Level 7 Diploma in Professional Business and Enterprise Support Services

Regulator	Ofqual
Qualification Reference Number	601/5496/2
Qualification Start Date	1 February 2015
Last Date for Registration	30 November 2025
Available Age Ranges	Pre-16 ✗
	16-18 ✗
	19+ ✓
Total Qualification Time	TBC
Guided Learning	102 hours

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Every effort has been made to ensure that the information contained in this publication is true and accurate at the time of publication. However, SFEDI Enterprises t/a SFEDI Awards strives to continually develop and improve our qualifications and, as such, there may be occassions where changes are required. SFEDI Enterprises t/a SFEDI Awards does not accept liability for any loss or damage arising from the use of the information contained within this publication.

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About This Qualification

This qualification is for those who wish to develop the broad base of high level skills, knowledge and understanding needed by business advisers.

It is specifically for those working in the business support sector that help entrepreneurs who are starting up and developing businesses to review their progress, action plan improvements, implement changes to their existing or prospective business and develop their business skills and knowledge.

Learners must be within a business support role for a minimum of 12 months prior to undertaking this qualification in order to ensure that they have the required experience to evidence the requirements of the qualification.

The role must not be construed as work experience or instigated as a vehicle solely for the delivery of this qualification.

Learners should also possess communication skills sufficient to allow them to address the assessment requirements of the qualification.

Assessment should be through the production of a portfolio of evidence presented for assessment by a suitably qualified Assessor. Mandatory assessment methods, where applicable, can be seen within the individual unit details.

Those who complete this qualification may wish to work towards our other Level 5 qualifications in Business and Enterprise Support in order to broaden their skills base into other support roles.

They may wish to also progress to the Level 7 qualifications in order to recognise their higher and broader skills and knowledge base whilst progressing through their career paths.

Qualification Overview

Qualification Structure	4 mandatory units and 1 optional unit
Assessor Qualification Required (please check details of appropriate Assessor qualifications later within this document)	Yes for workplace assessment
IQA Qualification Required (please check details of appropriate IQA qualifications later within this document)	Yes

Unit Title	Reference Number	Mandatory/ Optional	Unit Level	Credit Value	Guided Learning (hours)
Develop a Professional Business Support Relationship with a Client	R/506/8614	M	7	8	24
Analyse and Support the Needs of a Client	Y/506/8615	M	7	7	18
Support a Client to Source, Access and Evaluate Business Support Opportunities to Meet Strategic Requirements	D/506/8616	M	7	7	12
Evaluate and Develop Own Practices in the Delivery of Professional Business and Enterprise Support Services	L/506/8613	M	6	6	10
Support a Client Through Professional Enterprise Consultancy Support	L/506/9521	O	7	10	38
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About SFEDI Awards

SFEDI Awards was founded in 2007 creating the first dedicated Awarding Organisation specialising in business enterprise and business support, a standing still enjoyed to this day within the UK.

Our qualifications are built on the extensive research that underpins the SFEDI® National Occupational Standards and the expertise of the Institute of Enterprise and Entrepreneurs, the UKs only professional Institute dedicated to enterprise.

With our qualifications having been designed to be flexible to meet the wide range of demand within enterprise learning, we recognise the needs of industry to develop enterprising and entrepreneurial individuals to support the sustainability and growth of business and the wider community.

As the only dedicated UK Awarding Organisation, SFEDI Awards designs and develops a range of bespoke business enterprise and business support qualifications that are delivered through members of our both UK based and international delivery network.

Within this we also develop and publish best practice materials and resources to support the delivery of our qualifications to a high standard to ensure that learners gain all they require when either starting or progressing their enterprise journey.

Customer Feedback

We are always keen to understand learners and centres thoughts on the content of all aspects of our qualifications and welcome feedback. This can be done by emailing us at customerservices@sfediawards.com and indicate in the header field, 'Customer Feedback'.

The Regulated Qualifications Framework (RQF)

The Regulated Qualifications Framework (RQF) is the vehicle for regulating qualifications within England and vocational qualifications within Northern Ireland. The framework provides a single, simple system for cataloguing all qualifications regulated by Ofqual by both level and size.

Qualifications on the Regulated Qualifications Framework (RQF) have both a level and a size allocated to them in order to support individuals in making an informed choice about the most appropriate qualification for them.

Each RQF qualification title contains the following:

- ✓ The level of the qualification (from entry level to Level 8)
- ✓ The size of the qualification (Award/Certificate/Diploma)
- ✓ Details indicating the content of the qualification

Each qualification has a published structure setting out what must be achieved by an individual in order to demonstrate their knowledge and skills in order to meet the required standard as part of the delivery and certification process.

Qualification Level

The level of a qualification relates to the complexity and difficulty associated with the development of the knowledge and skills of a particular subject.

Qualification levels start at Entry Level and then progress from Level 1 through to Level 8

Qualification Size

The size of a qualification is an indication of the total amount of time a qualification will take to complete indicated using the term Total Qualification Time (TQT)

Qualification sizes are expressed using the terms Award, Certificate or Diploma

Total Qualification Time (TQT)

Total Qualification Time (TQT) provides a guide of the average time it takes to complete a qualification broken down into two types of activity:

- ✓ **Guided Learning (GL)** - made up of activities completed by the learner under the direct instruction or supervision of a lecturer, supervisor or tutor whether through physical presence or electronic means provided as a measurement of time in hours
- ✓ **Total Qualification Time (TQT)** - made up of the Guided Learning (GL) plus all other time taken in preparation, study or any other form of participation in education or training but not under the direct supervision of a lecturer, supervisor or tutor provided as a measurement of time in hours

TQT is a new system used by the Regulator and will be phased in up to 31 December 2017.

SFEDI Directory

The SFEDI Directory is central to the drive towards a more competitive enterprise landscape with increased employment opportunities, improved productivity and, ultimately, greater prosperity regionally and nationally.

It is designed and maintained to guarantee that advisers, coaches, consultants, mentors and trainers can share their up-to-date, relevant qualifications and valuable experience with the businesses that need them.

By undertaking this qualification an individual is eligible to apply to join the SFEDI Directory enabling them to take advantage of the following benefits:

- ✓ Be part of **the** most comprehensive, nationwide listing of accredited and experienced business support professionals
- ✓ Association with the proven and trusted national and international business and enterprise support brand, SFEDI
- ✓ A Directory used by public and private sector organisations searching for accredited and experienced business support professionals nationally
- ✓ Ideal whether supporting those starting, growing or even exiting a business
- ✓ Access to view and apply to opportunity postings in a secure system only available to accredited and experienced business support professionals

Further details about the SFEDI Directory can be found at www.sfedidirectory.co.uk

Institute of Enterprise and Entrepreneurs (IOEE)

The Institute of Enterprise and Entrepreneurs (IOEE) is the UK's only Institute dedicated to 'learning by doing' for anyone thinking about starting or running their own business and those who support them. By joining the IOEE it enables likeminded entrepreneurs to come together to share knowledge, experience and skills.

