

AA Develop your professional networks

Unit Summary

What is this unit about?

This unit 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 things 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.

Who is this unit for?

It is for all management consultants and business advisers.

Links with other units

Developing professional networks is particularly important for management consultants and business advisers in order to develop new and follow-on business, draw on specialist expertise and continuously develop knowledge and skills. It therefore links closely with *AB Establish and develop relationships with prospective clients*, *AD Develop and sustain relationships with colleagues and stakeholders* and *DB Continuously develop your practice*.

This unit is based on unit *A3 Develop your personal networks* from the Management and Leadership standards, and is designed to provide full credit transfer.

Skills

- Communicating
- Evaluating
- Influencing and persuading
- Information management
- Learning
- Networking
- Presenting Information
- Questioning
- Reflecting
- Risk management
- Setting objectives
- Time management

Standards for Management Consultancy and Business Advice

Outcomes of effective performance

You must be able to do the following:

1. Develop and maintain professional networks of contacts, which are appropriate to meet your current and future needs for information and resources
2. 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
3. Establish boundaries of confidentiality between yourself and members of your professional networks and where appropriate, develop guidelines for exchanging information and resources
4. Make active use of the information and resources gained through your professional networks
5. Introduce people and organisations with common interests to each other.

Behaviours which underpin effective performance

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 and mutual support
7. clarify own and others' expectations of relationships
8. model behaviour that shows respect, helpfulness and cooperation
9. keep promises and honour commitments
10. consider the impact of your own actions on others.

Standards for Management Consultancy and Business Advice

Knowledge and understanding

You need to know and understand the following:

Principles, methods, tools and techniques relating to

1. communication
2. establishing, developing and sustaining working relationships
3. information management and confidentiality
4. networking.

Industry/sector specific knowledge and understanding

1. relevant industry/sector-specific knowledge and information on trends and developments
2. relevant industry/sector-specific legal, regulatory, professional and ethical requirements.

Context specific knowledge and understanding

1. key political, economic, social, technological, legal and environmental factors
2. knowledge and information on trends and developments in your professional/specialist/technical area
3. relevant policies, procedures and requirements of your organisation
4. your own knowledge, skills and competence and the limits of these.

Standards for Management Consultancy and Business Advice

AB Establish and develop relationships with prospective clients

Unit Summary

What is this unit about?

This unit describes the sales process leading to securing contracts to deliver management consultancy and/or business advice 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.

Who is this unit for?

It is for management consultants and business advisers who identify and develop new business as part of their role.

Links with other units

It links closely with unit *AA Develop your professional networks*, which is part of the process of identifying prospective clients, and *AC Develop and sustain relationships with clients*, which describes the post-contract ongoing relationship with clients, including winning follow-on and repeat business.

Skills

- Building and sustaining relationships
- Communicating
- Evaluating
- Influencing and persuading
- Negotiating
- Networking
- Presenting Information
- Researching
- Setting objectives
- Thinking with a focus on clients.

Standards for Management Consultancy and Business Advice

Outcomes of effective performance

You must be able to do the following:

1. Identify organisations which could benefit from your services
2. Undertake background research to identify and evaluate:
 - a. the nature of the organisation, its activities and position in its environment
 - b. key decision-makers and influencers within the organisation
 - c. the organisation's needs which could be addressed by your services
 - d. the benefits to both parties of providing services to the organisation
 - e. the values of the organisation and how well these fit with your values and approach
 - f. any risks involved in working with the organisation and how these can be mitigated
3. Create opportunities to establish relationships with key decision-makers and influencers
4. 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
5. Build the confidence of key decision-makers and influencers by showing how your services have addressed relevant needs in other organisations
6. 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
7. Anticipate and respond effectively to questions and objections raised by key decision-makers and influencers
8. Clarify the detail of the objectives to be achieved and negotiate the services to be delivered and the terms of business
9. Agree a contract for the delivery of services which meets the requirements of both parties and complies with relevant legislation.

Standards for Management Consultancy and Business Advice

Behaviours which underpin effective performance

1. adopt communication media and styles appropriate to people and situations
2. present information clearly, concisely, accurately and in ways that promote understanding
3. reflect regularly on own and others' experiences, and use these to inform future actions
4. seek out and act on new opportunities
5. comply with, and ensure that others comply with, legal requirements, industry regulations, organisational policies and professional codes
6. act within the limits of your authority and competence
7. seek to understand people's needs and motivations
8. present self positively to others
9. identify clearly the value and benefits to people of a proposed course of action
10. deploy a range of legitimate strategies and tactics to influence people
11. show sensitivity to internal and external politics that impact on your own area of work
12. create opportunities to establish mutually beneficial relationships
13. clarify own and others' expectations of relationships
14. identify key stakeholders and their interests
15. take opportunities when they arise to achieve longer term aims
16. build clients' confidence in you and your services.

