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INSTITUTE OF ENTERPRISE AND ENTREPRENEURS

BUSINESS INFORMATION

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

Summary

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.

What you need to show

You must make sure that your practice meets the following requirements.

a   Deal with client enquiries efficiently and politely, in line with relevant guidelines for providing support services.

b   Maintain contact and exchange information with clients through face-to-face meetings or by phone or e-mail.

c   Encourage your clients to clearly explain what they need and to ask for more information and help, if and when they need it.

d   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.

e   Ask for advice and guidance when you are not confident in your understanding of the client's business needs.

f   Manage client's expectations in responding to their information needs, in terms of potential benefits, limitations, timescales and any costs involved.

g   Direct clients who need specialist information or advice to those qualified to provide such support, provide contact details, make introductions or appointments, where appropriate.

h   Propose and promote services (including costs) that are likely to meet your clients' needs.

i   Advise clients about any funding that they are eligible to claim for business support services.

j   Make sure that your clients understand the scope of the services offered by your organisation.

k   Keep up-to-date and accurate records of client contact at all stages of the process.

l   Assure your clients of confidentiality at all times.

m   End contact with a client in a way that encourages them to contact you in the future.

What you need to know and understand

You need to know, understand and be able to apply each of the following.

Interpersonal and communication skills

1   How to use effective interpersonal and communication skills, including, when appropriate:

   o   dealing with clients with different backgrounds and cultures;

   o   listening fully and attentively;

   o   questioning and reflecting back;

   o   checking accuracy;

   o   summarising;

   o   respecting and acknowledging issues;

   o   interviewing, reviewing and deciding on needs;

   o   negotiation;

   o   giving, receiving and passing on constructive feedback;

   o   guaranteeing client confidentiality; and

   o   dealing with difficulties.

2   The benefits and drawbacks of different kinds of communication in different circumstances (for example, face-to-face contact, phone, fax and e-mail).

3   How to deal with clients whose first language is not English.

4   Different ways that clients may react to and take in information.

5   The importance of pacing information in a way that will aid understanding to suit the client's capacity to absorb it.

6   Why and when to check that the client is making sense of the information you are presenting.

Client information needs

7   How to recognise the nature of the enquiry and why the client needs the information or product.

8   What questioning techniques may be suited to the client's communication style and information needs.

9   How to deal with an enquiry in a way that satisfies the client.

10 The answers to frequently asked questions from clients.

11 The client's personal and business objectives and needs.

12 The client's business operations.

13 How to investigate beyond the client's stated needs to explore what their real needs may be.

14 How business needs may vary in terms of:

   o   size;

   o   stage of development;

   o   the industrial sector they operate in; and

- o whether they are public, private or voluntary sector.

15 How to identify whether a client's business information needs can be met by your organisation or by any other services.

16 The limits of your own skills and knowledge.

17 When and where to get any advice, if you do not understand the client's business.

18 The importance of operating legally.

Business information research skills

19 The advantages and disadvantages of different sources of information, including:

- o local information;
- o statistical information;
- o market research information;
- o in-house or online databases, business directories and guides;
- o newspapers, periodicals and specialist business publications;
- o information on companies and products;
- o information from councils and government; and
- o information about legislation (eg Employment Law, Health and Safety Law, Business taxation, Environmental protection, Intellectual property, International trade).

20 How to research different information systems (eg the Internet, own organisation's information materials or another organisation's resources).

21 How to exploit the potential of computer and paper-based information systems.

22 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).

23 How to present different types of business information so that it is clear and easy to follow for different audiences.

Business support services

24 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).

25 Roles and responsibilities within your organisation.

26 The guidelines for providing support services set by your organisation or professional body about:

- o maintaining confidentiality in different working environments;
- o ethics, values and professional standards;
- o equal opportunities, diversity and social inclusion;
- o funding and other support available to the client;
- o using information management systems;
- o using invoicing systems, pricing and credit-control policies; and
- o procedures for quality assurance and handling complaints.

27 The role of your organisation in developing competition among local businesses.

Funding and resources

28 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).

29 How to co-ordinate support services that match different client needs.

30 The funding that is available and relevant to the client's needs.

31 The procedures of funding agencies.

Personal behaviours

You need to show the following behaviours.