By undertaking this qualification an individual is eligible to receive 1 years study membership* of the Institute enabling them to take advantage of the following benefits:

- ✓ Regular information on what's happening through the IOEE Enterprise and Mentoring Monthly including case studies of people just like them who are becoming more enterprising
- ✓ Opportunity to access the national government Start Up Loan initiative through the IOEE and Start Up Loan strategic partnership
- ✓ Opportunities to meet other business owners in the online communities who are happy to share how they have been there, done it, got the t-shirt and continue to wear it!
- ✓ Enterprise resources including videos and articles to enhance their understanding of enterprise and enterprise support
- ✓ The chance to meet other members through Meet a Mentor and networking events
- ✓ A chance to compare notes with other entrepreneurs and business support professional through the online groups and forums
- ✓ A chance to promote themselves to other IOEE members through the IOEE profile page

*1 years free study membership of the IOEE for SFEDI Awards learners aged 18 years and over and undertaking an eligible qualification

Further details of the Institute can be found at www.ioee.uk

What Does SFEDI Awards Expect?

To offer this qualification an organisation is required to hold SFEDI Awards centre status and also apply for qualification approval. The latest information on the SFEDI Awards website can be viewed by clicking here.

As we operate as a regulated Awarding Organisation we hold high regard to the standards of professional service we provide to centres and, in turn, the service centres deliver to their learners.

To support this we operate a number of policies and procedures to ensure that we always operate in a fair and open manner.

Published on the SFEDI Awards website are policies and procedures covering the following areas:

- Appeals
- Complaints
- Continuous Professional Development (CPD)
- Customer Service Policy
- Direct Claims Status
- Equal Opportunities
- Invoicing
- Qualification Titling in Marketing and Logo Usage
- Malpractice and Maladministration
- Privacy
- Quality Bulletins
- Reasonable Adjustments
- Recognised Prior Learning
- Registration and Certification
- Retention of Records
- Whistleblowing

We are continually updating the policies and procedures available to view through the website so please keep checking back to make sure you have the latest information available. You can see the latest versions of all of these policies by clicking here.

Learner Registration and Certification

Our online registration and certification system, Registr8, allows you to process information efficiently and quickly. You can register and certificate learners, produce reports, retrieve and view customer information and also access invoices and monitoring reports.

Learners should be registered with SFEDI Awards within 4 weeks of commencing the programme or qualification. It is the responsibility of the centre to obtain a Unique Learner Number (ULN), from the Learner Records Service, and accurately enter this into the Registr8 system in order that learner achievements can be recorded on their Personal Learning Record (PLR).

SFEDI Awards centres must use the Registr8 system to indicate where a learner has successfully completed the qualification and/or units within it. Where a centre holds Direct Claims Status (DCS) certificates will be issued, where this is not the case an External Quality Assurer will contact the centre to arrange sampling.

How We Monitor Qualification Delivery

We pride ourselves in the continued quality of the delivery of our qualifications through our delivery network and in order to ensure that this is maintained we conduct both folder and systems monitoring activities.

We provide two monitoring activity reviews per year where a member of our Monitoring Team will review your organisation's activities in order to provide feedback and support on your qualification delivery. If you think you need a visit simply contact our Customer Service Team on customerservices@sfediawards.com or 0845 224 5928 and we will be more than happy to discuss your requirements with you.

You will be provided with a report on completion of the monitoring activity feeding back on your organisation's current performance against the SFEDI Awards Core Principles and planning activities to help support continuous improvement and the sharing of best practice.

In order to inform future monitoring activities, SFEDI Awards makes use of a risk rating system that provides an organisation with a rating determined by the findings of monitoring activities.

SFEDI Awards also conducts additional monitoring activities in order to provide support and ensure the continued quality of the delivery of our qualifications including:

- ✓ Customer Satisfaction Surveys
- ✓ Mystery Shopping
- ✓ Qualification Consultations and Reviews
- ✓ Thematic Reviews

Each of these allows us to ensure that the qualifications we provide and the way they are provided continues to support the development of the enterprise skills agenda and a truly entrepreneurial community.

Direct Claims Status (DCS)

We operate a system called Direct Claims Status (DCS) providing you with the ability to certificate learners' achievements without the need for external monitoring activity taking place first. It is awarded at qualification level and not centre level and can be awarded and removed dependent on the consistency, quality and integrity of the qualification delivery within the centre.

Where a centre holds DCS a monitoring officer from SFEDI Awards will sample a selection of the folders worked on and completed since the last external monitoring activity.

Where a centre does not hold DCS for a qualification it will require an external monitoring activity to take place prior to being able to gain certification for learners.

Internal Quality Assurance

Internal Quality Assurance will be completed by the SFEDI Awards centre and involves sampling of learners' documents and assessment decisions to ensure standardisation across Delivery/Assessment staff and consistency and fairness of assessment following Awarding Organisation requirements.

SFEDI Awards provides quality assurance documentation that can be used by the centre for recording quality assurance decisions. We have provided templates which can be used within the annex of this document or alternatively they, and other templates, can be accessed on the SFEDI Awards website. These documents are provided for the centre to use but, if the centre wishes to develop their own recording material, the minimum requirements must be met to ensure quality assurance practices are not disadvantaged. Minimum requirements can be accessed on the SFEDI Awards website.

Delivery/Assessment

SFEDI Awards centre staff should work with learners to ensure they understand the nature of the qualification and assessment approach. Both centre staff and the learner should agree at the beginning of the assessment journey how the assessment will be undertaken and what each can expect from the other, including arranging times and dates for learning and assessment activity and support. The Delivery/Assessment staff will follow the principles of plan, judge and feedback as described within professional standards.

SFEDI Awards provides assessment documentation that can be used by the centre for recording the planning, judging and feeding back of assessments. We have provided templates which can be used within the annex of this document or alternatively they, and other templates, can be accessed on the SFEDI Awards website. These documents are provided for the centre to use but, if the centre wishes to develop their own recording material, the minimum requirements must be met to ensure assessment practices are not disadvantaged. Minimum requirements can be accessed on the SFEDI Awards website.

Delivery/Assessment/Quality Assurance Staff Requirements

All Assessors must have the necessary competence in the subject matter of the qualification and the necessary competence in the assessment procedures to be used. They must also hold or be working towards the appropriate qualification from the table below dependent on whether assessment is being carried out in the workplace or a different training environment. Assessors must also hold occupational competence for the units that have been selected to the level and content of the unit.

Qualification Title	Workplace Assessment	Other Training Environment, eg. classroom
D32/33	✓	✓
A1/A2	✓	✓
Level 3 Award in Understanding the Principles and Practices of Assessment	✗	✗
Level 3 Award in Assessing Competence in the Work Environment	✓	✗
Level 3 Award in Assessing Vocationally Related Achievement	✗	✓
Level 3 Certificate in Assessing Vocational Achievement	✓	✓

All Quality Assurance staff must have the necessary competence in the subject matter of the qualification and the necessary competence in the IQA procedures to be used. They must also hold or be working towards the appropriate qualification from the table below. IQAs must also hold occupational competence for the units that have been selected to the level and content of the unit.