Standards for Management Consultancy and Business Advice

Knowledge and understanding

You need to know and understand the following:

Principles, methods, tools and techniques relating to

1. building consensus
2. communication
3. developing proposals
4. effective meetings
5. establishing, developing and sustaining working relationships
6. facilitation
7. identifying stakeholders and their diverse interests, needs, abilities and preferences
8. influencing
9. making presentations
10. negotiation
11. networking
12. promoting your services
13. research and investigation.

Industry/sector specific knowledge and understanding

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

Context specific knowledge and understanding

1. key political, economic, social, technological, legal and environmental factors
2. relevant policies, procedures and requirements of your organisation
3. your own knowledge, skills and competence and the limits of these.

Standards for Management Consultancy and Business Advice

AC Develop and sustain relationships with clients

Unit Summary

What is this unit about?

This unit covers the relationship between the management consultant/business adviser and the client – the key contact within the client organisation.

It involves both interpersonal skills of getting to know each other and building rapport, trust and confidence and well as process skills of ensuring regular communication, reporting and recording.

This unit covers the whole period from agreement of the contract to supply management consultancy/business advice services (which is dealt with in AB 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 management consultancy/business advice opportunities is also covered by this unit.

Who is this unit for?

It is for management consultants and business advisers who manage the relationship with the client as part of their role.

Links with other units

It links closely with unit *AB Establish and develop relationships with prospective clients*, which is about securing contracts with clients in the first place.

Skills

- Active listening
- Analysing
- Building and sustaining relationships
- Communicating
- Evaluating
- Information management
- Obtaining feedback
- Providing feedback
- Risk management
- Time management.

Standards for Management Consultancy and Business Advice

Outcomes of effective performance

You must be able to do the following:

1. 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
2. Establish with the client their overall expectations of the nature of the relationship and your respective roles
3. 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
4. Agree the purpose, format and timing of interactions with the client
5. 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
6. Act professionally at all times, using your personal style and competence to good effect
7. 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
8. Review the progress of work with the client at agreed times, discussing any problems, threats or concerns and agreeing how to address these
9. Maintain accurate records of interactions with the client
10. Maintain the confidentiality of the client organisation's data and respect their intellectual property
11. Evaluate with the client your respective perceptions of the work carried out, the objectives achieved and the quality of your relationship
12. Explore with the client further opportunities for you to provide services to meet identified needs.

Standards for Management Consultancy and Business Advice

Behaviours which underpin effective performance

1. keep people informed of plans and developments
2. encourage and welcome feedback from others and use this feedback constructively
3. clearly state what is required of others and hold them to account
4. keep confidential information secure
5. present self positively to others
6. create a sense of common purpose
7. work to develop an atmosphere of professionalism and mutual support
8. clarify own and others' expectations of relationships
9. model behaviour that shows respect, helpfulness and cooperation
10. keep promises and honour commitments
11. accept feedback from others without becoming defensive
12. take opportunities when they arise to achieve longer term aims
13. build clients' confidence in you and your services
14. adapt your approach according to clients' personalities, roles and levels of competence and authority
15. use appropriate facilitation principles, methods, tools and techniques effectively.

Standards for Management Consultancy and Business Advice

Knowledge and understanding

You need to know and understand the following:

Principles, methods, tools and techniques relating to

1. building consensus
2. communication
3. establishing, developing and sustaining working relationships
4. evaluation
5. facilitation
6. information management and confidentiality
7. promoting your services
8. providing feedback
9. quality assurance and continuous improvement
10. record-keeping.

Industry/sector specific knowledge and understanding

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

Context specific knowledge and understanding

1. key political, economic, social, technological, legal and environmental factors
2. knowledge and understanding of the type and stage of growth of the organisation you are working with
3. relevant policies, procedures and requirements of your organisation
4. your own knowledge, skills and competence and the limits of these.

Standards for Management Consultancy and Business Advice

AD Develop productive working relationships with colleagues and stakeholders

Unit Summary

What is this unit about?

This unit is about developing productive working relationships with colleagues, within your own organisation, client organisations and other organisations with which you work, and with identified stakeholders.

It 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 unit.

‘Colleagues’ are any people you are expected to work with, whether they are at a similar position or in other positions in terms of level of responsibility and authority. They include both people in your organisation and people you work with in client organisations.

‘Stakeholder’ refers to 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 client organisations.