32 Appreciate how an organisation operates in different client sectors. [IiP1.1]

33 Tailor your approach to align with the client's goals and circumstances. [IiP1.2]

34 Respect the client's need for information, commitment and confidentiality. [IiP1.3]

35 Deliver thoughts in straightforward terms, but maintain listener interest [IiP4.2]

36 Listen and respond effectively, and check understanding. [IiP4.3]

37 Have a rigorous but impartial questioning style [IiP4.4]

38 Adapt your personal style to empathise with a whole range of clients. [IiP6.1]

39 Build and maintain rapport over sustained periods. [IiP6.2]

40 Invite a two-way exchange of information and feedback with clients and others. [IiP6.3]

41 Maintain an impartial approach by avoiding subjectivity or making assumptions.

42 Persevere in trying to find the most appropriate information.

43 Be patient when questioning clients and presenting information.

Links to other National Occupational Standards

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:

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

Council for Administration Business Administration units:

> 105 Store and retrieve information
>
> 209 Store, retrieve and archive information
>
> 219 Use a telephone system

Institute of Customer Service Customer Service units:

> 3 Communicate effectively with customers
>
> 6 Recognise and deal with customer queries, requests and problems
>
> 10 Promote additional services or products to customers

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15 Deal with customers in writing or using ICT

16 Deal with customers face to face

17 Deal with customers by telephone

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

E11 Communicate information and knowledge

2 Research and provide clients with the business information they need

Summary

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.

This unit is imported and tailored from Ento's National Occupational Standards for Advice and Guidance unit AG 19 Undertake research for the service and its clients.

What you need to show

You must make sure that your practice meets the following requirements

a   Identify clearly the type and range of information required.

b   Identify and evaluate the sources of information for their contribution to the research.

c   Approach sources of information with a clear explanation of the purpose of the research.

d   Ascertain clearly the procedures that are required to access the information.

e   Specify clearly any risks to the sources of information from the research.

f   Identify any problems with the collection of necessary information and take appropriate action to deal with them.

g   Access the sources of information according to agreed procedures.

h   Collect information in line with the requirements of the research.

i   Apply information collection methods correctly and consistently.

j   Ensure the analysis methods are appropriate to the information and the aims of the research.

k   Analyse information accurately according to the appropriate methodology.

l   Interpret and synthesise the results carefully, and draw suitable conclusions.

m   Identify any unexpected results and suggest reasons for them.

n   Present the results of the research in a manner appropriate to its aims and objectives.

o   Acknowledge appropriately all sources of information.

p   Review the progress and results of the research with the relevant people wherever possible.

q   Protect confidential information in accordance with agreements and procedures.

r   Evaluate the success of the research against the specified evaluation criteria.

s   Record the collected information and the results of the research in the appropriate systems.

t   Comply with all relevant legislation, codes of practice, guidelines, and ethical requirements.

What you need to know and understand

You need to know, understand and be able to apply each of the following.

Identify sources and availability of information

1   What types of information are required.

2   What the potential sources of information are.

3   How the sources of information have cooperated in the past.

4   Why it is important to be clear about the research being undertaken.

5   What the access procedures for different types of information are.

6   The rules of confidentiality relating to different types of information.

7   What the different risks are that should be considered, and how to minimise their effects.

8   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

9   What the agreed procedures are for accessing information.

10 Which information collection procedures are required.

11 Why it is important to apply the collection methods correctly and consistently and the consequences of not doing so.

12 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.

13 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

14 Which analysis methods could be used.

15 What analysis methods have proved most useful in the past.

16 How to use the analysis methods.

17 Why it is important to provide a rationale for the results.

18 What types of result are expected and the possible reasons for unexpected results.

19 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.

20 Who should be involved in reviewing the research.

Report the results of the research

21 How to present different types of research results.

22 Who should be acknowledged in the research.

23 Who should be involved in reviewing the research.

24 What types of information sources should be protected.

25 What types of information might be confidential.

26 What the criteria are for evaluating the success of the research.

27 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

28 The relevant national, local, professional, and organisational requirements that relate to equal opportunities, discrimination, health and safety, security, confidentiality, and data protection.

29 Why it is important to comply with different requirements.

30 What the consequences are of not complying with different requirements.

31 How to obtain information on the requirements.

Links to other National Occupational Standards

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:

E11 Communicate information and knowledge:

3 Contribute to administering and promoting business information services

Summary

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.