Qualification Title	Sufficient to Carry Out the IQA Role
D34	✓
V1	✓
Level 4 Award in Understanding the Internal Quality Assurance of Assessment Processes and Practice	✗
Level 4 Award in Internal Quality Assurance of Assessment Processes and Practice	✓
Level 4 Certificate in Leading the Internal Quality Assurance of Assessment Processes and Practice	✓

Assessment Methods

The following provides examples and explanations of the most common forms of assessment methods. Other methods can be used by centres to enable learners to demonstrate they meet the standards as detailed within the units.

Initial Assessment

Centres should complete an initial assessment with learners prior to the commencement of the qualification to ensure that the subject matter and level of the qualification is the most appropriate to meet their needs.

This initial assessment should also form part of the planning process so that the most appropriate methods of assessment are chosen to suit the learner and their learning environment whilst also meeting any mandatory assessment methods the qualification may contain.

Mandatory Assessment Methods

Some units may require mandatory forms of assessment to be completed. SFEDI Awards will make note in each unit whether mandatory assessment methods apply. If it states that there are no mandatory assessment methods, a suggestion of the types of assessments that could be used will be provided.

Expert Witness/Witness Testimony

These are provided by external people as the Delivery/Assessment staff cannot possibly be present at all times when a learner completes a task that could be used as evidence. The testimony will be expected to detail who and what the activity entailed and where the activity took place. A template for the collection of a witness testimony has been provided later within this document.

Observation

This is a recorded report of an observed activity to show who and what the activity entailed and where the activity took place. It is normally recorded by the Delivery/Assessment staff and should be planned for. On occasions the opportunity may arise for a naturally occurring observation but this must not be seen as common practice. A template for the collection of an observation has been provided later within this document.

Product Evidence

This is a work product, for example a letter or research, that has been produced which can support the evidencing of performance. When using this form of evidence it is important to ensure that confidentiality is adhered to and no information is provided that may compromise this. It may be appropriate to reference the location of product evidence within a professional discussion so that, if the quality assurer wishes to view it, then they can request a copy. A template for the collection of product evidence has been provided later within this document.

Professional Discussion

This is a recorded report of a discussion between the learner and the Delivery/Assessment staff and should give real examples, where possible, of activity completed. It is normally recorded by the Delivery/Assessment staff and should be planned for. A Professional Discussion is not a question and answers session and should be led by the learner. A template for the collection of a professional discussion has been provided later within this document.

Recognition of Prior Learning

Prior Learning can form part of the assessment process where the learner is able to demonstrate that they meet the assessment requirements for a unit through knowledge, understanding or skills that they already possess. In this instance the learner must provide evidence to show that the assessment criteria have been met.

The Assessor will make a professional judgement about the evidence presented, which could be in a variety of forms, including, a statement or professional discussion to explain what prior activity has taken place and how this links to the standards to be achieved. The assessment process for Recognition of Prior Learning should be rigorous, reliable and fair.

For full details of how recognition of prior learning can be used within SFEDI Awards qualifications please see the SFEDI Awards website.

Simulation

In exceptional circumstances evidence from simulation can be used to complement the primary evidence drawn from business enterprise activities. Simulation should only occur where:

✓   The candidate would otherwise be precluded from providing the necessary evidence for demonstrating they met the requirements of the standards because of the nature of their business or business idea

Simulated activities should match as closely as possible those that occur in a real business environment. This is particularly important where these activities and their outcomes are being assessed to provide evidence to demonstrate the candidate is meeting the requirements of the standards. If simulation is to be used, prior agreement as to the arrangements must be sought from SFEDI Awards prior to the assessment taking place.

Activities should take place in a realistic working environment that:

✓   Is based on business enterprise activities, events, challenges and markets
✓   Includes a comprehensive range of demands, activities, constraints and challenges typical of those that would be met in real a business enterprise
✓   Gives candidates access to facilities, advice and support that would be normal for the business enterprise activity, event or type of challenge represented
✓   Places candidates under pressures of time, resources and access to support that would be normal in a business enterprise
✓   Is organised and managed as would a real business enterprise situation
✓   Is subject to normal workplace controls regarding health and safety, equal opportunities, and codes of conduct

Authentication of Learner Evidence

Centres must have knowledge and certainty that all assessments undertaken are entirely the work of the learner being assessed and a statement of authenticity signed by the learner and Assessor must be present within the portfolio. A template to record this statement has been provided later within this document.

Feedback

Feedback must be provided to the learner for each assessment carried out and recorded on the assessment documentation and should feed into both assessment planning and the completion of progress reviews. The feedback should provide the learner with information relating to:

- ✓ Whether the planned assessment has been completed
- ✓ The quality of the assessment completed
- ✓ What has been covered within the standards
- ✓ What is required to be completed to move the qualification forward

Templates to support the planning and feedback functions have been provided later within this document.

Data Protection and Confidentiality

Many of the potential assessment methods that could be used in order to support the delivery of a qualification may lead to the inadvertent collection of data and confidential information, for example where a piece of product evidence has been gathered.

In these instances both the learner and the centre should take all reasonable steps to ensure that data protection and confidentiality legislation and policies are followed and data that should not be released within the public domain is protected.

Protection of Minors in Evidence Collection

Where video or photography is used in order to collect evidence for the completion of a qualification, care should be taken where minors (those under 18) are included within. Both the learner and the centre has responsibility for ensuring child protection legislation and policies are followed and that minors are not put at risk.

If a minor is included within video and/or photographic evidence it is the responsibility of the centre to inform the learner of:

- ✓ The requirement to obtain the permission from the minor's parent or guardian prior to collecting the evidence
- ✓ The purpose of the restrictions that are in place when making use of video and/or photographic evidence
- ✓ The requirement to retain evidence for the purpose of quality assurance and the timeframe that evidence will be retained
- ✓ The requirement to store video and/or photographic evidence securely
- ✓ The associated child protection legislation

Unit Structure

The following demonstrates the structure of units within SFEDI Awards qualifications:

Unit Reference Number   **Unit Title**

Unit Status   This will show whether the unit is mandatory or optional

Unit Level   Level allocated to the unit on the RQF unit databank

Credit Value   Credit value assigned to the unit

Guided Learning   Learning hours required to complete the unit under the guidance of a lecturer, supervisor or tutor whether through physical presence or electronic means

Unit Overview and Main Outcomes

This will provide you with the rationale for the unit and the knowledge and skills the learner will develop by undertaking the unit.

Assessment and Grading of This Unit

This will provide you with the grading structure for the unit and also will list the mandatory and/or suggested assessment methods for use in the completion of the unit.

Unit Content

This will provide you with the learning outcomes and assessment criteria that the learner must provide evidence for in order to complete the unit.