Who is this unit for?

It is for all management consultants and business advisers.

Links with other units

This unit links closely with *AA Develop your professional networks* and *AB Establish and develop relationships with prospective clients*.

This unit is based on unit *D2 Develop productive working relationships with colleagues and stakeholders* from the Management and Leadership standards, and is designed to provide full credit transfer.

Skills

- Communicating
- Consulting
- Empathising
- Information management
- Managing conflict
- Monitoring
- Networking
- Obtaining feedback
- Presenting information
- Prioritising

Standards for Management Consultancy and Business Advice

- Problem solving
- Providing feedback
- Reviewing
- Valuing and supporting others

Standards for Management Consultancy and Business Advice

Outcomes of effective performance

You must be able to do the following:

1. Identify stakeholders and their potential impact on the activities and performance of your organisation or your client's organisation
2. Establish working relationships with relevant colleagues and stakeholders
3. Recognise and respect the roles, responsibilities, interests and concerns of colleagues and stakeholders
4. Provide colleagues and stakeholders with appropriate information to enable them to perform effectively
5. 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
6. Fulfil agreements made with colleagues and stakeholders and keep them informed
7. Advise colleagues and stakeholders promptly of any significant difficulties or where it will be impossible to fulfil agreements
8. 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
9. Monitor and review the effectiveness of working relationships with colleagues and stakeholders, seeking and providing feedback, in order to identify areas for improvement
10. Monitor wider developments in order to identify issues of potential interest or concern to stakeholders in the future and to identify new stakeholders.

Standards for Management Consultancy and Business Advice

Behaviours which underpin effective performance

1. adopt communication media and styles appropriate to people and situations
2. present information clearly, concisely, accurately and in ways that promote understanding
3. show respect for the views and actions of others
4. comply with, and ensure that others 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 and mutual support
10. keep promises and honour commitments
11. consider the impact of your own actions on others.

Standards for Management Consultancy and Business Advice

Knowledge and understanding

You need to know and understand the following:

Principles, methods, tools and techniques relating to

1. communication
2. conflict management
3. developing an atmosphere of professionalism and mutual respect
4. establishing, developing and sustaining working relationships
5. evaluation
6. identifying stakeholders and their diverse interests, needs, abilities and preferences
7. information management and confidentiality
8. providing feedback.

Industry/sector specific knowledge and understanding

1. relevant industry/sector-specific knowledge and information on trends and developments
2. relevant industry/sector-specific legal, regulatory, professional and ethical requirements.

Context specific knowledge and understanding

1. key political, economic, social, technological, legal and environmental factors
2. knowledge and information on trends and developments in your professional/specialist/technical area
3. relevant policies, procedures and requirements of your organisation
4. relevant policies, procedures and requirements of the client organisation
5. your own knowledge, skills and competence and the limits of these.

Standards for Management Consultancy and Business Advice

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

Unit Summary

What is this unit about?

This unit is about helping the client and key people within the client's organisation to understand their situation and to define more clearly the problem or opportunity they are trying to address through management consultancy/business advice.

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.

A key issue that the management consultant/business adviser will need to agree with the client is the level of their involvement. Does the management consultant/business adviser do the work, ie carry out the research and analysis and simply present findings to the client? Or does the management consultant/business adviser 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, thus gaining a closer understanding of the issues and, at the same time, learning new skills? This standard has been prepared in such a way as to allow for a range of different levels of involvement.

Who is this unit for?

It is for management consultants and business advisers 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.

Links with other units

It links closely with all other units in key area *B Work with the client to identify their needs and agree solutions*. It is also underpinned by unit *AC Develop and sustain relationships with clients*.

Skills

- Analysing
- Assessing
- Building consensus
- Communicating
- Evaluating
- Facilitating
- Information management
- Researching

Standards for Management Consultancy and Business Advice

- Scenario building.

Standards for Management Consultancy and Business Advice

Outcomes of effective performance

You must be able to do the following:

1. Work with the client to articulate the nature of the problem or opportunity they are trying to address with your support
2. 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
3. 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
4. Use appropriate tools and techniques to analyse, or help the client to analyse, the information gathered
5. Agree with the client and relevant key people within the client's organisation a common understanding of their circumstances in the broader environment
6. 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.

Standards for Management Consultancy and Business Advice

Behaviours which underpin effective performance

1. comply with, and ensure that others comply with, legal requirements, industry regulations, organisational policies and professional codes
2. keep confidential information secure
3. check the validity and reliability of information
4. work to develop an atmosphere of professionalism and mutual support
5. display a good understanding of how different factors in the work context relate to each other
6. maintain up-to-date information on the political, economic, social, technological and legal factors that impact on work
7. identify the range of elements in a situation and how they relate to each other
8. build a total and valid picture from restricted or incomplete data
9. articulate the assumptions made, and risks involved, in understanding a situation
10. facilitate common understanding and consensus
11. use appropriate facilitation principles, methods, tools and techniques effectively.