What you need to show

You must make sure that your practice meets the following requirements.

a   Set-up and up-date client records in line with relevant legal requirements and organisation guidelines.

b   Maintain complete, accurate and up-to-date records of client contacts and follow up.

c   Use diary systems effectively to plan and manage your own and other colleague's activities to meet deadlines.

d   Make sure that the necessary materials are available for the business information service to operate on a day-to-day basis.

e   Prepare and supply materials needed to inform clients and others about the business support services offered by your organisation.

f   Make sure that materials are organised in a way that that helps people access what they need.

g   Plan and organise meetings or events that contribute to promoting and providing business support services.

h   Contribute to presenting the business support service in a way that clearly explains and effectively promotes the benefits and activities offered.

i   Make sure that your activities support and promote effective customer service.

What you need to know and understand

You need to know, understand and be able to apply each of the following.

Communication and interpersonal skills

1 How to listen and question.

2 How to summarise and exchange information.

3 How to interview, review and decide on needs.

4 How to negotiate, challenge and deal with difficulties.

5 Your colleagues' and contacts' interests, skills and preferred ways of working with you.

Client records

6 What and when information is recorded about client contacts and follow up.

7 How to set-up, maintain and monitor records using your organisation's client relationship management (CRM) system.

8 The legislation and organisational guidelines relevant to client records (such as about data protection, freedom of information, confidentiality).

Diary systems

9 Why it is important to use diary systems to plan and co-ordinate activities and resources.

10 How to make diary entries using your organisation's diary system.

11 How to prioritise and balance competing requirements and resources.

12 How to negotiate and agree any changes to arrangements and make sure that all those involved have been informed.

13 The types of security and confidentiality issues relevant to diary systems and how to manage them.

Materials

14 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).

15 How materials are procured within the available budget.

16 The different types of information materials that need to be organised.

17 Why it is important to store information securely.

18 How to layout and structure information materials so that they can be accessed easily by users.

19 How to organise and present indexes or catalogues so that users can easily locate information materials.

20 How to use computer and machine-based information storage systems.

21 How to handle information materials in line with health and safety guidelines.

Meetings or events

22 The purpose and resources needed in advance and on the day (such as budget, venue, equipment, catering, information).

23 The role and responsibilities of those involved, including any health, safety and security requirements that need to be taken into account.

24 Who will attend, when and how they will be invited, and any special requirements they may have.

25 How to present business support services effectively to different audiences.

26 The types of problems that may occur during the event or meeting and how to solve these.

27 Whether any records will be kept or circulated afterwards, by whom and how.

Customer service

28 What is meant by the term 'customer' and who the customers are for your team and organisation.

29 Why effective and efficient customer service, and continuous improvement, is important.

30 The quality standards that apply to customer service.

31 How to set and meet timescales and quality standards for your customers.

32 Why it is important to monitor customer satisfaction and how to do so.

33 The types of problems that customers may experience and how to solve them.

Personal behaviours

You need to show the following behaviours.

34 Gain respect by operating in a professional and credible manner [IiP2.1]

35 Engender co-operation by considering the perspective of others [IiP2.2]

36 Handle disagreements or resistance constructively and fairly [IiP2.3]

37 Confidence about your own knowledge and ability [IiP2.4]

38 Think strategically, take a holistic view of the way forward [IiP3.1]

39 Strive to add value by achieving results in the best way [IiP7.1]

40 Develop yourself to improve performance [IiP7.2]

41 Remain positive and maintain effort despite setbacks, changes or ambiguities [IiP7.3]

42 Achieve results through the guided actions of others [IiP7.4]

43 Prioritise and schedule to ensure optimum use of time and resource [IiP5.2]

44 Be sufficiently organised and flexible to switch between several ongoing tasks [IiP5.3]

45 Recognise when plans need to be adapted and act accordingly [IiP5.4]

46 Invite a two-way exchange of information and feedback with others [IiP6.3]

Links to other National Occupational Standards

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:

Council for Administration Business Administration units:

106 Store and retrieve information

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204 Manage diary systems

209 Store, retrieve and archive information

211 Organise and support meetings

224 Produce documents

304 Procure products and services

311 Plan, organise and support meetings

313 Organise and coordinate events

412 Chair meetings

Institute of Customer Service Customer Service units:

