



Skills Broker

Endorsed Programme

35 hours

Learning Outcomes for this Programme

The learner will:

- Assess whether the ethical and professional standards expected of business advisors are met
- Plan and implement own personal development
- Develop own professional networks
- Review and improve business support services offered by self or employers
- Interact effectively with clients
- Deliver business support that is right for each client
- Deliver a business support services that meets the needs of your organisation
- Encourage clients to develop their confidence, knowledge and skills
- Help clients to review their business
- Help clients embrace change
- Support clients when action planning to improve their business
- Promote the contribution improved skills make to business performance
- Develop networks of training providers
- Help clients assess training providers offers
- Broker deals with training providers
- Develop clients' abilities to broker their own deals

This programme is made up of five sections

Section 1	Personal Professional Development	7 hours
Section 2	Building Business Support Relationships	7 hours
Section 3	Delivering Business Support	7 hours
Section 4	Increasing Capacity for Skills Development	7 hours
Section 5	Brokering Skills Development	7 hours

Duration

- 35 guided development and assessment hours

Assessment methods

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

Title:	Personal Professional Development	Section 1	
Learning outcomes The learner will	Assessment criteria The learner can (in an organisation with which the learner is familiar)		
1. Assess whether the ethical and professional standards expected of business advisors are met	1.1	Review own work practices in order to assess whether they meet the ethical and professional standards expected of business advisers, and identify improvements that could be made to own work practices	
2. Plan and implement own personal professional development	2.1	Investigate own continuing professional development needs, taking into account changes in own work roles and operating environment	
	2.2	Devise and implement personal development plans based on identified needs	
3. Develop own professional networks	3.1	Assess the quality of own current networks and identify how they could be improved	
	3.2	Implement plans for improving own professional networks, and identify the outcomes of these efforts	
4. Review and improve business support services offered by self or employers	4.1	Use performance monitoring techniques to review the business support services offered by self or employers	
	4.2	Identify and implement opportunities for improving business support services offered by self or employers	
Additional information about the unit			
Links to NOS: Based on Units 5-8 of SFEDI NOS for Business Support (approved 2006)			
Unit aim(s)			
To equip business advisers with the skills to manage their continuing personal professional development.			

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



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

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

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



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

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

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



Title:	Increasing capacity for skills development	Section 4	
Learning outcomes The learner will	Assessment criteria The learner can (in an organisation with which the learner is familiar)		
1. Promote the contribution improved skills make to business performance	1.1	Use appropriate diagnostic tools to identify skills gaps which when filled will add value to clients' organisations.	
	1.2	Explain the business case for skills improvement at all levels in clients' organisations.	
2. Develop networks of training providers	2.1	Keep your knowledge of training providers up-to-date	
	2.2	Develop new contacts to better meet the needs of clients.	
Additional information about the unit			
Links to NOS: Based on Skills Brokerage Standard for Train to Gain Skills Brokers			
Unit aim(s)			
To equip business advisers with the skills to increase take up of skills development			