Standards for Management Consultancy and Business Advice

Knowledge and understanding

You need to know and understand the following:

Principles, methods, tools and techniques relating to

1. analysing organisational culture
2. business analysis
3. building consensus
4. communication
5. defining and agreeing roles and responsibilities
6. establishing, developing and sustaining working relationships
7. evaluation
8. facilitation
9. information management and confidentiality
10. research and investigation
11. reviewing organisational performance.

Industry/sector specific knowledge and understanding

1. relevant industry/sector-specific knowledge and information on trends and developments
2. relevant industry/sector-specific legal, regulatory, professional and ethical requirements.

Context specific knowledge and understanding

1. key political, economic, social, technological, legal and environmental factors
2. knowledge and information on trends and developments in your professional/specialist/technical area
3. knowledge and understanding of the type and stage of growth of the organisation you are working with
4. relevant policies, procedures and requirements of the client organisation
5. your own knowledge, skills and competence and the limits of these.

Standards for Management Consultancy and Business Advice

BB Work with the client to generate, evaluate and agree solutions

Unit Summary

What is this unit about?

This unit is about helping the client select an appropriate solution to address their problem or opportunity and win support for the selected solution from those involved in or affected by the implementation of the solution. 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.

A key issue that the management consultant/business adviser will need to agree with the client is the level of their involvement. Does the management consultant/business adviser do the work, ie 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? Or does the management consultant/business adviser 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, thus gaining a closer understanding of the issues and, at the same time, learning new skills? This standard has been prepared in such a way as to allow for a range of different levels of involvement.

Who is this unit for?

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

Links with other units

It links closely with all other units in key area *B Work with the client to identify their needs and agree solutions*. It is also underpinned by unit *AC Develop and sustain relationships with clients*.

Skills

- Analysing
- Assessing
- Building consensus
- Communicating
- Evaluating
- Facilitating
- Problem solving
- Risk management
- Thinking with a focus on clients.

Standards for Management Consultancy and Business Advice

Outcomes of effective performance

You must be able to do the following:

1. Agree with the client who is to be involved in generating, evaluating and agreeing solutions and when, taking account of their ability to generate options and influence the implementation of solutions
2. Work with the client to generate a broad range of possible options for addressing their problem or opportunity
3. Work with the client to identify and agree eligibility criteria which the options must meet in order to be considered for detailed evaluation
4. Work with the client to identify and agree appropriate criteria for detailed evaluation of the options
5. Work with the client to evaluate the advantages and disadvantages of the eligible options or combination of options against the agreed criteria
6. Work with the client to identify and evaluate the risks involved in the possible options and consider how these risks might be mitigated
7. Work with the client to select the option or combination of options which best meets the agreed criteria
8. Where no identified option satisfactorily meets the agreed criteria, help the client review and redefine the criteria
9. Work with the client to communicate the selected solution to those involved in or affected by its implementation, together with a clear rationale for its selection, the associated advantages, disadvantages and risks and any assumptions made
10. Work with the client to win support for the selected solution from those involved in or affected by its implementation, by impartially explaining the solution and its implications and effectively responding to any questions or concerns they may raise.

Standards for Management Consultancy and Business Advice

Behaviours which underpin effective performance

1. generate and recognise imaginative and innovative solutions
2. comply with, and ensure that others comply with, legal requirements, industry regulations, organisational policies and professional codes
3. act within the limits of your authority and competence
4. keep confidential information secure
5. identify clearly the value and benefits to people of a proposed course of action
6. work towards win-win solutions
7. develop plans to meet the priorities of policy makers
8. work to develop an atmosphere of professionalism and mutual support
9. identify the implications or consequences of a situation
10. articulate the assumptions made, and risks involved, in understanding a situation
11. facilitate common understanding and consensus
12. use appropriate facilitation principles, methods, tools and techniques effectively
13. support clients to plan, make and sustain improvements autonomously.

Standards for Management Consultancy and Business Advice

Knowledge and understanding

You need to know and understand the following:

Principles, methods, tools and techniques relating to

1. business analysis
2. building consensus
3. communication
4. defining and agreeing roles and responsibilities
5. developing proposals
6. establishing, developing and sustaining working relationships
7. evaluation
8. facilitation
9. influencing
10. making presentations
11. project management
12. risk management.

