

Management and Business Consultancy

National Occupational Standards

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CFAMBCA1

Establish and develop relationships with prospective clients



Overview

This standard describes the sales process leading to securing contracts to deliver consultancy services. It covers identifying prospective clients, understanding their needs and how your services can meet their needs, preparing and presenting proposals and negotiating the details of the contract to supply services.

It is for consultants, whatever profession or sector they are working in, who identify and develop new business as part of their role.

CFAMBCA1

Establish and develop relationships with prospective clients

Performance criteria

- You must be able to:*
- P1 respond positively and in a timely way to enquiries about your services
 - P2 identify organisations that could benefit from your services
 - P3 undertake background research to identify and evaluate:
 - P3.1 the nature of the organisation, its activities and position in its environment
 - P3.2 key decision-makers and influencers within the organisation
 - P3.3 the organisation's needs that could be addressed by your services
 - P3.4 the benefits to both parties of providing services to the organisation
 - P3.5 the values of the organisation and how well these fit with your values and approach
 - P3.6 any risks involved in working with the organisation and how these can be mitigated
 - P4 create opportunities to establish relationships with key decision-makers and influencers
 - P5 use opportunities to gain a better understanding of the organisation's needs and show key decision-makers and influencers how your services can address these needs
 - P6 build the confidence of key decision-makers and influencers by showing how your services have addressed relevant needs in other organisations
 - P7 create opportunities to develop and present proposals to deliver services to the organisation, highlighting the benefits of your approach and its advantages over alternative approaches
 - P8 anticipate and respond effectively to questions and objections raised by key decision-makers and influencers
 - P9 clarify the detail of the objectives to be achieved and negotiate the services to be delivered and the terms of business
 - P10 agree a contract for the delivery of services that meets the requirements of both parties and complies with relevant legislation

CFAMBCA1

Establish and develop relationships with prospective clients

Knowledge and understanding

You need to know and understand:

Principles, methods, tools and techniques relating to:

- K1 building consensus
- K2 communication
- K3 developing proposals
- K4 effective meetings
- K5 establishing, developing and sustaining working relationships
- K6 facilitation
- K7 identifying stakeholders and their diverse interests, needs, abilities and preferences
- K8 influencing
- K9 making presentations
- K10 negotiation
- K11 networking
- K12 promoting your services
- K13 research and investigation

Industry/sector specific knowledge and understanding

- K14 relevant industry/sector specific legal, regulatory, professional and ethical requirements

Context specific knowledge and understanding

- K15 key political, economic, social, technological, legal and environmental factors
- K16 knowledge and information on trends and developments in your professional/specialist/technical area
- K17 knowledge and understanding of the type and stage of growth of the organisation you are working with
- K18 relevant policies, procedures and requirements of your organisation
- K19 your own knowledge, skills and competence and the limits of these

CFAMBCA1

Establish and develop relationships with prospective clients

Additional Information

Behaviours

1. Adopt communication media and styles appropriate to people and situations
2. Present information clearly, concisely, accurately and in ways that promote
3. Use facts and evidence to build clients' confidence in you and your services
4. Reflect regularly on own and others' experiences, and use these to inform future actions
5. Seek out and act on new opportunities
6. Comply with legal requirements, industry regulations, organisational policies and professional codes
7. Act within the limits of your authority and competence
8. Seek to understand people's needs and motivations
9. Present self positively to others
10. Identify clearly the value and benefits to people of a proposed course of action
11. Deploy a range of legitimate strategies and tactics to influence people
12. Show sensitivity to internal and external politics that impact on your own area of work
13. Create opportunities to establish mutually beneficial relationships
14. Clarify own and others' expectations of relationships and develop shared understanding
15. Identify key stakeholders and their interests
16. Take opportunities when they arise to achieve longer-term aims

Links to other NOS

It links closely with D3 Develop your professional networks, which is part of the process of identifying prospective clients, and A2 Develop and Sustain relationships with clients, which describes the post-contract ongoing relationship with clients, including winning follow-on and repeat business

CFAMBCA1

Establish and develop relationships with prospective clients

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Validity	Current
Status	Original
Originating organisation	MSC
Original URN	CFAMBCA1
Relevant occupations	Business, Administration and Law; Arts, Media and Publishing; Corporate Managers and Senior Officials; Managers and Proprietors in Hospitality ; Social sciences; Education and training; Preparation for life and work; Business management; Marketing and sales; Production Managers; Functional Managers; Financial Institution and Office Manager; Managers in Distribution, Storage and Retail; Managers and Proprietors In Other Services; Health Associate Professionals; Media Associate Professionals; Communications; General; Legal Associate Professionals; Business and Finance Associate Professionals; Public Service and Other Associate Professionals
Suite	Management and Business Consultancy NOS 2009; NOS Suite for Management and Business Consultancy
Key words	establish, understand, develop, relationships, clients

CFAMBCA2

Develop and sustain relationships with clients



Overview

This standard covers the relationship between the consultant and the client – the key contact within the client organisation. It involves the interpersonal skills of getting to know each other and building rapport, trust and confidence as well as process skills of ensuring regular communication, reporting and recording. This standard covers the whole period from agreement of the contract to supply consultancy services (which is dealt with in *A1 Establish and develop relationships with prospective clients*) through to completion of the assignment. Evaluation, together with the client, of the work carried out and exploration of follow-on or repeat consultancy opportunities are also covered by this standard.

It is for consultants, whatever profession or sector they are working in and whether they work as external or internal consultants.