1 Prepare yourself to deliver good customer service

2a Maintain a positive and customer-friendly attitude

2b Adapt your behaviour to make a good customer service impression

4 Do your job in a customer-friendly way

5 Provide customer service within the rules

6 Recognise and deal with customer queries, requests and problems

7 Understand customer service to improve service delivery

8 Know the rules to follow when developing customer service

9 Give customers a positive impression of yourself and your organisation

12 Live up to the customer service promise

13 Make customer service personal

21 Deliver reliable customer service

22 Deliver customer service on your customer's premises

29 Evaluate the quality of customer service

30 Build and maintain effective customer relations

37 Support customer service improvements

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

D11. Lead meetings

D12. Participate in meetings

4 Provide and maintain the materials needed to deliver business information

Summary

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.

What you need to show

You must make sure that your practice meets the following requirements

a   Review the information materials currently used by the service and its clients.

b   Identify clearly the way the information materials are used.

c   Consult with all relevant sources on the effectiveness of the information materials currently used.

d   Explore the future requirements for information materials.

e   Identify any trends or developments in the dissemination of information materials.

f   Identify the resources available for obtaining the information materials.

g   Specify clearly the information materials that should be obtained.

h   Determine suitable methods to obtain the information materials.

i   Comply with procedures for accessing and obtaining information materials.

j   Agree realistic time scales and resources for obtaining the information materials.

k   Obtain suitable information materials that contribute to the service.

l   Identify any problems with obtaining the information materials.

m   Record and store the information materials in the appropriate systems.

n   Maintain sufficient sources of freely available information materials to meet the requirements of clients.

o   Protect information sources effectively from damage and inappropriate use or alteration.

p   Identify any aspects of the information materials that could be improved.

q   Assess the overall effectiveness of the information materials against the agreed evaluation criteria.

r   Identify the most appropriate methods for improving the information materials.

s   Identify the resources required to implement the improvements.

t   Present a clear rationale for the improvements and support it with suitable evidence.

u   Consult with all relevant people on the improvements.

v   Record the results of the consultation in the appropriate systems.

w   Ensure the information materials and any proposed improvements comply with

legislation, codes of practice, guidelines, and ethical requirements.

What you need to know and understand

You need to know, understand and be able to apply each of the following.

Identify the requirements for information materials in the service

1   What types of information materials are used.

2   Which aspects of the service they cover.

3   Who the clients are who use information materials.

4   What format the information materials are in.

5   How many people use the information materials.

6   Who can provide information on the use of the information materials.

7   Which potential clients would use the information materials.

8   What the potential future requirements of the information materials might be.

9   What the seasonal or other variations in demand for information materials might be.

10 Who can provide information on future requirements.

11 What types of trends or developments might occur.

12 How to assess the impact of information and communication technologies.

13 Which resources might be available.

14 What the constraints of the resources are.

15 Who requires information on the information materials being obtained.

Obtain information materials for use in the service

16 What methods could be available for obtaining information materials.

17 What the organisational guidelines and procedures are for accessing and obtaining information materials.

18 Which factors might affect the time scales for obtaining information materials.

19 Which resources are required for obtaining information materials.

20 How to assess the information materials' contribution to the service.

21 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.

22 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

23 How often the information materials/ sources should be updated.

24 Who should be involved in reviewing the information materials and sources.

25 How to protect different types and formats of information materials and sources.

26 The potential types of damage which could occur to information materials.

27 How information sources could be inappropriately used or altered.

28 What information can be collected on the effectiveness of the information materials.

29 Which aspects of the information materials have the potential to be improved.

30 How to asses the effectiveness of the information materials.

31 What the evaluation criteria are for the effectiveness of the information materials and sources.

32 How to improve different types of information materials.

33 What types of improvement could be suggested.

34 Which resources are required to implement different types of improvement.

35 Why it is important to provide a clear rationale for improvements.

36 What types of evidence may be necessary to support the rationale for improvements.

37 Who should be consulted on improvements to information materials.

38 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

39 The relevant national, local, professional, and organisational requirements that relate to equal opportunities, discrimination, health and safety, security, confidentiality, and data protection.

40 Why it is important to comply with different requirements.

41 What the consequences are of not complying with different requirements.

42 How to obtain information on the requirements.

Links to other National Occupational Standards

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:

E8. Manage physical resources

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

Summary

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.