Industry/sector specific knowledge and understanding

1. relevant industry/sector-specific knowledge and information on trends and developments
2. relevant industry/sector-specific legal, regulatory, professional and ethical requirements.

Context specific knowledge and understanding

1. key political, economic, social, technological, legal and environmental factors
2. knowledge and information on trends and developments in your professional/specialist/technical area
3. knowledge and understanding of the type and stage of growth of the organisation you are working with
4. relevant policies, procedures and requirements of the client organisation
5. your own knowledge, skills and competence and the limits of these.

Standards for Management Consultancy and Business Advice

BC Work with the client to plan the implementation of improvements

Unit Summary

What is this unit about?

This unit is about helping the client to develop a detailed plan to implement the required improvements. It mirrors the project planning process but recognises that the management consultant/business adviser 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 improvements.

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.

Who is this unit for?

It is for management consultants and business advisers who work closely with clients to help them develop detailed plans for implementing improvements.

Links with other units

It links closely with all other units in key area *B Work with the client to identify their needs and agree solutions* and leads on to the units in key area *C Support the client in achieving sustainable improvements in performance*. It is also underpinned by unit *AC Develop and sustain relationships with clients*.

Skills

- Analysing
- Building consensus
- Communicating
- Evaluating
- Facilitating
- Monitoring
- Planning
- Respecting and acknowledging issues
- Risk management
- Setting objectives
- Thinking strategically
- Thinking with a focus on clients.

Standards for Management Consultancy and Business Advice

Outcomes of effective performance

You must be able to do the following:

1. Agree with the client who is to be involved in planning the implementation of improvements, taking account of their role in the implementation and their planning skills
2. Work with the client to define and agree clear aims and objectives, together with measures and criteria to evaluate whether these have been achieved
3. Work with the client to explore the range of possible implementation methods and select the most appropriate method or combination of methods
4. Work with the client to identify and evaluate obstacles to implementing the improvements and plan how to overcome these obstacles
5. Work with the client to identify and evaluate the risks involved and plan how these risks are to be mitigated
6. Work with the client to develop a detailed implementation plan, broken down into manageable work packages with identified resources, responsibilities and timescales
7. Work with the client to confirm the feasibility of the implementation plan by exposing it to those involved and other sources of expertise, if required
8. Work with the client to develop a suitable process for monitoring progress against the plan
9. Work with the client to develop a strategy for communicating the planned improvements and progress towards them, including opportunities for people to give feedback
10. Work with the client to win the support of those involved in or affected by the implementation plan, by impartially explaining the plan at an appropriate level of detail and effectively responding to any questions or concerns.

Standards for Management Consultancy and Business Advice

Behaviours which underpin effective performance

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 understanding
4. comply with, and ensure that others 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. use factual evidence to support arguments
9. work to develop an atmosphere of professionalism and mutual support
10. work towards a clearly defined vision of the future
11. facilitate common understanding and consensus
12. use appropriate facilitation principles, methods, tools and techniques effectively
13. support clients to plan, make and sustain improvements autonomously.

Standards for Management Consultancy and Business Advice

Knowledge and understanding

You need to know and understand the following:

Principles, methods, tools and techniques relating to

1. building consensus
2. change management
3. communication
4. defining and agreeing roles and responsibilities
5. establishing, developing and sustaining working relationships
6. facilitation
7. influencing
8. monitoring
9. objective setting
10. problem solving
11. project management
12. providing feedback
13. risk management.

Industry/sector specific knowledge and understanding

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

Context specific knowledge and understanding

1. knowledge and understanding of the type and stage of growth of the organisation you are working with
2. relevant policies, procedures and requirements of the client organisation
3. sources of advice, guidance and support
4. your own knowledge, skills and competence and the limits of these.

CA Support the client in implementing improvements

Unit Summary

What is this unit about?

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

The unit is designed to cover a very wide range of scenarios. The improvements being implemented may include, for example, a company's business plan, a targeted marketing campaign, the redesign of processes, the implementation of a new information and communication system, developing a new organisational culture, the acquisition or merger of two or more entities, the closure of a site and the redeployment of the workforce, the introduction of a new product line – the possibilities are endless and require the management consultant/business adviser to possess specific areas of technical expertise. However, the common thread which this unit describes is the facilitative approach of the management consultant/business adviser, supporting the client in achieving improvements, rather than taking personal responsibility for these improvements.

Who is this unit for?

It is for management consultants and business advisers who work closely with clients to support them in implementing improvements.

Links with other units

It links closely with all other units in key area *C Support the client in achieving sustainable improvements in performance* 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 unit *AC Develop and sustain relationships with clients*.