CFAMBCA2

Develop and sustain relationships with clients

Performance criteria

- You must be able to:*
- P1 work with the client to develop a good understanding of the scope of the support, advice and expertise you are able to provide within the terms of your contract with them
 - P2 establish with the client their overall expectations of the nature of the relationship and your respective roles
 - P3 develop a good understanding of the client's personality, competence, organisational role and level of authority and evaluate the impact of these on your relationship and the assignment
 - P4 recognise when there are conflicts of interest or of personality between yourself and the client and propose appropriate solutions for addressing these effectively
 - P5 agree the purpose, format and timing of interactions with the client
 - P6 agree which members of the client's organisation you are to interact with, the purpose, format and timing of these interactions and the nature of involvement of the client
 - P7 develop the client's trust and confidence in you through the delivery of quality services in line with your contract with them, keeping them informed of progress and providing advance warning of any problems or threats
 - P8 review the progress of work with the client at agreed times, discussing any problems, threats or concerns and agreeing how to address these
 - P9 maintain the confidentiality of the client organisation's data and respect their intellectual property
 - P10 evaluate openly and frankly with the client your respective perceptions of the work carried out, the objectives achieved and the quality of your relationship
 - P11 explore with the client further opportunities to meet identified needs and agree any future actions
 - P12 maintain accurate and agreed records of interactions with the client

CFAMBCA2

Develop and sustain relationships with clients

Knowledge and understanding

You need to know and understand:

Principles, methods, tools and techniques relating to:

- K1 building consensus
- K2 communication
- K3 establishing, developing and sustaining working relationships
- K4 evaluation
- K5 facilitation
- K6 information management and confidentiality
- K7 promoting your services
- K8 providing feedback
- K9 quality assurance and continuous improvement
- K10 record-keeping

Industry/sector specific knowledge and understanding

- K11 relevant industry/sector specific legal, regulatory, professional and ethical requirements

Context specific knowledge and understanding

- K12 key political, economic, social, technological, legal and environmental factors
- K13 knowledge and information on trends and developments in your professional/specialist/technical area
- K14 knowledge and understanding of the type and stage of growth of the organisation you are working with
- K15 relevant policies, procedures and requirements of your organisation
- K16 your own knowledge, skills and competence and the limits of these

CFAMBCA2

Develop and sustain relationships with clients

Additional Information

Behaviours

1. Keep people informed of plans and developments
2. Use facts and evidence to build client's confidence in you and your services
3. Adapt your approach according to client's personality, role and level of competence and authority
4. Use appropriate facilitation principles, methods, tools and techniques effectively
5. Encourage and welcome feedback from others and use this feedback constructively
6. Clearly state what is required of others and hold them to account.
7. Keep confidential information secure
8. Present self positively to others
9. Create a sense of common purpose
10. Work to develop an atmosphere of professionalism, mutual support and respect
11. Clarify own and others' expectations of relationships and develop shared understanding
12. Model behaviour that shows respect, helpfulness and co-operation.
13. Keep promises and honour commitments
14. Accept feedback from others without becoming defensive
15. Take opportunities when they arise to achieve longer-term aims

Links to other NOS

It links closely with A1 Establish and Develop relationships with prospective clients, which is about securing contracts with clients in the first place

CFAMBCA2

Develop and sustain relationships with clients

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Originating organisation MSC

Original URN CFAMBCA2

Relevant occupations Business, Administration and Law; Professional Occupations; Managers and Senior Officials; Information and Communication Technology; Associate Professionals and Technical Occupations; Preparation for life and work; Foundations for learning and life; Preparation for work; Business management; Marketing and sales; Communications; General; Business and Finance Associate Professionals

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

Key words develop, sustain, relationships, clients

CFAMBCA3

Develop and sustain relationships with colleagues and stakeholders



Overview

This standard is about developing and sustaining productive working relationships with colleagues and stakeholders. 'Colleagues' are people you are expected to work with, whether they are in a similar position or in other positions in terms of level of responsibility and authority. They include people in your organisation and people you work with in other organisations.

'Stakeholders' are individuals or organisations that have a material, legal or political interest in or who may be affected by the activities and performance of your organisation or the client organisation. They include people both within the client organisation and external stakeholders, such as the client organisation's strategic partners, clients and suppliers. The standard involves being aware of the roles, responsibilities, interests and concerns of colleagues and stakeholders and working with and supporting them in various ways. The need to monitor and review the effectiveness of working relationships with colleagues and stakeholders is also a key requirement of this standard.

It is for all consultants, whatever profession or sector they are working in and whether they work as external or internal consultants.

CFAMBCA3

Develop and sustain relationships with colleagues and stakeholders

Performance criteria

- You must be able to:*
- P1 identify stakeholders and their potential impact on the activities and performance of your organisation or your client's organisation
 - P2 establish working relationships with relevant colleagues and stakeholders
 - P3 recognise and respect the roles, responsibilities, interests and concerns of colleagues and stakeholders
 - P4 provide colleagues and stakeholders with appropriate information to enable them to perform effectively
 - P5 consult colleagues and stakeholders in relation to key decisions and activities and take account of their views, including their priorities, expectations and attitudes to potential risks
 - P6 fulfil agreements made with colleagues and stakeholders and keep them informed
 - P7 advise colleagues and stakeholders promptly of any significant difficulties or where it will be impossible to fulfil agreements
 - P8 identify and sort out conflicts of interest and disagreements with colleagues and stakeholders in ways that minimise damage to work and activities and to the individuals and organisations involved
 - P9 monitor and review the effectiveness of working relationships with colleagues and stakeholders, seeking and providing feedback, in order to identify areas for improvement
 - P10 monitor wider developments in order to identify issues of potential interest or concern to stakeholders in the future and to identify new stakeholders

CFAMBCA3

Develop and sustain relationships with colleagues and stakeholders

Knowledge and understanding

You need to know and understand:

Principles, methods, tools and techniques relating to:

- K1 communication
- K2 conflict management
- K3 developing an atmosphere of professionalism and mutual respect
- K4 establishing, developing and sustaining working relationships
- K5 evaluation
- K6 identifying stakeholders and their diverse interests, needs, abilities and preferences
- K7 information management and confidentiality
- K8 providing feedback

Industry/sector specific knowledge and understanding

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

Context specific knowledge and understanding

- K11 key political, economic, social, technological, legal and environmental factors
- K12 knowledge and information on trends and developments in your professional/specialist/technical area
- K13 knowledge and understanding of the type and stage of growth of the organisation you are working with
- K14 relevant policies, procedures and requirements of your organisation
- K15 relevant policies, procedures and requirements of the client organisation
- K16 your own knowledge, skills and competence and the limits of these

CFAMBCA3

Develop and sustain relationships with colleagues and stakeholders

Additional Information

Behaviours

1. Adopt communication media and styles appropriate to people and situations
2. Present information clearly, concisely, accurately and in ways that promote
3. Show respect for the views and actions of others
4. Comply with legal requirements, industry regulations, organisational policies and professional codes
5. Seek to understand people's needs and motivations
6. Work towards win-win solutions
7. Create a sense of common purpose
8. Show sensitivity to internal and external politics that impact on your own area of work
9. Work to develop an atmosphere of professionalism, mutual support and respect
10. Keep promises and honour commitments
11. Consider the impact of your own actions on others

Links to other NOS

This standard links closely with A2 Develop and sustain relationships with clients and D3 Develop your professional networks. This standard is based on D2 Develop productive working relationships with colleagues and stakeholders from the Management and Leadership standards, and is designed to provide full credit transfer.