Learning Outcome - The learner will:	Assessment Criterion - The learner can:
This shows what the learner needs to know, understand or do	This sets out the criteria the learner must meet and provide evidence against in order to complete the unit

Qualification Unit Details

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The following pages contain the units that are contained within this qualification

Qualification Unit Details

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L/506/8613   Evaluate and Develop Own Practices in the Delivery of Professional Business and Enterprise Support Services

Unit Status	Mandatory
Unit Level	6
Credit Value	6
Guided Learning	10 hours

Unit Overview and Main Outcomes

This unit contains 4 learning outcomes which will support the learner to be able to:

- ✓ Be able to assess personal and professional skills required to deliver business and enterprise support services
- ✓ Be able to implement a personal development plan
- ✓ Be able to develop own professional networks
- ✓ Be able to evaluate the impact of personal development and network development activities on the quality of provision of business and enterprise support services

Assessment and Grading of This Unit

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

In the completion of this unit the learner must provide a personal development plan that clearly shows the development activities that they plan to undertake in order to meet the requirements of their job role. This plan should then be implemented, reviewed and updated to show ongoing personal development activity planning.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony

Unit Content

	Learning Outcome - The learner will:		Assessment Criterion - The learner can:
1	Be able to assess personal and professional skills required to deliver business and enterprise support services.	1.1	Apply techniques to identify and assess the knowledge, behaviours, skills and ethical and professional standards required to deliver business and enterprise support services.
		1.2	Use appropriate methods to carry out a personal audit on own knowledge, behaviours, skills and ethical and professional standards against those identified to deliver business and enterprise support services.
		1.3	Take into account feedback from colleagues/stakeholders/clients to identify further areas of development.
2	Be able to implement a personal development plan.	2.1	Apply appropriate techniques to identify own preferred learning style.
		2.2	Construct a personal development plan that meets knowledge, behaviour, skill and ethical and professional standards development requirements identified in the personal audit.
		2.3	Conduct the identified development activities.
3	Be able to develop own professional networks.	3.1	Evaluate the quality of own professional networks to support the delivery of high quality business and enterprise support services.
		3.2	Identify improvements that could be made to own professional networks.
		3.3	Include in personal development plan activities to be completed in order to improve own professional networks.
		3.4	Conduct the identified development activities.
4	Be able to evaluate the impact of personal development and network development activities on the quality of provision of business and enterprise support services.	4.1	Evaluate the impact of the personal and network development activities on the quality of the business and enterprise support service provided to own clients.
		4.2	Identify further development activities to continually improve the business support service provided.

SFEDI°AWARDS THE AWARDING ORGANISATION FOR ENTERPRISE

R/506/8614   Develop a Professional Business Support Relationship With a Client

Unit Status	Mandatory
Unit Level	7
Credit Value	8
Guided Learning	24 hours

Unit Overview and Main Outcomes

This unit contains 7 learning outcomes which will support the learner to be able to:

- ✓ Understand the policies and codes of ethics that impact on business and enterprise support interventions
- ✓ Be able to establish relationships with clients
- ✓ Be able to manage communications with clients
- ✓ Be able to optimise the impact of the client's personality, competence, organisational role and level of authority
- ✓ Be able to build mutual trust and respect with clients through feedback
- ✓ Be able to manage conflicts with clients
- ✓ Be able to support the client to measure the impact of the support intervention

Assessment and Grading of This Unit

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

Evidence for this unit must be based on a minimum of three separate client interventions, a minimum of one must be observed and the remaining two can be through professional discussion and/or case study. The same three separate client interventions can be used across multiple units within this qualification.

The following provides examples of assessment methods that could be used to generate further evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony

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Unit Content

	Learning Outcome - The learner will:		Assessment Criterion - The learner can:
1	Understand the policies and codes of ethics that impact on business and enterprise support interventions.	1.1	Identify policies and codes of ethics for business and enterprise support that are set by own organisation and/or a professional body that impact on the development of professional relationships with a client.
		1.2	Analyse the implications of policies and codes of ethics for business and enterprise support that are set by own organisation and/or a professional body for developing professional relationships with a client.
2	Be able to establish relationships with clients.	2.1	Establish with clients the scope of the support to be provided.
		2.2	Establish with clients the respective roles and responsibilities of the support professional and the client.
3	Be able to manage communications with clients.	3.1	Establish the purpose, format and timing of interactions with the client.
		3.2	Implement processes and methods to optimise interactions with clients.
		3.3	Record the outcomes of interactions with clients concisely and accurately where appropriate.
4	Be able to optimise the impact of the client's personality, competence, organisational role and level of authority.	4.1	Assess the client's personality, competence, organisational role and level of authority.
		4.2	Evaluate the impact the client's personality, competence, organisational role and level of authority may have on the business support intervention(s).
		4.3	Implement approaches to optimise the impact of the client's personality, competence, organisational role and level of authority on the business support intervention(s).
5	Be able to build mutual trust and respect with clients through feedback.	5.1	Implement methods for providing constructive feedback to clients.
		5.2	Implement methods for encouraging clients to provide constructive feedback.
		5.3	Utilise feedback in ways that build mutual trust and respect with clients.

6	Be able to manage conflicts with clients.	6.1	Appraise risks of conflicts with clients.
		6.2	Assess the impact of potential conflicts on relationships with clients.
		6.3	Implement approaches to resolve conflicts with clients.
		6.4	Evaluate the benefits of involving third parties in resolving conflicts with clients.
7	Be able to support the client to measure the impact of the support intervention.	7.1	Establish with the client, the purpose and benefits of carrying out the evaluation.
		7.2	Support the client to identify indicators which can be used to measure the impact of the support intervention on their business.
		7.3	Support the client to identify an appropriate method of measuring the impact of the support intervention.
		7.4	Evaluate with the client the quality of the relationship, the work carried out and the objectives achieved.
		7.5	Establish with the client any future actions to be carried out.

Y/506/8615   Analyse and Support the Needs of a Client

Unit Status	Mandatory
Unit Level	7
Credit Value	7
Guided Learning	18 hours

Unit Overview and Main Outcomes

This unit contains 6 learning outcomes which will support the learner to be able to:

- ✓ Understand what is meant by business and enterprise support
- ✓ Understand the policies and codes of ethics that impact on business and enterprise support interventions
- ✓ Be able to identify the needs of a client
- ✓ Be able to agree support services with a client
- ✓ Be able to work with a client to explore a business opportunity
- ✓ Be able to manage the relationship with a client

Assessment and Grading of This Unit

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

Evidence for this unit must be based on a minimum of three separate client interventions, a minimum of one must be observed and the remaining two can be through professional discussion and/or case study. The same three separate client interventions can be used across multiple units within this qualification.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony

Unit Content

	Learning Outcome - The learner will:		Assessment Criterion - The learner can:
1	Understand what is meant by business and enterprise support.	1.1	Explain what is meant by business and enterprise support.
		1.2	Describe the types of business and enterprise support available to those starting their own business or developing an existing business.
		1.3	Critically evaluate the similarities and differences between the types of business and enterprise support available to those starting their own business or developing an existing business.
		1.4	Evaluate how business and enterprise support interventions add value to local economic development within their local context and networks.
2	Understand the policies and codes of ethics that impact on business and enterprise support interventions.	2.1	Identify policies and codes of ethics for business and enterprise support that are set by own organisation and/or a professional body that impact on the development of professional relationships with a client.
		2.2	Analyse the implications of policies and codes of ethics for business and enterprise support that are set by own organisation and/or a professional body for developing professional relationships with a client.
3	Be able to identify the needs of a client.	3.1	Encourage the client to explain clearly what they want to achieve from considering starting their own business or developing an existing business.
		3.2	Work with the client to evaluate and explain their current personal situation and/or the business opportunity using appropriate diagnostic tools and measures.
4	Be able to agree support services with a client.	4.1	Identify what is needed and expected by the client as a source of support.
		4.2	Communicate what can be delivered to support the client in moving from opportunity to action.
		4.3	Agree the support activities that will be provided to the client.