Skills

- Communicating
- Empowering
- Facilitating
- Leading by example
- Prioritising
- Respecting and acknowledging issues
- Thinking with a focus on clients
- Time management
- Valuing and supporting others.

Standards for Management Consultancy and Business Advice

Outcomes of effective performance

You must be able to do the following:

1. Agree with the client your role and responsibilities, and those of any other members of the consultancy/ advisory team, in the implementation
2. Fulfil your role and responsibilities within the implementation in line with your agreement
3. 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
4. Support the client in monitoring progress of the implementation, making appropriate recommendations to address emerging problems or opportunities
5. Work with the client to communicate progress to those involved or affected by the improvements and to respond effectively to any feedback received
6. Work with the client to access any required specialist expertise which are beyond your own competence or that of the consultancy/ advisory team.

Standards for Management Consultancy and Business Advice

Behaviours which underpin effective performance

1. find practical ways to overcome barriers to change
2. present information clearly, concisely, accurately and in ways that promote understanding
3. keep people informed of plans and developments
4. show respect for the views and actions of others
5. comply with, and ensure that others comply with, legal requirements, industry regulations, organisational policies and professional codes
6. act within the limits of your authority and competence
7. present self positively to others
8. identify clearly the value and benefits to people of a proposed course of action
9. use factual evidence to support arguments
10. show sensitivity to internal and external politics that impact on your own area of work
11. clarify own and others' expectations of relationships
12. work towards a clearly defined vision of the future
13. empower clients to take responsibility for their own actions
14. use appropriate facilitation principles, methods, tools and techniques effectively
15. support clients to plan, make and sustain improvements autonomously.

Standards for Management Consultancy and Business Advice

Knowledge and understanding

You need to know and understand the following:

Principles, methods, tools and techniques relating to

1. change management
2. communication
3. defining and agreeing roles and responsibilities
4. facilitation
5. monitoring
6. project management
7. providing feedback.

Industry/sector specific knowledge and understanding

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

Context specific knowledge and understanding

1. knowledge and understanding of the type and stage of growth of the organisation you are working with
2. relevant policies, procedures and requirements of the client organisation
3. sources of advice, guidance and support
4. your own knowledge, skills and competence and the limits of these.

Standards for Management Consultancy and Business Advice

CB Support the client in building capacity to implement and sustain improvements

Unit Summary

What is this unit about?

This unit is about supporting the client in building their capacity to implement improvements and be able to sustain these without continual reliance on support from external management consultants or business advisers.

It involves helping clients to identify, obtain and/or develop the range of resources – financial, physical, information and human – required to implement and sustain improvements. A major part of this is likely to be helping 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.

Who is this unit for?

It is for management consultants and business advisers who help clients to build their capacity to implement and sustain improvements.

Links with other units

It links closely with all other units in key area *C Support the client in achieving sustainable improvements in performance* 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 unit *AC Develop and sustain relationships with clients*.

Skills

- Communicating
- Empowering
- Facilitating
- Mentoring
- Motivating
- Providing feedback
- Thinking with a focus on clients
- Valuing and supporting others.

Standards for Management Consultancy and Business Advice

Outcomes of effective performance

You must be able to do the following:

1. Work with the client to identify the resources required to implement and sustain improvements
2. Work with the client to identify sources of finance and obtain any additional funds required
3. Work with the client to identify sources of supply and obtain any additional physical resources required
4. Work with the client to identify and obtain any information resources required and develop systems to manage this information efficiently and securely
5. 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
6. Work with the client to identify and obtain resources and support to develop any new knowledge, skills and competences required
7. Work with the client and members of the client's organisation to transfer relevant aspects of your expertise
8. Provide feedback to the client and members of the client's organisation designed to develop their confidence in their new competences and sustain improvements
9. Encourage the client and members of the client's organisation to take personal and collective responsibility for achieving and sustaining improvements
10. Provide advice and support to the client and members of the client's organisation in ways which encourage them to become autonomous and not dependent on you.

Standards for Management Consultancy and Business Advice

Behaviours which underpin effective performance

1. present information clearly, concisely, accurately and in ways that promote understanding
2. encourage and support others to take decisions autonomously
3. give feedback to others to help them improve their performance
4. freely share learning with others who can benefit from it
5. comply with, and ensure that others comply with, legal requirements, industry regulations, organisational policies and professional codes
6. articulate a realistic vision that generates excitement, enthusiasm and commitment
7. show sensitivity to internal and external politics that impact on your own area of work
8. clarify own and others' expectations of relationships
9. maintain up-to-date information on the political, economic, social, technological and legal factors that impact on work
10. anticipate likely future scenarios based on a realistic analysis of trends and developments
11. empower clients to take responsibility for their own actions
12. use appropriate facilitation principles, methods, tools and techniques effectively
13. support clients to plan, make and sustain improvements autonomously.