What you need to show

You must make sure that your practice meets the following requirements.

a   Actively seek opportunities to make new contacts using formal and informal techniques.

b   Contribute to your network contacts in a way that builds their confidence in you.

c   Ask contacts for information, advice and further contacts that will benefit your clients.

d   Make sure your network contacts understand your needs for information, resources and further contacts.

e   Evaluate how new contacts can add value to the service provided to particular clients now and in the future.

f   Make sure that your relationships with contacts follow any guidelines set by your organisation.

g   Establish boundaries of confidentiality between yourself and members of your personal networks.

h   Encourage clients to use your contacts and networks to increase the business opportunities open to them.

i   Keep up to date with your networks and contacts, and identify improved ways of using them.

j   Use business contacts to improve the quality of the business information service you provide.

k   Monitor the information and support given by other organisations to see if they can improve the business support services you provide.

l   Identify ways to improve the quality of information you get from contacts and network organisations.

m   Review the opportunities, costs and benefits of new contacts and networks.

What you need to know and understand

You need to know, understand and be able to apply each of the following.

Communication and interpersonal skills

1   How to listen and question.

2   How to exchange information.

3   The importance of maintaining client confidentiality.

4   Your colleagues' and contacts' interests, skills and preferred ways of working with you.

Networking

5   How to build personal contacts and form networks:

   o   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

   o   informally (for example, at a conference or through an on-line chat room).

6   How to identify where local networking opportunities exist and where there are gaps.

7   How to identify people and organisations that have the potential to benefit you and your clients.

8   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

9   The guidelines for providing support services set by your organisation or professional body about:

   o   maintaining confidentiality in different working environments;

   o   ethics, values and professional standards;

   o   equal opportunities, diversity and social inclusion; and

   o   using information management systems.

Evaluating networks

10 How to formally and informally monitor your own personal conduct.

11 How to compare the service provided by others.

12 The way your organisation networks with other organisations.

Personal behaviours

You need to show the following behaviours.

13 Engender co-operation by considering the perspective of others. [IiP2.2]

14 Build and maintain rapport over sustained periods. [IiP6.2]

15 Invite a two-way exchange of information and feedback with others. [IiP6.3]

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Links to other National Occupational Standards

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:

> AG18 Operate within networks

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

> A3. Develop your personal networks

6 Evaluate the quality of your own practice in business information

Summary

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.

What you need to show

You must make sure that your practice meets the following requirements.

a   Agree with clients that the business information you deliver to them is the service you agreed to deliver.

b   Alter your practice to take account of any changes in:

   o   your relationship with the client;

   o   their business;

   o   the way your service operates; and

   o   business information.

c   Describe and analyse the following, using valid evidence, at key points:

   o   your methodology;

   o   the relevance of the information you provided to the client and their business;

   o   improvements that need to be made, either by yourself or through involving others; and

   o   any problems that need to be resolved.

d   Monitor your practice regularly to make sure that it:

   o   meets or exceeds acceptable professional standards;

   o   meets all relevant regulations and organisational guidelines; and

   o   is always ethical and professional towards clients.

e   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.

f   Identify improvements you could make to your practice with current and future clients.

What you need to know and understand

You need to know, understand and be able to apply each of the following.

Performance monitoring techniques

1   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.

2   The reasons for monitoring your own performance.

3   The importance of establishing and applying valid and appropriate measures for evaluating your own performance.

4   The limitations of self-appraisal.

5   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).

6   How the type of client and their business needs can affect your performance.

Organisational factors

7   The performance goals set by your organisation or professional body.

8   The guidelines for evaluating services set by your organisation or professional body, about:

   o   the conditions and measures of economy, efficiency, effectiveness, value for money and quality;

   o   the effect of financial and time limits on services; and

   o   any local or regional priorities and problems.

Personal behaviours

You need to show the following behaviours.