CFAMBCA3

Develop and sustain relationships with colleagues and stakeholders

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Suite	Management and Business Consultancy NOS 2009; NOS Suite for Management and Business Consultancy;
Key words	develop, sustain, relationships, clients, stakeholders

CFAMBCB1

Work with the client to understand their circumstances, problems and opportunities



Overview

This standard is about helping the client and stakeholders within the client's organisation to understand their situation and to define more clearly the problem or opportunity they are trying to address with consultancy support. The process involves helping the client to describe the presenting problem or opportunity, gathering, assessing and analysing information from relevant sources and, as a result, developing a clearer picture of the organisation's circumstances and the precise nature of the problem or opportunity to be addressed. The level of the consultant's involvement will vary according to the context. In some situations, the consultant will be required to actually do the work, i.e. carry out the research and analysis and simply present findings to the client. At other times, the consultant may be asked to play a more facilitative role, introducing tools and techniques and providing expertise to help the client and people in the client's organisation to undertake the research themselves. A facilitative approach helps the client to gain a deeper understanding of the issues and, at the same time, learn new skills. This standard has been prepared in such a way as to allow for a range of different levels of involvement.

It is for consultants who work closely with clients to help them gain a fuller understanding of their circumstances and a closer definition of the problems and opportunities they face.

CFAMBCB1

Work with the client to understand their circumstances, problems and opportunities

Performance criteria

You must be able to:

- P1 work with the client and relevant stakeholders to articulate the nature of the problem or opportunity they are trying to address with your support
- P2 gather, or help the client to gather, information that may impact on the problem from a variety of relevant external as well as internal sources
- P3 assess, or help the client to assess, the information gathered to ensure it is valid, current, relevant and sufficient to provide a reliable and balanced view of the client's circumstances
- P4 use appropriate tools and techniques to analyse, or help the client to analyse, the information gathered
- P5 agree with the client and relevant stakeholders within the client's organisation a common understanding of their circumstances in the broader environment
- P6 work with the client to confirm or redefine the nature of the problem or opportunity they are trying to address in light of the analysis of the information gathered
- P7 work with the client to review their circumstances, problems and opportunities at appropriate times

CFAMBCB1

Work with the client to understand their circumstances, problems and opportunities

Knowledge and understanding

You need to know and understand:

Principles, methods, tools and techniques relating to:

- K1 analysing organisational culture
- K2 business analysis
- K3 building consensus
- K4 communication
- K5 defining and agreeing roles and responsibilities
- K6 establishing, developing and sustaining working relationships
- K7 evaluation
- K8 facilitation
- K9 information management and confidentiality
- K10 research and investigation
- K11 reviewing organisational performance

Industry/sector specific knowledge and understanding

- K12 relevant industry/sector specific knowledge and information on trends and developments
- K13 relevant industry/sector specific legal, regulatory, professional and ethical requirements

Context specific knowledge and understanding

- K14 key political, economic, social, technological, legal and environmental factors
- K15 knowledge and information on trends and developments in your professional/specialist/technical area
- K16 knowledge and understanding of the type and stage of growth of the organisation you are working with
- K17 relevant policies, procedures and requirements of the client organisation
- K18 your own knowledge, skills and competence and the limits of these

CFAMBCB1

Work with the client to understand their circumstances, problems and opportunities

Additional Information

Behaviours

1. Encourage clients to take responsibility for their own actions
2. Facilitate common understanding and consensus
3. Use appropriate facilitation principles, methods, tools and techniques effectively
4. Comply with legal requirements, industry regulations, organisational policies and professional codes
5. Keep confidential information secure
6. Check the validity and reliability of information
7. Work to develop an atmosphere of professionalism, mutual support and respect
8. Display a good understanding of how different factors in the work context relate to each other
9. Maintain up-to-date information on the political, economic, social, technological, legal and environmental factors that impact on work
10. Identify the range of elements in a situation and how they relate to each other
11. Build a valid picture from restricted or incomplete data
12. Articulate the assumptions made, and known risks involved, in understanding a situation

Links to other NOS

It links closely with all other standards in key area B Work with the client to identify their needs and agree solutions. It is also underpinned by A2 Develop and Sustain relationships with clients.

CFAMBCB1

Work with the client to understand their circumstances, problems and opportunities

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Originating organisation MSC

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Relevant occupations Business, Administration and Law; Arts, Media and Publishing; Professional Occupations; Managers and Senior Officials; Social sciences; Education and training; Preparation for life and work; Media Associate Professionals; Finance; Communications; General; Business and Finance Associate Professionals; Public Service and Other Associate Professionals

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

Key words clients, understand, circumstance, problems, opportunities

CFAMBCB2

Work with the client to generate and evaluate solutions



Overview

This standard is about helping the client to select an appropriate solution to address their problem or opportunity. A critical question is 'who should be involved in deciding on the solution, and at what stage, in order both to benefit from their ideas and experience and gain their support by sharing responsibility for decision-making with them?' The level of the consultant's involvement will vary according to the context. In some situations, the consultant will be required to actually do the work, i.e. identify and evaluate options and propose a solution, supported by a rationale and an analysis of advantages, disadvantages, risks and assumptions, for consideration by the client. At other times, the consultant may be asked to play a more facilitative role, introducing principles, methods, tools and techniques and providing expertise to help the client and people in the client's organisation to explore the options and arrive at the solution themselves. A facilitative approach helps the client to gain a deeper understanding of the issues and, at the same time, learn new skills. This standard has been prepared in such a way as to allow for a range of different levels of involvement.

It is for consultants who work closely with clients to help explore options and decide on solutions to address their problems and opportunities.