Standards for Management Consultancy and Business Advice

Knowledge and understanding

You need to know and understand the following:

Principles, methods, tools and techniques relating to

1. change management
2. communication
3. enabling the client to take responsibility for improvements and work autonomously
4. facilitation
5. identifying gaps in knowledge, skills and competences
6. information management and confidentiality
7. providing feedback
8. resource management
9. transferring knowledge.

Industry/sector specific knowledge and understanding

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

Context specific knowledge and understanding

1. relevant policies, procedures and requirements of the client organisation
2. your own knowledge, skills and competence and the limits of these.

CC Support the client in measuring performance and evaluating improvements

Unit Summary

What is this unit about?

This unit is about supporting the client to measure performance in those areas in which improvements are required and to develop and use cost-effective systems to monitor and evaluate performance improvements.

Measurement and evaluation of performance are important aspects of all management consultancy/business advice assignments. They are necessary for accurate analysis and diagnosis of problems and opportunities and underpin improvement interventions by providing data for monitoring progress and evaluating whether the anticipated results have been achieved.

Who is this unit for?

It is for management consultants and business advisers who help clients to measure performance in critical areas and evaluate whether required improvements have been achieved.

Links with other units

This unit underpins unit *CA Support the client in implementing improvements* and all the units in key area *B Work with the client to identify their needs and agree solutions*. It may also be used as a standalone unit when the management consultant/business adviser is asked to provide specific support to help the organisation measure and evaluate its performance in critical areas.

Skills

- Analysing
- Benchmarking
- Communicating
- Evaluating
- Facilitating
- Information management
- Monitoring
- Setting objectives
- Thinking with a focus on clients.

Standards for Management Consultancy and Business Advice

Outcomes of effective performance

You must be able to do the following:

1. Work with the client to identify the key measures of performance relevant to the area in which improvements are required
2. Work with the client to develop cost-effective systems for gathering and analysing data for key measures of performance, making best use of existing systems and data sources
3. Work with the client to gather and analyse data about past, current and expected future performance against these key measures of performance
4. Where relevant, work with the client to benchmark their performance with other comparable organisations and/or departments
5. Work with the client to develop and agree with those involved realistic targets for key measures of performance and interim targets to be achieved at agreed points
6. Work with the client to monitor performance against key measures of performance at agreed points
7. Work with the client to analyse and understand performance data and evaluate whether planned improvements have been achieved
8. Work with the client to agree with those involved how performance is to be sustained and/or further improved.

Standards for Management Consultancy and Business Advice

Behaviours which underpin effective performance

1. comply with, and ensure that others comply with, legal requirements, industry regulations, organisational policies and professional codes
2. act within the limits of your authority and competence
3. keep confidential information secure
4. analyse and structure information to develop knowledge that can be shared
5. present self positively to others
6. work to develop an atmosphere of professionalism and mutual support
7. model behaviour that shows respect, helpfulness and cooperation
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 and legal factors that impact on work
10. work towards a clearly defined vision of the future
11. use appropriate facilitation principles, methods, tools and techniques effectively
12. support clients to plan, make and sustain improvements autonomously.

Standards for Management Consultancy and Business Advice

Knowledge and understanding

You need to know and understand the following:

Principles, methods, tools and techniques relating to

1. business analysis
2. benchmarking performance
3. communication
4. evaluation
5. facilitation
6. information management and confidentiality
7. monitoring
8. objective setting
9. quality assurance and continuous improvement
10. reviewing organisational performance.

Industry/sector specific knowledge and understanding

1. relevant industry/sector-specific knowledge and information on trends and developments
2. relevant industry/sector-specific legal, regulatory, professional and ethical requirements.

Context specific knowledge and understanding

1. key political, economic, social, technological, legal and environmental factors
2. knowledge and information on trends and developments in your professional/specialist/technical area
3. knowledge and understanding of the type and stage of growth of the organisation you are working with
4. relevant policies, procedures and requirements of the client organisation.

Standards for Management Consultancy and Business Advice

DA Work to professional, ethical and quality standards

Unit Summary

What is this unit about?

It is essential that management consultants and business advisers observe professional and ethical standards and work to agreed quality standards at all times.

This unit is about 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 management consultants and business advisers interact with clients and other with whom they work. This unit, therefore, also covers these relationships, including observing professional boundaries and confidentiality and handling conflicts between yourself and others with whom you work.