5	Be able to work with a client to explore a business opportunity.	5.1	Work with the client to assist them in understanding the positive and negative consequences associated with not being able to progress the business opportunity.
		5.2	Help the client to obtain the information they need to review feasibility of the business opportunity including the ideas of other appropriate stakeholders.
		5.3	Challenge the client to set practical, specific and, where appropriate, ambitious personal and business objectives for the near, medium and long term in order to take forward the business opportunity.
		5.4	Help the client identify obstacles to progressing the business opportunity.
		5.5	Work with the client to draw up appropriate strategies and, where appropriate, contingency plans to deal with any potential obstacles to progressing the business opportunity.
		5.6	Work with the client to assist them in understanding what may be involved personally and in business terms in achieving the results they would like.
		5.7	Work with the client to identify other stakeholders which need to be engaged to move from opportunity to action.
		5.8	Work with the client to draw up an engagement strategy to interact effectively with the stakeholders identified.
		5.9	Work with the client in a way that allows them to develop analytical and problem-solving skills for themselves.
6	Be able to manage the relationship with a client.	6.1	Identify and recognise when the relationship with the client is going well.
		6.2	Identify when the relationship with the client is not working and take appropriate action.
		6.3	Identify when the needs and requirements of the client are outside own experiences and area of expertise.
		6.4	Work with the client to introduce others when own experiences and expertise are unable to address the needs and requirements of the client.

D/506/8616

Support a Client to Source, Access and Evaluate Business Support Opportunities to Meet Strategic Requirements

Unit Status	Mandatory
Unit Level	7
Credit Value	7
Guided Learning	12 hours

Unit Overview and Main Outcomes

This unit contains 4 learning outcomes which will support the learner to be able to:

- ✓ Understand the role and purpose of organisational policies when developing relationships with clients
- ✓ Be able to support a client in the sourcing of business and enterprise support services to meet their identified strategic business needs
- ✓ Be able to support a client to access business and enterprise support services
- ✓ Be able to support a client to evaluate the effectiveness of business and enterprise support services against the strategic requirements identified

Assessment and Grading of This Unit

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

Evidence for this unit must be based on a minimum of three separate client interventions, a minimum of one must be observed and the remaining two can be through professional discussion and/or case study. The same three separate client interventions can be used across multiple units within this qualification.

The following provides examples of assessment methods that could be used to generate further evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony

Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand the role and purpose of organisational policies when developing relationships with clients.	1.1	Identify policies and codes of ethics for business and enterprise support that are set by own organisation and/or a professional body that impact on the development of professional relationships with third parties.
		1.2	Analyse the implications of policies and codes of ethics for business and enterprise support that are set by own organisation and/or a professional body for developing professional relationships with third parties.
2	Be able to support a client in the sourcing of business and enterprise support services to meet their identified strategic business needs.	2.1	Work with the client to specify their strategic requirements for business and enterprise support.
		2.2	Identify a range of service providers who are able to meet the strategic needs and requirements of the client in moving from opportunity to action.
		2.3	Provide a comprehensive framework to assist the client in comparing the different features and costs of the business and enterprise support services provided by others.
		2.4	Summarise the meaning of quality standards in order to help the client reach a decision about the business and enterprise support services provided by others.
		2.5	Advise the client on appropriate methods for selecting and using other providers of business and enterprise support services including any criteria that have to be met if public funding is to be used.
		2.6	Enable the client to develop and use criteria for selecting suppliers that are most likely to provide them with the services that they require and provide best value.
		2.7	Identify opportunities where investments by the client can leverage access to other business and enterprise support services.
		2.8	Propose ways by which the client can fund the use of business and enterprise support services including potential sources of finance most appropriate to their needs.
		2.9	Ensure that at all times the responsibility for selecting and using providers of business and enterprise support is retained by the client.

		3.1	Ensure that business and enterprise support providers respond promptly to own and/or clients requests for information.
		3.2	Help to build trust between the client and providers of business and enterprise support services.
		3.3	Act as a translator between the client's needs and the 'language' of business and enterprise support services provided by others.
		4.1	Agree with the client how often to review progress of the business and enterprise support relationship and in how much detail.
		4.2	Develop with the client appropriate measures of the performance of the support provided.
		4.3	Encourage the client to review their progress against their identified strategic requirements that led to the business and enterprise support engagement.
		4.4	Encourage the client to assess the impact and value added of the support intervention on their strategic requirements.
		4.5	Work with the client to identify any concerns or problems with the support programme.
		4.6	Investigate any problems with the support provided and take action to solve problems within own area of responsibility or direct the client to the appropriate people, where the problem lies outside the limits of own responsibility.

L/506/9521   Support a Client Through Professional Enterprise Consultancy Support Services

Unit Status	Optional
Unit Level	7
Credit Value	10
Guided Learning	38 hours

Unit Overview and Main Outcomes

This unit contains 7 learning outcomes which will support the learner to be able to:

- ✓ Understand what is meant by enterprise consultancy
- ✓ Understand the policies and codes of ethics that impact on enterprise consultancy support interventions
- ✓ Be able to agree the process of enterprise consultation with a client
- ✓ Be able to deliver a professional enterprise consultancy support service
- ✓ Be able to optimise the impact of a client's personality, competence, organisational role and level of authority on the enterprise consultancy intervention
- ✓ Be able to support a client to measure the impact of the enterprise consultancy support intervention
- ✓ Be able to refer a client to appropriate sources of information, advice and guidance

Assessment and Grading of This Unit

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

Evidence for this unit must be based on a minimum of three separate client interventions, a minimum of one must be observed and the remaining two can be through professional discussion and/or case study.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony

Unit Content

	Learning Outcome - The learner will:		Assessment Criterion - The learner can:
1	Understand what is meant by enterprise consultancy	1.1	Explain what is meant by enterprise consultancy
		1.2	Describe the sources of enterprise consultancy available to those starting their own business or developing an existing business
		1.3	Critically evaluate the advantages and disadvantages of each of the sources identified
		1.4	Evaluate how enterprise consultancy support interventions add value to local economic development
		1.5	Analyse the characteristics required in order to operate as an effective enterprise consultant
2	Understand the policies and codes of ethics that impact on enterprise consultancy support interventions	2.1	Identify policies and codes of ethics for enterprise consultancy that are set by own organisation and/or a professional body
		2.2	Analyse the implications of policies and codes of ethics for enterprise consultancy that are set by own organisation and/or a professional body for developing professional consultancy relationships with a client
3	Be able to agree the process of enterprise consultation with a client	3.1	Ensure the client understands own role as a consultant and how it differs to other business support roles
		3.2	Agree with the client the goals and rules of the consultancy process and how long the relationship may last including specific stages and any costs involved in work that would be undertaken
4	Be able to deliver a professional enterprise consultancy support service	4.1	Take time to understand what the client wants to achieve by engaging with the consultancy service
		4.2	Demonstrate an understanding of the situation of the client including the business opportunities, their business model, the market, the people and the internal and external influences
		4.3	Recommend a programme of action that best meets the needs of the client
		4.4	Agree with the client how and when to review progress against the programme of action
		4.5	Suggest to the client how they may enhance the effectiveness of the way they do things and the associated benefits and costs
		4.6	Suggest practical options that are viable and add

			value to the client at a personal and/or business level
		4.7	Present new information to the client in a way that they are able to understand and that is relevant to their needs
		4.8	Deliver a consultancy service that is up to date, relevant and adds value to the client at a practical level
		4.9	Deliver a consultancy service in a way that motivates the client to move from opportunity to action
		4.10	Make sure the client maintains control of decisions about professional services they purchase from own service offering
		4.11	Keep up to date and accurate records of contact with the client where appropriate
		4.12	Follow the code of ethics for consultancy that are set by self, own organisation and/or a professional body
		4.13	Present a positive image of enterprise consultancy to the client throughout the process
5	Be able to optimise the impact of a client's personality, competence, organisational role and level of authority on the enterprise consultancy intervention	5.1	Evaluate the impact the client's personality, competence, organisational role and level of authority may have on the consultancy intervention(s)
		5.2	Implement approaches to optimise the impact of the client's personality, competence, organisational role and level of authority on the consultancy intervention(s)
6	Be able to support a client to measure the impact of the enterprise consultancy support intervention	6.1	Support the client to identify indicators that can be used to measure the impact of the enterprise consultancy intervention(s) on their business
		6.2	Support the client to identify an appropriate method of measuring the impact of the enterprise consultancy service intervention(s)
7	Be able to refer a client to appropriate sources of information, advice and guidance	7.1	Identify when the client would benefit from further support interventions where own skills and knowledge can no longer meet requirements
		7.2	Refer the client to relevant sources of information, advice and guidance when it is required

J/506/9520   Support Clients Through Professional Enterprise Training Support Services

Unit Status	Optional
Unit Level	7
Credit Value	10
Guided Learning	38 hours

Unit Overview and Main Outcomes

This unit contains 7 learning outcomes which will support the learner to be able to:

- ✓ Understand the types of enterprise training services that are available to those starting their own business or developing an existing business
- ✓ Understand the policies and codes of ethics that impact on enterprise training delivery
- ✓ Be able to develop an appropriate enterprise training services
- ✓ Be able to deliver an engaging and appropriate enterprise training session
- ✓ Be able to optimise the impact of clients personality and competence on an enterprise training session
- ✓ Be able to refer a client to appropriate sources of information, advice and guidance
- ✓ Be able to reflect and improve own and others enterprise training practices

Assessment and Grading of This Unit

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

A minimum of one training intervention must be observed and the learner must also provide a scheme of work and a minimum of one example delivery plan for the enterprise training session(s) they have developed.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony

Unit Content

	Learning Outcome - The learner will:		Assessment Criterion - The learner can:
1	Understand the types of enterprise training services that are available to those starting their own business or developing an existing business	1.1	Explain what is meant by enterprise training
		1.2	Explain the types of enterprise training services available to those starting their own business or developing an existing business
		1.3	Critically evaluate the similarities and differences between the types of enterprise training services available to those starting their own business or developing an existing business
		1.4	Evaluate how enterprise training services add value to local economic development
		1.5	Analyse the characteristics required in order to operate as an effective enterprise trainer
2	Understand the policies and codes of ethics that impact on enterprise training delivery	2.1	Identify policies and codes of ethics for enterprise training services that are set by own organisation and/or a professional/governmental body
		2.2	Analyse the implications of policies and codes of ethics for enterprise training services that are set by own organisation and/or a professional/governmental body for developing training services
3	Be able to develop an appropriate enterprise training service	3.1	Identify and evaluate different learning processes available to use within a training environment
		3.2	Analyse the role and use of initial and diagnostic assessment in agreeing individual learning goals
		3.3	Identify a range of learning resources available to use within a training environment
		3.4	Identify how technology based learning and delivery can be used
		3.5	Select appropriate delivery methods that meet the aims and objectives of the enterprise learning service
		3.6	Design a scheme of work and teaching and learning plans that meet the aims and individual needs of all clients which develops competencies, skills and knowledge of those considering starting their own business and/or owner managers of existing businesses
		3.7	Design appropriate extension activities to take into account different learning abilities of the clients
4	Be able to deliver an engaging and appropriate enterprise training session	4.1	Use examples of own and other appropriate experiences with which the clients can identify

		4.2	Empathise with the challenges and opportunities encountered by the clients
		4.3	Build solutions into the training experience to assist in addressing identified challenges and opportunities
		4.4	Adapt the structure, content and approaches to delivery during the training experience as appropriate
		4.5	Deliver the training in a way that motivates the clients to move from opportunity to action
		4.6	Deal appropriately with situations with the clients where the appropriate information to respond to questions is not available
		4.7	Create a positive training experience which is welcoming, participative, non-judgemental and 'can do' focused
		4.8	Reflect on when moving into a coaching, mentoring, consultancy or advisor role and adapt delivery appropriately
		4.9	Complete required reports and records with appropriate levels of information
5	Be able to optimise the impact of clients personality and competence on an enterprise training session	5.1	Assess clients personality and competence and its impact on the enterprise training session(s)
		5.2	Implement approaches to optimise the impact of clients personality and competence on the enterprise training session(s)
6	Be able to refer a client to appropriate sources of information, advice and guidance	6.1	Identify when clients would benefit from further support interventions where own skills and knowledge can no longer meet requirements
		6.2	Suggest practical options that are viable and add value to clients at a personal and/or business level
		6.3	Refer clients to other business support providers to address specific areas of action
7	Be able to reflect and improve own and others enterprise training practices	7.1	Identify opportunities for learners to provide feedback to inform inclusive practice when reviewing and improving the enterprise training activities
		7.2	Summarise how to share best practice with others involved in the enterprise training service
		7.3	Facilitate discussions with colleagues to gain solutions to particular issues that clients have been unable to overcome whilst engaging with the enterprise training service