CFAMBCB2

Work with the client to generate and evaluate solutions

Performance criteria

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

CFAMBCB2

Work with the client to generate and evaluate solutions

Knowledge and understanding

You need to know and understand:

Principles, methods, tools and techniques relating to:

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

Industry/sector specific knowledge and understanding

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

Context specific knowledge and understanding

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

CFAMBCB2

Work with the client to generate and evaluate solutions

Additional Information

Behaviours

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

Links to other NOS

It links closely with all other standards in key area B Work with the client to identify their needs and agree solutions. It is also underpinned by A2 Develop and Sustain relationships with clients.

CFAMBCB2

Work with the client to generate and evaluate solutions

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Relevant occupations Business, Administration and Law; Arts, Media and Publishing; Professional Occupations; Managers and Senior Officials; Corporate Managers and Senior Officials; Education and training; Preparation for life and work; Foundations for learning and life; Functional Managers; Finance; Communications; General; Business and Finance Associate Professionals

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

Key words clients, generate, evaluate, solutions

CFAMBCB3

Work with the client to prepare and promote the business case for solutions



Overview

This standard is about helping the client to prepare a convincing business case for the selected solution and promoting this to decision-makers and other stakeholders. The level of the consultant's involvement will vary according to the context. In some situations, the consultant will be required to actually do the work, i.e. prepare the detailed business case and present this to internal stakeholders. At other times, the consultant may be asked to play a more facilitative role, introducing principles, methods, tools and techniques and providing expertise to help the client and people in the client's organisation to prepare and promote the business case themselves. A facilitative approach helps the client to gain a deeper understanding of the issues and, at the same time, learn new skills. This standard has been prepared in such a way as to allow for a range of different levels of involvement.

It is for consultants who work closely with clients to prepare and promote the business case for solutions.

CFAMBCB3

Work with the client to prepare and promote the business case for solutions

Performance criteria

You must be able to:

- P1 agree who is to be involved, taking account of their ability to contribute to the preparation of the business case and promote it to decision-makers and other stakeholders
- P2 develop the business case in an appropriate format, including:
 - P2.1 a clear statement of the objective(s) the solution is required to achieve and how the objective(s) contributes to strategic goals
 - P2.2 a clear rationale for the selection of the solution in preference to any alternative options
 - P2.3 a clear statement of the expected benefits, and any drawbacks, of the selected solution, quantified wherever possible
 - P2.4 an outline of the estimated costs involved
 - P2.5 an analysis of the risks involved and how these can be managed
 - P2.6 a statement of any assumptions made, together with the justification for and level of confidence in these assumptions
 - P2.7 an outline implementation plan, indicating timescales and resources required
- P3 communicate the business case to decision-makers using appropriate means, responding effectively to any questions they may have
- P4 negotiate aspects of the business case with decision-makers, where required, whilst ensuring that the solution is still feasible
- P5 consider alternative options, if the business case for the preferred solution is not accepted by decision-makers
- P6 win broader support for the selected solution, explaining its implications for different stakeholders and responding effectively to any questions, objections or concerns that may arise

CFAMBCB3

Work with the client to prepare and promote the business case for solutions

Knowledge and understanding

You need to know and understand:

Principles, methods, tools and techniques relating to

- K1 building consensus
- K2 business analysis
- K3 communication
- K4 defining and agreeing roles and responsibilities
- K5 developing proposals
- K6 establishing, developing and sustaining working relationships
- K7 facilitation
- K8 identifying stakeholders and their diverse interests, needs, abilities and preferences
- K9 influencing
- K10 making presentations
- K11 negotiation
- K12 objective setting
- K13 planning
- K14 problem-solving
- K15 project management
- K16 risk management

Industry/sector specific knowledge and understanding

- K17 relevant industry/sector specific knowledge and information on trends and developments
- K18 relevant industry/sector specific legal, regulatory, professional and ethical requirements

Context specific knowledge and understanding

- K19 key political, economic, social, technological, legal and environmental factors
- K20 knowledge and information on trends and developments in your professional/specialist/technical area
- K21 knowledge and understanding of the type and stage of growth of the organisation you are working with
- K22 relevant policies, procedures and requirements of the client organisation
- K23 your own knowledge, skills and competence and the limits of these

CFAMBCB3

Work with the client to prepare and promote the business case for solutions

Additional Information

Behaviours

1. Adopt communication media and styles appropriate to people and situations
2. Present information clearly, concisely, accurately and in ways that promote
3. Facilitate common understanding and consensus.
4. Use appropriate facilitation principles, methods, tools and techniques effectively
5. Support clients in planning, making and sustaining improvements autonomously
6. Identify clearly the value and benefits to people of a proposed course of action
7. Use factual evidence to support arguments
8. Work towards win-win solutions
9. Develop plans to meet the priorities of decision-makers
10. Identify key stakeholders and their interests
11. Identify the implications or consequences of a situation
12. Articulate the assumptions made, and known risks involved, in understanding a situation.

Links to other NOS

It links closely with all other standards in key area B Work with the client to identify their needs and agree solutions. It is also underpinned by A2 Develop and Sustain relationships with clients.

CFAMBCB3

Work with the client to prepare and promote the business case for solutions

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

Key words clients, prepare, promote, business case, solutions

CFAMBCB4

Work with the client to plan the implementation of solutions



Overview

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

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

CFAMBCB4

Work with the client to plan the implementation of solutions

Performance criteria

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

CFAMBCB4

Work with the client to plan the implementation of solutions

Knowledge and understanding

You need to know and understand:

Principles, methods, tools and techniques relating to

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

Industry/sector specific knowledge and understanding

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

Context specific knowledge and understanding

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

CFAMBCB4

Work with the client to plan the implementation of solutions

Additional Information

Behaviours

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

Links to other NOS

It links closely with all other standards in key area B Work with the client to identify their needs and agree solutions and leads on to the standards in key area C Support the client in achieving sustainable solutions. It is also underpinned by A2 Develop and Sustain relationships with clients

CFAMBCB4

Work with the client to plan the implementation of solutions

Developed by	Skills CFA
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Originating organisation	MSC
Original URN	CFAMBCB4
Relevant occupations	Business, Administration and Law; Information and Communication Technology; Arts, Media and Publishing; Health, Public Services and Care; Professional Occupations; Managers and Senior Officials; Research Professionals; Associate Professionals and Technical Occupations; Corporate Managers and Senior Officials; Retail and commercial enterprise; Education and training; Teaching and lecturing; Direct learning support; Preparation for life and work; Foundations for learning and life; Preparation for work; Accounting and finance; Administration; Business management; Functional Managers; Legal Professionals; Public Service Professionals; Government and Related Organisations; Finance; Communications; General; Business and Finance Associate Professionals
Suite	Management and Business Consultancy NOS 2009; NOS Suite for Management and Business Consultancy
Key words	clients, plan, implementation, solutions

CFAMBCC1

Support the client in implementing and monitoring solutions



Overview

This standard is about providing support to the client to implement and monitor planned solutions. It implies a strong project management process but recognises that the consultant is not the project manager; rather, the consultant is providing advice, expertise and facilitation skills to help the client manage the implementation of improvements.