Who is this unit for?

It is fundamental unit for all management consultants and business advisers.

Links with other units

This unit is transversal and underpins all the other units in the Standards for Management Consultancy and Business Advice.

Skills

- Balancing competing needs and interests
- Communicating
- Evaluating
- Information management
- Leading by example
- Managing conflict
- Providing feedback
- Reviewing
- Self-assessment
- Valuing and supporting others.

Standards for Management Consultancy and Business Advice

Outcomes of effective performance

You must be able to do the following:

1. Identify and comply with the professional and ethical standards and codes of practice that apply to your role
2. 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, adviser or client, if required
3. Establish measurable quality standards for your work and evaluate – with the support of the client, if appropriate – the extent to which you are meeting these
4. Establish your role and the roles of others with whom you work and maintain clear professional boundaries
5. Encourage those with whom you work to work in a professional and mutually supportive manner, including modelling the behaviour you are seeking to encourage
6. Communicate appropriately with those with whom you work, ensuring that they have the information they require in order to work effectively
7. Treat information with the required level of confidentiality
8. 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
9. 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, adviser or client, if required.

Standards for Management Consultancy and Business Advice

Behaviours which underpin effective performance

1. present information clearly, concisely, accurately and in ways that promote understanding
2. give feedback to others to help them improve their performance
3. comply with, and ensure that others comply with, legal requirements, industry regulations, organisational policies and professional codes
4. acknowledge when own interests are in conflict with common goals
5. identify and raise ethical concerns
6. keep confidential information secure
7. make appropriate information and knowledge available promptly to those who have a right to it
8. work to develop an atmosphere of professionalism and mutual support
9. clarify own and others' expectations of relationships
10. take timely action to resolve disagreements
11. recognise when there are conflicts, acknowledge the feelings and views of all parties, and redirect people's energy towards a common goal
12. set achievable objectives for self and give a consistent and stable performance.

Standards for Management Consultancy and Business Advice

Knowledge and understanding

You need to know and understand the following:

Principles, methods, tools and techniques relating to

1. communication
2. conflict management
3. defining and agreeing roles and responsibilities
4. developing an atmosphere of professionalism and mutual respect
5. establishing, developing and sustaining working relationships
6. information management and confidentiality
7. providing feedback
8. quality assurance and continuous improvement.

Industry/sector specific knowledge and understanding

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

Context specific knowledge and understanding

1. relevant policies, procedures and requirements of your organisation
2. sources of advice, guidance and support.

Standards for Management Consultancy and Business Advice

DB Continuously develop your practice

Unit Summary

What is this unit about?

This unit 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. The first is 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. The second dimension is professional updating – keeping abreast of best practice in the provision of management consultancy/business advice, your specialism(s) and the sector(s) in which you operate.

Reflection on your own practice and 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.

Who is this unit for?

It is fundamental unit for all management consultants and business advisers.

Links with other units

This unit is transversal and underpins all the other units in the Standards for Management Consultancy and Business Advice.

Skills

- Benchmarking
- Evaluating
- Learning
- Obtaining feedback
- Planning
- Reflecting
- Self-assessment
- Setting objectives.

Standards for Management Consultancy and Business Advice

Outcomes of effective performance

You must be able to do the following:

1. Evaluate, at appropriate intervals, the current and future requirements of your professional role
2. 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
3. Identify trends, developments and emerging best practice in:
 - the provision of management consultancy/business advice
 - your area(s) of specialist expertise
 - the sector(s) in which you operate
4. Identify the learning styles which work best for you and take these into account when identifying, planning and undertaking development activities
5. Identify any gaps between the current and future requirements of your professional role and your current knowledge and skills
6. 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
7. Undertake the activities identified in your development plan
8. 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
9. Get regular, objective and valid feedback on your performance from those who are in a position to provide it
10. 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.

Standards for Management Consultancy and Business Advice

Behaviours which underpin effective performance

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.

Standards for Management Consultancy and Business Advice

Knowledge and understanding

You need to know and understand the following:

Principles, methods, tools and techniques relating to

1. benchmarking performance
2. communication
3. evaluation
4. identifying gaps in knowledge, skills and competences
5. learning and development
6. providing feedback
7. quality assurance and continuous improvement.

Industry/sector specific knowledge and understanding

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

Context specific knowledge and understanding

1. knowledge and information on trends and developments in your professional/specialist/technical area
2. relevant policies, procedures and requirements of your organisation
3. sources of advice, guidance and support
4. your own knowledge, skills and competence and the limits of these.