		7.4	Plan and conduct improvements to the enterprise training service based on feedback from learners and stakeholders and experiential knowledge exchange with peers

R/506/9519   Support a Client Through Professional Enterprise Mentoring Support

Unit Status	Optional
Unit Level	7
Credit Value	10
Guided Learning	38 hours

Unit Overview and Main Outcomes

This unit contains 7 learning outcomes which will support the learner to be able to:

- ✓ Understand what is meant by enterprise mentoring support
- ✓ Understand the policies and codes of ethics that impact on enterprise mentoring support interventions
- ✓ Be able to ensure a client understands the role of an enterprise mentor
- ✓ Be able to provide a professional enterprise mentoring support service
- ✓ Be able to optimise the impact of a client's personality, competence, organisational role and level of authority on an enterprise mentoring intervention
- ✓ Be able to support a client to measure the impact of an enterprise mentoring support intervention
- ✓ Be able to refer a client to appropriate sources of information, advice and guidance

Assessment and Grading of This Unit

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

Evidence for this unit must be based on a minimum of three separate client interventions, a minimum of one must be observed and the remaining two can be through professional discussion and/or case study.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony

Unit Content

	Learning Outcome - The learner will:		Assessment Criterion - The learner can:
1	Understand what is meant by enterprise mentoring support	1.1	Explain what is meant by enterprise mentoring
		1.2	Describe the sources of enterprise mentoring available to those starting their own business or developing an existing business
		1.3	Critically evaluate the advantages and disadvantages of each of the sources identified
		1.4	Evaluate how enterprise mentoring support interventions add value to local economic development
		1.5	Analyse the characteristics required in order to operate as an effective enterprise mentor
2	Understand the policies and codes of ethics that impact on enterprise mentoring support interventions	2.1	Identify policies and codes of ethics for enterprise mentoring that are set by own organisation and/or a professional body
		2.2	Analyse the implications of policies and codes of ethics for enterprise mentoring that are set by own organisation and/or a professional body for developing professional enterprise mentoring relationships with a client
3	Be able to ensure a client understands the role of an enterprise mentor	3.1	Ensure the client understands own role as an enterprise mentor and how it differs to other business support roles
		3.2	Agree with the client the goals and rules of the enterprise mentoring process and how long the relationship may last
4	Be able to provide a professional enterprise mentoring support service	4.1	Encourage the client to explain clearly what they want to achieve through comparing their needs with current personal and business practices
		4.2	Recommend a programme of action which best meets the needs of the client
		4.3	Encourage the client to take responsibility for setting their own goals and to make their own decisions on actions to take in order to achieve those goals
		4.4	Encourage the client to develop the confidence, understanding and skills needed to meet their personal and business objectives
		4.5	Present new information to the client in a way that they are able to understand and that is relevant to their needs
		4.6	Recognise when giving business advice and no longer mentoring and act appropriately

		4.7	Keep up to date and accurate records of contact with the client where appropriate
		4.8	Follow the code of ethics for enterprise mentoring that are set by self, own organisation and/or a professional body
		4.9	Present a positive image of enterprise mentoring to the client throughout the mentoring process
5	Be able to optimise the impact of a client's personality, competence, organisational role and level of authority on an enterprise mentoring intervention	5.1	Evaluate the impact the client's personality, competence, organisational role and level of authority may have on the enterprise mentoring intervention(s)
		5.2	Implement approaches to optimise the impact of the client's personality, competence, organisational role and level of authority on the enterprise mentoring intervention(s)
6	Be able to support a client to measure the impact of an enterprise mentoring support intervention	6.1	Support the client to identify indicators that can be used to measure the impact of the enterprise mentoring support intervention(s) on their business
		6.2	Support the client to identify an appropriate method of measuring the impact of the enterprise mentoring support intervention(s)
7	Be able to refer a client to appropriate sources of information, advice and guidance	7.1	Identify when the client would benefit from further support interventions where own skills and knowledge can no longer meet requirements
		7.2	Suggest practical options that are viable and add value to the client at a personal and/or business level
		7.3	Refer the client to other business support providers to address specific areas of action

R/506/9522   Support a Client Through Professional Business and Enterprise Coaching Support Services

Unit Status	Optional
Unit Level	7
Credit Value	10
Guided Learning	38 hours

Unit Overview and Main Outcomes

This unit contains 7 learning outcomes which will support the learner to be able to:

- ✓ Understand what is meant by business and enterprise coaching
- ✓ Understand the policies and codes of ethics that impact on business and enterprise coaching support interventions
- ✓ Be able to agree the process of business and enterprise coaching with a client
- ✓ Be able to deliver a professional business and enterprise coaching support service
- ✓ Be able to optimise the impact of a client's personality, competence, organisational role and level of authority on the business and enterprise coaching intervention
- ✓ Be able to support a client to measure the impact of the business and enterprise coaching support intervention
- ✓ Be able to refer a client to appropriate sources of information, advice and guidance

Assessment and Grading of This Unit

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

Evidence for this unit must be based on a minimum of three separate client interventions, a minimum of one must be observed and the remaining two can be through professional discussion and/or case study.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony

Unit Content

	Learning Outcome - The learner will:		Assessment Criterion - The learner can:
1	Understand what is meant by business and enterprise coaching	1.1	Explain what is meant by business and enterprise coaching
		1.2	Describe the sources of business and enterprise coaching available to those starting their own business or developing an existing business
		1.3	Critically evaluate the advantages and disadvantages of each of the sources identified
		1.4	Evaluate how business and enterprise coaching support interventions add value to local economic development
		1.5	Analyse the characteristics required in order to operate as an effective business and enterprise coach
2	Understand the policies and codes of ethics that impact on business and enterprise coaching support interventions	2.1	Identify policies and codes of ethics for business and enterprise coaching that are set by own organisation and/or a professional body
		2.2	Analyse the implications of policies and codes of ethics for business and enterprise coaching that are set by own organisation and/or a professional body for developing professional coaching relationships with a client
3	Be able to agree the process of business and enterprise coaching with a client	3.1	Ensure the client understands the role of a business and enterprise coach and how it differs to other business support roles
		3.2	Agree with the client the goals and rules of the coaching process and how long the relationship may last including specific stages and any costs involved in work that would be undertaken
4	Be able to deliver a professional business and enterprise coaching support service	4.1	Identify a range of information resources available to use within a coaching environment
		4.2	Select appropriate methods of delivering the coaching session that meets the needs of the client
		4.3	Deliver the coaching in a way that encourages the client to develop the confidence, understanding and skills needed to meet their personal and business objectives
		4.4	Create a positive coaching experience that is welcoming, participative, non-judgemental and 'can do' focused
		4.5	Reflect on when moving into a training, mentoring, consultancy or advisor role and adapt delivery appropriately

5	Be able to optimise the impact of a client's personality, competence, organisational role and level of authority on the business and enterprise coaching intervention	5.1	Evaluate the impact the client's personality, competence, organisational role and level of authority may have on the coaching intervention(s)
		5.2	Implement approaches to optimise the impact of the client's personality, competence, organisational role and level of authority on the coaching intervention(s)
6	Be able to support a client to measure the impact of the business and enterprise coaching support intervention	6.1	Support the client to identify indicators that can be used to measure the impact of the coaching intervention(s) on their business
		6.2	Support the client to identify an appropriate method of measuring the impact of the coaching intervention(s)
7	Be able to refer a client to appropriate sources of information, advice and guidance	7.1	Identify when the client would benefit from further support intervention(s) where own skills and knowledge can no longer meet requirements
		7.2	Refer the client to relevant sources of information, advice and guidance when it is required

Annex

The following pages provide documentation supplied for your use in the delivery of this qualification. We do not mandate the use of this documentation but if you choose to not make use of it then it is expected that you have the necessary documentation in place which meets the minimum requirements in order to allow delivery to take place in an effective and efficient manner.