It is for consultants who work closely with clients to support them in implementing solutions.

CFAMBCC1

Support the client in implementing and monitoring solutions

Performance criteria

- You must be able to:*
- P1 agree with the client your role and responsibilities, and those of any other members of the consultancy team, in the implementation
 - P2 fulfil your role and responsibilities within the implementation in line with your agreement
 - P3 provide facilitation, advice and expertise to the extent required for successful implementation in ways which maximise opportunities for the client's organisation to develop its own skills and expertise
 - P4 support the client in monitoring known risks to the implementation and in taking appropriate action to manage these risks
 - P5 support the client in monitoring progress of the implementation, making appropriate recommendations to address emerging challenges or opportunities
 - P6 support the client in communicating progress to those involved or affected by the implementation and to respond effectively to any feedback received
 - P7 help the client access any required specialist expertise which is beyond your own competence or that of the consultancy team

CFAMBCC1

Support the client in implementing and monitoring solutions

Knowledge and understanding

You need to know and understand:

Principles, methods, tools and techniques relating to

- K1 change management
- K2 communication
- K3 defining and agreeing roles and responsibilities
- K4 facilitation
- K5 monitoring
- K6 project management
- K7 providing feedback

Industry/sector specific knowledge and understanding

- K8 relevant industry/sector specific legal, regulatory, professional and ethical requirements

Context specific knowledge and understanding

- K9 relevant policies, procedures and requirements of the client organisation
- K10 sources of advice, guidance and support
- K11 your own knowledge, skills and competence and the limits of these

CFAMBCC1

Support the client in implementing and monitoring solutions

Additional Information

Behaviours

1. Find practical ways to overcome barriers to change.
2. Present information clearly, concisely, accurately and in ways that promote
3. Keep people informed of plans and developments.
4. Show respect for the views and actions of others.
5. Encourage clients to take responsibility for their own actions.
6. Use appropriate facilitation principles, methods, tools and techniques effectively.
7. Support clients in planning, making and sustaining improvements autonomously.
8. Comply with legal requirements, industry regulations, organisational policies and professional codes.
9. Act within the limits of your authority and competence.
10. Present self positively to others.
11. Identify clearly the value and benefits to people of a proposed course of action.
12. Use factual evidence to support arguments.
13. Show sensitivity to internal and external politics that impact on your own area of work.
14. Clarify own and others' expectations of relationships and develop shared understanding.
15. Work towards a clearly defined vision of the future.

Links to other NOS

It links closely with all other standards in key area C Support the client in achieving sustainable solutions and builds on the research, diagnosis and planning work described in key area B Work with the client to identify their needs and agree solutions. It is also underpinned by A2 Develop and Sustain relationships with clients.

CFAMBCC1

Support the client in implementing and monitoring solutions

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Indicative review date October 2011

Validity Current

Status Original

Originating organisation MSC

Original URN CFAMBCC1

Relevant occupations Business, Administration and Law; Arts, Media and Publishing; Professional Occupations; Managers and Senior Officials; Research Professionals; Engineering Professionals; Science Professionals; Associate Professionals and Technical Occupations; Corporate Managers and Senior Officials; Retail and commercial enterprise; Education and training; Direct learning support; Preparation for life and work; Foundations for learning and life; Preparation for work; Accounting and finance; Administration; Business management; Business management; Marketing and sales; Marketing and sales; Functional Managers; Functional Managers; Financial Institution and Office Manager; Financial Institution and Office Manager; Health Professionals; Health Professionals; Teaching Professionals; Teaching Professionals; Legal Professionals; Legal Professionals; Business and Statistical Professionals; Business and Statistical Professionals; Public Service Professionals; Public Service Professionals; Government and Related Organisations; Government and Related Organisations; Finance; Finance; Communications; General

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

Key words support, clients, implementation, monitoring, solutions

CFAMBCC2

Develop the client's capacity and competence to implement and sustain solutions



Overview

This standard is about ensuring the client has the capacity and competence to implement solutions and to be able to sustain these without continual reliance on support from consultants or external sources of help. It involves helping clients to identify, obtain and manage the range of resources – such as finance, premises, capital equipment, materials, information, people and intellectual property required to implement and sustain improvements. A major part of this is likely to be helping to bring about culture change and enabling the client and members of the client's organisation to develop their knowledge, skills and competence so that they feel confident to implement the changes and are able to sustain them autonomously. You may need to adopt a coaching style in order to achieve this, encouraging clients to take responsibility for results and providing feedback to reinforce effective and discourage ineffective behaviour.

It is for consultants who support clients by developing their capacity and competence to implement and sustain solutions.

CFAMBCC2

Develop the client's capacity and competence to implement and sustain solutions

Performance criteria

You must be able to:

- P1 work with the client to identify, obtain and manage the resources required to implement and sustain solutions
- P2 work with the client to identify any new knowledge, skills and competences required and plan how to develop these in line with people's work commitments and learning styles
- P3 support the client and members of the client's organisation in developing and adapting to any culture changes required to sustain the solutions
- P4 work with the client and members of the client's organisation to transfer relevant aspects of your expertise
- P5 provide feedback to the client and members of the client's organisation designed to develop their confidence in their new competences and sustain solutions
- P6 encourage the client and members of the client's organisation to take personal and collective responsibility for achieving and sustaining solutions
- P7 provide advice and support to the client and members of the client's organisation in ways that encourage them to become autonomous and not dependent on you

CFAMBCC2

Develop the client's capacity and competence to implement and sustain solutions

Knowledge and understanding

You need to know and understand:

Principles, methods, tools and techniques relating to

- K1 change management
- K2 communication
- K3 enabling the client to take responsibility for improvements and work autonomously
- K4 facilitation
- K5 identifying gaps in knowledge, skills and competences
- K6 information management and confidentiality
- K7 learning and development
- K8 providing feedback
- K9 resource management
- K10 transferring knowledge

Industry/sector specific knowledge and understanding

- K11 relevant industry/sector specific legal, regulatory, professional and ethical requirements

Context specific knowledge and understanding

- K12 relevant policies, procedures and requirements of the client organisation
- K13 your own knowledge, skills and competence and the limits of these

CFAMBCC2

Develop the client's capacity and competence to implement and sustain solutions

Additional Information

Behaviours

1. Present information clearly, concisely, accurately and in ways that promote
2. Give feedback to others to help them improve their performance.
3. Encourage clients to take responsibility for their own actions.
4. Use appropriate facilitation principles, methods, tools and techniques effectively.
5. Support clients in planning, making and sustaining improvements autonomously.
6. Freely share learning with others who can benefit from it.
7. Comply with legal requirements, industry regulations, organisational policies and professional codes.
8. Articulate a realistic vision that generates excitement, enthusiasm and commitment.
9. Show sensitivity to internal and external politics that impact on your own area of work.
10. Clarify own and others' expectations of relationships and develop shared understanding.
11. Maintain up-to-date information on the political, economic, social, technological, legal and environmental factors that impact on work.
12. Anticipate likely future scenarios based on a realistic analysis of trends and developments.

Links to other NOS

It links closely with all other standards in key area C Support the client in achieving sustainable solutions and builds on the research, diagnosis and planning work described in key area B Work with the client to identify their needs and agree solutions. It is also underpinned by A2 Develop and Sustain relationships with clients.

CFAMBCC2

Develop the client's capacity and competence to implement and sustain solutions

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Status Original

Originating organisation MSC

Original URN CFAMBCC2

Relevant occupations Business, Administration and Law; Arts, Media and Publishing; Professional Occupations; Managers and Senior Officials; Associate Professionals and Technical Occupations; Corporate Managers and Senior Officials; Managers and Proprietors in Hospitality; Retail and commercial enterprise; Education and training; Education and training; Teaching and lecturing; Direct learning support; Preparation for life and work; Preparation for life and work; Foundations for learning and life; Foundations for learning and life; Preparation for work; Accounting and finance; Administration; Business management; Marketing and sales; Marketing and sales; Law and legal services; Functional Managers; Financial Institution and Office Manager; Health and Social Services Officers; Legal Professionals; Government and Related Organisations; Finance; Communications; General

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

Key words develop, clients, capacity, competence, implement, sustain, solutions

CFAMBCC3

Support the client in measuring and evaluating performance



Overview

This standard is about supporting the client to measure performance in specific areas and to develop and use appropriate systems to monitor and evaluate performance. Measurement and evaluation of performance are important aspects of all consultancy assignments. They are necessary for accurate analysis and diagnosis of problems and opportunities and underpin the implementation of solutions by providing data for monitoring progress and evaluating whether the anticipated results have been achieved.

It is for consultants who help clients to measure performance in critical areas and evaluate whether the required performance has been achieved.

CFAMBCC3

Support the client in measuring and evaluating performance

Performance criteria

- You must be able to:*
- P1 identify the key measures of performance that are appropriate and relevant to the area of work under scrutiny
 - P2 develop appropriate systems for gathering, managing and analysing data for key measures of performance, making best use of existing systems and data sources where these are available and appropriate
 - P3 gather and analyse data about past, current and expected future performance against these key measures of performance
 - P4 benchmark performance with other comparable organisations and/or departments, where relevant
 - P5 develop and agree with those involved realistic targets for key measures of performance and interim targets to be achieved at agreed points
 - P6 monitor actual performance against targets at agreed points
 - P7 analyse and understand actual performance data and evaluate whether targets have been achieved
 - P8 report actual performance against targets to those who need to know in appropriate formats, providing justifiable explanations for any variances
 - P9 agree with those involved how performance is to be sustained and/or further improved

CFAMBCC3

Support the client in measuring and evaluating performance

Knowledge and understanding

You need to know and understand:

Principles, methods, tools and techniques relating to

- K1 benchmarking performance
- K2 business analysis
- K3 communication
- K4 evaluation
- K5 facilitation
- K6 information management and confidentiality
- K7 monitoring
- K8 objective setting
- K9 quality assurance and continuous improvement
- K10 reviewing organisational performance

Industry/sector specific knowledge and understanding

- K11 relevant industry/sector specific knowledge and information on trends and developments
- K12 relevant industry/sector specific legal, regulatory, professional and ethical requirements

Context specific knowledge and understanding

- K13 key political, economic, social, technological, legal and environmental factors
- K14 knowledge and information on trends and developments in your professional/specialist/technical area
- K15 knowledge and understanding of the type and stage of growth of the organisation you are working with
- K16 relevant policies, procedures and requirements of the client organisation

CFAMBCC3

Support the client in measuring and evaluating performance

Additional Information

Behaviours

1. Use appropriate facilitation principles, methods, tools and techniques effectively.
2. Support clients in planning, making and sustaining improvements autonomously.
3. Comply with legal requirements, industry regulations, organisational policies and professional codes.
4. Act within the limits of your authority and competence.
5. Keep confidential information secure.
6. Analyse and structure information to develop knowledge that can be shared.
7. Present self positively to others.
8. Work to develop an atmosphere of professionalism, mutual support and respect.
9. Model behaviour that shows respect, helpfulness and co-operation.
10. Display a good understanding of how different factors in the work context relate to each other.
11. Maintain up-to-date information on the political, economic, social, technological, legal and environmental factors that impact on work.
12. Work towards a clearly defined vision of the future.

Links to other NOS

This standard underpins C1 Support the client in implementing and monitoring solutions and all the standards in key area B Work with the client to identify their needs and agree solutions. It may also be used as a stand-alone standard when the consultant is asked to provide specific support to help the organisation measure and evaluate its performance in critical areas.