	Indicative content:
1	<ul style="list-style-type: none"> • The aspirations of clients for their business. • Ways to challenge and encourage clients to review their business aspirations. • The added value role that skills can play in meeting business aspirations for a number of different business scenarios. • What clients' skills needs mean in practice. • How planning tools may identify wider skills needs that those initially identified by the client • The operational cycle of the business in relation to training delivery. • Basic understanding of HR practices relating to role of appraisals in identifying skills needs, evaluating training outcomes for employees, pay scales, structures and sources of pay information, equality and diversity, contracts of employment and staff consultation processes. • The benefits of adding to skills rather than merely accrediting existing skills. •
2	<ul style="list-style-type: none"> • Sources of information, advice & guidance, including LSC training provider guide for employers, Business Link branded IDB service, Learndirect information services, Train to Gain Broker Resources website, nextsteps and other information, advice and guidance services, Regional supplier databases, Job Centre Plus, Professional Associations, for example, CIM, ACCA, CMI, ILM, and Union Learning Representatives • Development solutions, including Skills for Life / Essential Skills / ESOL, Leadership and management provision, Informal learning and peer based networks, Coaching and mentoring services, e-learning and distance learning, Investors in People, Apprenticeships, NVQs, and Foundation Degrees. • Part time FE courses for 16-18 year olds • HE Provision • Welfare to Work programmes • Short courses e.g. ICT, project management, health and safety • Named contacts in local (Regional) area, including Further Education colleges, Independent training providers (including work based training providers), Higher Education Institutions, Ufi-learndirect learning centres and Job Centre Plus services. • Leading training providers as recognised by Inspection Grades, CoVE status, Quality Mark, Explicit employer linkages / endorsement and National Training Awards. • Train to Gain Programme including Funding packages, Wage compensation for those businesses with less than 50 employees, Eligibility of employers, individuals, courses and types of qualifications, Processes for accrediting prior learning, Differences between vocational, academic and professional qualifications, Key Skills, Main awarding bodies, Progression routes through qualifications eg NVQ 2,3, 4 and Learning pathways e.g. how does an employee become qualified as a civil engineer? • Role of the Adult Learning Inspectorate including Understanding inspection process, Reading and interpreting reports, Assessment process for learners, • Purpose, role and expertise of Learning and Skills Councils, Regional Skills Partnerships, Regional Development Agencies, Business Link, Sector Skills Councils and how to access specialist sectoral knowledge, Ufi/learn direct, Professional Membership institutes and Job Centre Plus.

- Economic business and sectoral needs of a local (business) economy including Regional skills priorities and Sector Skills Agreements.
- LSC funding framework including Fee remission policies and learner support funding and Completion, achievement and success rates.
- Other local workforce development offers for each Funding and Eligibility.
- Basic understanding of statutory entitlements relating to the National minimum wage, Health and Safety, equal opportunities, disability discrimination, employer liability insurance, working time directive, statutory leave, statutory time off for study 16 – 18 year olds.
- How to build relationships with a range of training providers including FE, HE and independent.
- Why it is important to continuously seek feedback from colleagues on the performance of local training providers in meeting employer needs.
- How to network with colleagues and others to identify new training providers
- Ways to identify new training providers and enable them to join LSC funded framework.
- How matched investment by clients' organisations can increase leverage for public funds.
- The culture and values of clients when drawing up potential training providers for them to work with.



Title:	Brokering skills development	Section 5	
Learning outcomes The learner will	Assessment criteria The learner can (in an organisation with which the learner is familiar)		
1. Help clients assess training providers' offers	1.1	Make sure clients have access to and can interpret key information about training providers.	
	1.2	Present options to clients with comparable summaries of cost and service.	
2. Broker deals with training providers	2.1	Make sure training providers put together responsive and flexible packages that offer value for money and add real value in meeting the skills needs of clients businesses.	
	2.2	Monitor provider delivery, ensuring that key milestones are met.	
3. Develop clients' abilities to broker their own deals	3.1	Help clients develop evaluation frameworks to review the impact on their organisation of investing in skills.	
	3.2	Help clients build confidence and capacity to evaluate and broker their own skills improvement solutions.	
Additional information about the unit			
Links to NOS: Based on Skills Brokerage Standard for Train to Gain Skills Brokers			
Unit aim(s)			
To equip business advisers with the skills to broker training for their clients			

	Indicative content:
1	<ul style="list-style-type: none"> • What information about training providers can be obtained and used including: <ul style="list-style-type: none"> • Inspection reports • Quality standards • References • Ways to effectively summarise information about training providers • How to make training providers respond promptly to requests for information, presentations and subsequent queries. • Ways to objectively take up references • Interpret the language of qualifications for clients.
2	<ul style="list-style-type: none"> • Ways to use planning tools when drawing up a client delivery plan. • Ways to incorporate a risk analysis within a delivery plan. • Propose actions to minimise risk. • The value of any public subsidy provided and how to make the client aware of it. • The impact of LSC funding frameworks and inspection regimes on training provider behaviour. • Ways to build trust between training providers and clients • How to remain impartial and accountable to the client.
3	<ul style="list-style-type: none"> • Ways to devise an evaluation framework to review the impact of skills development plans • Ways that evaluation frameworks can be linked into the wider strategy of a business. • The impact on the bottom line of evaluation frameworks. • The steps taken to pull together and execute a deal with a training provider • The skills needed to critically evaluate proposals from training providers and objectively take up references.