reflective, theory-based/theorist or practice-led/pragmatist)
- K13 how to update work objectives and development plans in the light of performance, feedback received, any development activities undertaken and any wider changes
- K14 the way your organisation works (including resources, objectives, targets and training and development budget)
- K15 the objectives of your organisation for personal development (for example, opportunities, costs, timescales and targets and an annual personal development plan)

Improving your performance

- K16 the standards of performance set by your organisation or professional body
- K17 how to evaluate your performance against the requirements of your work-role

CFABI7

Develop your own ability to provide business information

- K18 how to identify and use good sources of feedback on your performance
- K19 how to monitor the quality of your work and your progress against requirements and plans
- K20 how to develop your knowledge about and experience of providing business support
- K21 the advantages and disadvantages of different types of development activities you could use (for example, attending conferences, workshops or master classes, undertaking work placements or joining specialist groups, using advice from mentors or seeking more opportunity to practise)
- K22 whether and how development activities have contributed to your performance

CFABI7

Develop your own ability to provide business information

Additional Information

Behaviours

1. Invite a two-way exchange of information and feedback with others
2. Develop yourself to improve performance

Links to other NOS

There are other NOS suites which you may want to refer to if you would like to develop your knowledge and abilities to a greater depth in certain topics covered by the Business Information standards. For this unit they are:

Ento Advice and Guidance units:

1. AG15.2 Develop oneself to achieve work requirements
2. AG16.2 Ensure continuing self-development

Those in a supervisory role may wish to refer to the Managements Standards Centre Management and Leadership units:

3. A1. Manage your own resources
4. A3. Develop your personal networks

CFABI7

Develop your own ability to provide business information

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CFABI8

Develop your knowledge and experience of a small business and its core functions



Overview

To be a good provider of business information you need to have an awareness of the broad range of abilities that cover the essential areas of business. This includes finance, marketing, sales, and customer service and how they link to and support each other. You also need to appreciate the competing demands, pressures, and motivations that face the entrepreneur. This standard is a tailored version of Standard 5 in the *Skills CFA Introduction to Business Support suite of standards*.

CFABI8

Develop your knowledge and experience of a small business and its core functions

Performance criteria

You must be able to:

Finances

- P1 working out financial requirements (for example forecasting resource requirements)
- P2 sourcing of funding and what is needed to secure that funding
- P3 planning, monitoring and recording the cash flow in and out of a business, venture, or project
- P4 opening and managing a bank account
- P5 understanding financial accounts
- P6 basic accounting terms and practices, and the basic rules regarding business taxation

You must be able to:

Marketing, sales and customer service

- P7 conducting market research (for example to assess market conditions, to estimate potential customer base, and to identify competition)
- P8 understanding the customers needs
- P9 delivering a good customer service and how you can measure and monitor it
- P10 understanding terms of business
- P11 basic marketing and sales techniques (for example, advertising, promotion, pricing) and tools (for example, websites, mail shots, direct selling)

You must be able to:

Small business experience

- P12 the emotional investment entrepreneurs make in their businesses
- P13 the major functions needed in a small business and how they link to and support each other
- P14 what it takes to successfully start and run a small business
- P15 the competing demands and pressures of running a small business (for example, cash management, the personal nature of people management and relying on a small customer base)
- P16 the diverse capabilities required of entrepreneurs (for example, financial management, business acumen, and human resource skills)
- P17 the need for entrepreneurs to take risks
- P18 the recognition that running a business takes a lot of time, energy and commitment when and how to apply the principles of running a small business in practice

CFABI8

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