CFAMBCC3

Support the client in measuring and evaluating performance

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Relevant occupations Business, Administration and Law; Business, Administration and Law; Arts, Media and Publishing; Arts, Media and Publishing; Professional Occupations; Professional Occupations; Managers and Senior Officials; Managers and Senior Officials; Associate Professionals and Technical Occupations; Corporate Managers and Senior Officials; Corporate Managers and Senior Officials; Retail and commercial enterprise; Education and training; Teaching and lecturing; Direct learning support; Preparation for life and work; Foundations for learning and life; Preparation for work; Accounting and finance; Administration; Business management; Marketing and sales; Law and legal services; Production Managers; Functional Managers; Financial Institution and Office Manager; Health and Social Services Officers; Health Associate Professionals; Artistic and Literary Occupations; Media Associate Professionals; Administration and Secretarial Occupations; Government and Related Organisations; Finance; Records; Communications; General; Business and Finance Associate Professionals; Conservation Associate Professionals; Public Service and Other Associate Professionals;

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

Key words support, clients, measuring, evaluating, performance

Overview

It is essential that consultants observe professional and ethical standards and work to agreed quality standards at all times. This standard focuses on being clear about these professional and ethical standards and identifying and resolving any issues which may prevent these standards being rigorously met. It is also about establishing measurable quality standards for your work and evaluating, with the client if appropriate, whether you are meeting these fully. Professional and ethical standards govern the way in which consultants interact with clients and others with whom they work. This standard, therefore, also covers these relationships, including observing professional boundaries and confidentiality and handling conflicts between yourself and others with whom you work.

It is a fundamental standard for all consultants.

CFAMBCD1

Work to professional, ethical and quality standards

Performance criteria

- You must be able to:*
- P1 identify and comply with the professional and ethical standards, codes of practice and legal requirements that apply to your role
 - P2 identify any actual or potential conflicts between the requirements of your work and relevant professional and ethical standards/codes of practice and resolve these, with the support of a manager, supervisor, advisor or client, if required
 - P3 establish measurable quality standards for your work and evaluate – with the support of the client, if appropriate – the extent to which you are meeting/have met these
 - P4 resolve any disagreements with the client about the quality of your work in a professional manner, engaging the support of a third party, if required
 - P5 establish your role and the roles of others with whom you work and maintain clear professional boundaries
 - P6 encourage those with whom you work to work in a professional and mutually supportive manner, including modelling the behaviour you are seeking to encourage
 - P7 treat information with the required level of confidentiality
 - P8 communicate appropriately with those with whom you work, ensuring that they have the information they require in order to work effectively
 - P9 identify any conflicts between yourself and those with whom you work and resolve these in a professional manner, with the support of a manager, supervisor, advisor or client, if required
 - P10 provide feedback to those with whom you work designed to help them comply with professional and ethical standards and develop their performance to meet quality standards

CFAMBCD1

Work to professional, ethical and quality standards

Knowledge and understanding

You need to know and understand:

Principles, methods, tools and techniques relating to

- K1 communication
- K2 conflict management
- K3 defining and agreeing roles and responsibilities
- K4 developing an atmosphere of professionalism and mutual respect
- K5 establishing, developing and sustaining working relationships
- K6 information management and confidentiality
- K7 providing feedback
- K8 quality assurance and continuous improvement

Industry/sector specific knowledge and understanding

- K9 relevant industry/sector specific legal, regulatory, professional and ethical requirements

Context specific knowledge and understanding

- K10 relevant policies, procedures and requirements of your organisation
- K11 sources of advice, guidance and support

CFAMBCD1

Work to professional, ethical and quality standards

Additional Information

Behaviours

1. Present information clearly, concisely, accurately and in ways that promote understanding
2. Show respect for the views and actions of others.
3. Give feedback to others to help them improve their performance.
4. Comply with legal requirements, industry regulations, organisational policies and professional codes.
5. Acknowledge when own interests are in conflict with common goals.
6. Identify and raise ethical concerns.
7. Keep confidential information secure.
8. Make appropriate information and knowledge available promptly to those who have a right to it.
9. Work to develop an atmosphere of professionalism, mutual support and respect.
10. Clarify own and others' expectations of relationships and develop shared understanding.
11. Model behaviour that shows respect, helpfulness and co-operation.
12. Take timely action to resolve disagreements.
13. Recognise when there are conflicts, acknowledge the feelings and views of all parties, and redirect people's energy towards a common goal.
14. Set achievable objectives for self and give a consistent and stable performance.

Links to other NOS

This standard is transversal and underpins all the other standards in the National Occupational Standards for Management and Business Consultancy

CFAMBCD1

Work to professional, ethical and quality standards

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Relevant occupations Business, Administration and Law; Information and Communication Technology; Arts, Media and Publishing; Health, Public Services and Care; Professional Occupations; Managers and Senior Officials; Information and Communication Technology; Research Professionals; Engineering Professionals; Science Professionals; Associate Professionals and Technical Occupations; Corporate Managers and Senior Officials; Social sciences; Education and training; Teaching and lecturing; Direct learning support; Preparation for life and work; Foundations for learning and life; Preparation for work; Accounting and finance; Administration; Business management; Marketing and sales; Law and legal services; Functional Managers; Financial Institution and Office Manager; Health Professionals; Teaching Professionals; Legal Professionals; Business and Statistical Professionals; Administration and Secretarial Occupations; Government and Related Organisations; Finance; Communications; General

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

Key words work, professional, ethical, quality, standards

Overview

This standard is about continuing professional development – making sure you have the skills, knowledge and understanding to meet the current and future requirements of your professional role. There are two dimensions to this.

1. Reflective practice – considering your own work and evaluating what works well and what does not work so well and adapting your approach accordingly. Reflective practice is often most effective when undertaken together with someone else, such as your manager, professional supervisor, the client or some other advisor.

2. Professional updating – proactively keeping abreast of best practice in the provision of consultancy, your specialism(s) and the sector(s) in which you operate.

Reflection on your own practice and research into developments in the wider environment may indicate the need to undertake training or development, apply newly-acquired knowledge or skills and evaluate the results in a continuing cycle of professional development.

It is a fundamental standard for all consultants.