Learner Registration Form

Full Name (as will appear on certificate)	
Title (delete as appropriate)	Mr/Mrs/Miss/Ms/Dr/Prof
Home Address	
Telephone Number	
Email Address	
Unique Learner Number (centre to source and enter this information)	
Qualification/Unit Title	

Date of Birth		
Gender (delete as appropriate)	Male/Female	
Disability (delete as appropriate)	Yes/No/Not Stated	
Ethnicity (tick as appropriate)	Asian Bangladeshi	
	Asian Indian	
	Asian Pakistani	
	Any Other Asian Background	
	White and Black Caribbean	
	White and Black African	
	Asian and White	
	Any Other Mixed Background	
	Black African	
	Black Caribbean	
	Any Other Black Background	
	White British	
	White English	
	White Irish	
	White Scottish	
	White Welsh	
	Any Other White Background	
	Chinese	
	Other	

Assessment Plan

Learner Name	
Assessor Name	
Qualification/Unit Title(s)	
Date of Plan	
Next Review Date	

Feedback on previous planned tasks (to be used to explain the tasks that have been completed, how well the learner has performed and how much of the qualification has been achieved to date)

Unit Reference Number	Description of task to be completed including any preparation requirements	Target Date
Naturally occurring evidence may be used as appropriate but this will not be the main form of evidence generation		

Learner Signature		**Date:**
Assessor Signature		**Date:**
IQA Signature (if sampled)		**Date:**

Assessment Report

Learner Name	
Assessor Name	
Date of Assessment	
Evidence Reference Number	

Tick one or more options below to indicate the method of assessment used

Professional Discussion		Observation		Questioning		Product Evidence	
Other (please specify)							

Use the space below to provide a full account of the assessment carried out	Criteria covered by assessment

Use the space below to provide a full account of the assessment carried out	Criteria covered by assessment

Use this space to provide feedback to the learner:

Learner Signature		Date:
Assessor Signature		Date:
IQA Signature (if sampled)		Date:

Witness Testimony Report

Learner Name	
Assessor Name	
Witness Name	
Relationship to Learner	
Date of Witness Testimony	
Evidence Reference Number	

Use the space below to provide a full account of the witness testimony provided	**Criteria covered by assessment**

Use the space below to provide a full account of the witness testimony provided	Criteria covered by assessment

Use this space to provide feedback to the learner:

Learner Signature		Date:
Assessor Signature		Date:
Witness Signature		Date:
IQA Signature (if sampled)		Date:

Evidence Matrix Record

Learner Name		Assessor Name	
IQA Name		Unit Number	

Description of evidence (eg. CV, observation)	Evidence Reference Number	Assessment Criteria (enter the assessment criteria reference numbers below and tick in the corresponding column where the evidence referenced meets the requirement)														

Description of evidence (eg. CV, observation)	Evidence Reference Number	Assessment Criteria (enter the assessment criteria reference numbers below and tick in the corresponding column where the evidence referenced meets the requirement)														

I confirm that the evidence above meets the requirements of the unit in full and is the work of the learner. The evidence is also authentic, sufficient, valid and current to the standards required and the unit is now ready to be signed off as complete.

Learner Signature		Date	
Assessor Signature		Date	
IQA Signature (if sampled)		Date	

Summative Statement

Learner Name	
Qualification/Unit Title	

Learner Statement

I confirm that all of the evidence presented in relation to the above qualification/unit has been produced by myself and meets the requirement of being authentic, sufficient, valid and current to the standards required.

Learner Signature		Date:

Assessor Statement

I confirm that I have assessed all of the work produced and have ensured that the work is that of the above learner. I have ensured that during the learning process the evidence is authentic, sufficient, valid and current to the standards required.

Assessor Signature		Date:

IQA Signature (if sampled)		Date:

Internal Quality Assurance Sampling Report

Learner Name	
Assessor Name	
Qualification/Unit Title(s)	
Date of Sample	
Next Sample Date (if applicable)	

Type of sampling activity completed (tick at least one option on each of the first two rows):					
Interim sampling		Summative sampling (certification can be claimed)		Summative sampling (folder referred for actions)	
Folder check		Observation of delivery (observation report attached)		Learner interview (interview record attached)	
Other (please detail):					

Assurance of the assessment process (tick at least one option for each question):	Yes	No
Has an initial assessment taken place?		
Has an assessment/development plan been agreed with the learner?		
Is the Assessor recording assessment outcomes after each assessment has taken place and providing the learner with feedback?		
Has the Assessor confirmed authenticity, sufficiency, accuracy, consistency and validity whilst assessing the evidence?		
Are the learner's assessment/development records being updated and completed on an ongoing basis?		

Action points/feedback to the Assessor:

Assessor Signature		Date:
IQA Signature		Date:

Actions complete (folder not ready for certification)		Actions complete (folder can be claimed for certification)	

Assessor Signature		Date:
IQA Signature		Date:

Learner Interview Record

Learner Name	
Assessor Name	
Qualification/Unit Title	
Date of Interview	

Interview Questions:	Yes	No	N/A
Did the Assessor explain the requirements of the programme and assessment methods at induction?			
Did the Assessor explain the appeals, the complaints and the whistleblowing procedures?			
Did the Assessor explain the quality assurance process and the part that the IQA, Awarding Organisation and Regulator play within this?			
Did anyone find out about any training you needed and organise for this to take place?			
Did the Assessor agree an assessment plan so that you understood what is required, by when and why in order to achieve the qualification?			
Did the Assessor consider your prior learning and experience in the development of the assessment plan?			
Did the Assessor review and update assessment plans to provide clear structure and guidance to you for the completion of the qualification?			
Do you feel you have received the required support to complete the required assessments?			
Do you feel you can discuss disagreements with assessment decisions with the Assessor?			
Do you feel the qualification will help you in the future?			
Have you been provided with advice and guidance on what you could progress to after the completion of this qualification?			
Any other comments:			

Learner Signature		**Date:**
IQA Signature		**Date:**

SFEDI®AWARDS