9   Respect the client's need for information, commitment and confidentiality. [IiP1.3]

10 Prioritise and schedule to ensure optimum use of time and resource. [IiP5.2]

11 Strive to add value by achieving results in the best way. [IiP7.1]

12 Be committed to developing yourself to improve performance. [IiP7.2]

Links to other National Occupational Standards

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:

   AG15.1 Assess own contribution to the work of the service

   AG16.1 Evaluate own practice

   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:

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

7 Develop your own ability to provide business information

Summary

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

What you need to show

You must make sure that your practice meets the following requirements.

a   Evaluate, at appropriate intervals, the requirements of your professional role, taking account of the expectations and objectives of your organisation.

b   Maintain a level of knowledge and understanding that meets or exceeds market expectations about:

o   business practice for small businesses;

o   the range of business information and support that is available for typical problems in each key area;

o   trends, opportunities and developments in business practice that may affect small businesses; and

o   developments in business information practice that may affect the support you and your service provide.

o   use of information and communications technology

c   Change the way you work in line with any changes in business practice and how business information is provided.

d   Obtain the best available information, given the time and cost available.

e   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.

f   Adopt a reflective and evaluative approach to your practice, with reference to your own objectives and recognised professional standards

g   Plan your own training and development in line with your organisation's objectives and recognised continuing professional development (CPD).

h   Update your personal development plan to include new aims or achievements.

What you need to know and understand

You need to know, understand and be able to apply each of the following.

Ethical and professional considerations

1 You need to know and follow any guidelines provided by your organisation or professional body for business information services, about:

   o ethics, values and standards of good practice; and

   o client service and confidentiality.

Personal action planning

2 How to evaluate the current requirements of your work role and how the requirements may evolve in the future.

3 How to identify development needs to address any identified gaps between the requirements of your practice and your current knowledge, understanding and skills.

4 How to improve your understanding of business practice generally, or in particular areas.

5 How to set objectives which are SMART (Specific, Measurable, Achievable, Realistic and Time-bound).

6 How to plan actions.

7 The principles that underpin professional development.

8 The reasons for continuing professional development (CPD).

9 Your strengths and weaknesses.

10 Your values and career and personal goals and how to relate them to your job role and professional development.

11 What an effective development plan should contain and the length of time that it should cover.

12 The learning style(s) which work(s) best for you (eg Kolb experiential model; auditory, visual, tactile/kinaesthetic; collaborative/activist, individual/reflective, theory-based/theorist or practice-led/pragmatist).

13 How to update work objectives and development plans in the light of performance, feedback received, any development activities undertaken and any wider changes.

14 The way your organisation works (including resources, objectives, targets and training and development budget).

15 The objectives of your organisation for personal development (for example, opportunities, costs, timescales and targets and an annual personal development plan).

Improving your performance

16 The standards of performance set by your organisation or professional body.

17 How to evaluate your performance against the requirements of your work-role.

18 How to identify and use good sources of feedback on your performance.

19 How to monitor the quality of your work and your progress against requirements and plans.

20 How to develop your knowledge about and experience of providing business support.

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21 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).

22 Whether and how development activities have contributed to your performance.

Personal behaviours

You need to show the following behaviours.

23 Invite a two-way exchange of information and feedback with others. [IiP6.3]

24 Develop yourself to improve performance. [IiP7.2]

Links to other National Occupational Standards

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:

>   AG15.2 Develop oneself to achieve work requirements

>   AG16.2 Ensure continuing self-development

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

>   A1. Manage your own resources

>   A3. Develop your personal networks

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

Summary

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 SFEDI Introduction to Business Support suite of standards.

What you need to show

You need to have awareness or an appreciation of each of the following.

A Finances

i Working out financial requirements (for example forecasting resource requirements).

ii Sourcing of funding and what is needed to secure that funding.

iii Planning, monitoring and recording the cash flow in and out of a business, venture, or project.

iv Opening and managing a bank account.

v Understanding financial accounts.

vi Basic accounting terms and practices, and the basic rules regarding business taxation.

B Marketing, sales and customer service

i Conducting market research (for example to assess market conditions, to estimate potential customer base, and to identify competition).

ii Understanding the customers needs.

iii Delivering a good customer service and how you can measure and monitor it.

iv Understanding terms of business.

v Basic marketing and sales techniques (for example, advertising, promotion, pricing) and tools (for example, websites, mail shots, direct selling).

C Small business experience

i The emotional investment entrepreneurs make in their businesses.

ii The major functions needed in a small business and how they link to and support each other.

iii What it takes to successfully start and run a small business.

iv 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).

v The diverse capabilities required of entrepreneurs (for example, financial management, business acumen, and human resource skills).

vi The need for entrepreneurs to take risks.

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vii The recognition that running a business takes a lot of time, energy and commitment.

viii When and how to apply the principles of running a small business in practice.