CFAMBCD2

Continuously develop your practice

Performance criteria

You must be able to:

- P1 evaluate, at appropriate intervals, the current and future requirements of your professional role
- P2 reflect on and evaluate your own practice – with the support of your manager, supervisor, advisor and/or client, if appropriate – to identify areas where your practice could improve
- P3 identify trends, developments and emerging best practice in:
 - P3.1 the provision of consultancy
 - P3.2 your area(s) of specialist expertise
 - P3.3 the sector(s) in which you operate
- P4 identify the learning styles which work best for you and take these into account when identifying, planning and undertaking development activities
- P5 identify any gaps between the current and future requirements of your professional role and your current knowledge and skills
- P6 create – with the support of your manager, supervisor or advisor, if appropriate – a development plan to address any gaps in your current knowledge and skills
- P7 undertake the activities identified in your development plan
- P8 adapt the way you work to take account of your evaluation of your own practice, identified trends, developments and best practice and any newly-acquired knowledge and skills
- P9 obtain regular, objective and valid feedback on your performance from those who are in a position to provide it
- P10 evaluate the impact of your professional development and changes to the way you work on your performance and undertake further development or changes, where required

CFAMBCD2

Continuously develop your practice

Knowledge and understanding

You need to know and understand:

Principles, methods, tools and techniques relating to

- K1 benchmarking performance
- K2 communication
- K3 evaluation
- K4 identifying gaps in knowledge, skills and competences
- K5 learning and development
- K6 providing feedback
- K7 quality assurance and continuous improvement
- K8 research and investigation

Industry/sector specific knowledge and understanding

- K9 relevant industry/sector specific legal, regulatory, professional and ethical requirements

Context specific knowledge and understanding

- K10 relevant policies, procedures and requirements of your organisation
- K11 sources of advice, guidance and support
- K12 your own knowledge, skills and competence and the limits of these

CFAMBCD2

Continuously develop your practice

Additional Information

Behaviours

1. Constantly seek to improve performance.
2. Try out new ways of working.
3. Take responsibility for meeting own learning and development needs.
4. Encourage and welcome feedback from others and use this feedback constructively.
5. Reflect regularly on own and others' experiences, and use these to inform future actions.
6. Develop self and others to meet the demands of changing situations.
7. Show an awareness of your own values, motivations and emotions.
8. Set achievable objectives for self and give a consistent and stable performance.
9. Recognise own strengths and limitations.

Links to other NOS

This standard is transversal and underpins all the other standards in the National Occupational Standards for Management and Business Consultancy.

CFAMBCD2

Continuously develop your practice

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Relevant occupations Business, Administration and Law; Business, Arts, Media and Publishing; Professional Occupations; Managers and Senior Officials; Associate Professionals and Technical Occupations; Corporate Managers and Senior Officials; Publishing and information services; Social sciences; Teaching and lecturing; Direct learning support; Preparation for life and work; Foundations for learning and life; Preparation for work; Accounting and finance; Administration; Business management; Marketing and sales; Law and legal services; Production Managers; Functional Managers; Financial Institution and Office Manager; Artistic and Literary Occupations; Media Associate Professionals; Administration and Secretarial Occupations; Administration and Secretarial Occupations; Government and Related Organisations; Finance; Communications; General; Business and Finance Associate Professionals; Public Service and Other Associate Professionals

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

Key words continue, development, consultancy practice, reflective practice, professional updating

CFAMBCD3

Develop your professional networks



Overview

This standard is about developing your professional networks to support both your current and future work. Your professional networks may include people in your own organisation, people you meet from other organisations and people you are in contact with over the phone or the Internet. Developing professional networks is based on the principles of reciprocity (exchanging information, contacts and resources with others for mutual benefit) and confidentiality. People only want to network if there are mutual benefits from exchanging information and other resources. There must also be clearly agreed boundaries of confidentiality – certain information and resources may not be exchanged because they are confidential.

It is for all consultants, whatever profession or sector they are working in and whether they work as external or internal consultants.

CFAMBCD3

Develop your professional networks

Performance criteria

- You must be able to:*
- P1 develop and maintain professional networks of contacts, which are appropriate to meet your current and future needs for information and resources
 - P2 ensure that key members of your professional networks have an accurate idea of your knowledge, understanding, skills, abilities and experience and are aware of the benefits of networking with you
 - P3 establish boundaries of confidentiality between yourself and members of your professional networks and, where appropriate, develop guidelines for exchanging information and resources
 - P4 make active use of the information and resources gained through your professional networks
 - P5 introduce people and organisations with common interests to each other

CFAMBCD3

Develop your professional networks

Knowledge and understanding

You need to know and understand:

Principles, methods, tools and techniques relating to

- K1 communication
- K2 establishing, developing and sustaining working relationships
- K3 information management and confidentiality
- K4 networking

Industry/sector specific knowledge and understanding

- K5 relevant industry/sector specific knowledge and information on trends and developments
- K6 relevant industry/sector specific legal, regulatory, professional and ethical requirements

Context specific knowledge and understanding

- K7 key political, economic, social, technological, legal and environmental factors
- K8 knowledge and information on trends and developments in your professional/specialist/technical area
- K9 knowledge and understanding of the type and stage of growth of the organisation you are working with
- K10 relevant policies, procedures and requirements of your organisation
- K11 your own knowledge, skills and competence and the limits of these

CFAMBCD3

Develop your professional networks

Additional Information

Behaviours

1. Reflect regularly on own and others' experiences, and use these to inform future actions.
2. Acknowledge when own interests are in conflict with common goals.
3. State own position and views clearly in conflict situations.
4. Identify and work with people and organisations who can provide support for own work.
5. Encourage free and reciprocal exchange of information and resources.
6. Work to develop an atmosphere of professionalism, mutual support and respect.
7. Clarify own and others' expectations of relationships and develop shared understanding.
8. Model behaviour that shows respect, helpfulness and co-operation.
9. Keep promises and honour commitments.
10. Consider the impact of your own actions on others.

Links to other NOS

Developing professional networks is particularly important for consultants in order to develop new and follow-on business, draw on specialist expertise and continuously develop knowledge and skills. It therefore links closely with A1 Establish and Develop relationships with prospective clients, A3 Develop and sustain relationships with colleagues and stakeholders and D2 Continuously develop your practice. This standard is based on A3 Develop your personal networks from the Management and Leadership standards, and is designed to provide full credit transfer.

CFAMBCD3

Develop your professional networks

Developed by Skills CFA

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Validity Current

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

Key words develop, professional, networks, exchange of information, organisation