SFEDI®AWARDS

Level 5 Certificate in Professional Business and Enterprise Support

Regulator	Ofqual	
Qualification Reference Number	610/8282/X	
Qualification Start Date	30/10/2026	
Review Date	29/10/2029	
Available Age Ranges	Pre 16	X
	16-18	X
	19+	✓
Total Qualification Time	190 hours	
Guided Learning	60 hours	

Copyright © 2026 SFEDI Enterprises Ltd

All rights reserved. This book or any portion thereof may not be reproduced or used in any manner whatsoever without the express written permission of the publisher (address below).

Approved SFEDI Awards centres and learners undertaking a SFEDI Awards qualification may photocopy this document free of charge and/or include a PDF version on its intranet where it is only done so for the purposes of the approved delivery of this qualification.

SFEDI Enterprises Ltd t/a SFEDI Awards
19 Victoria Road
Darlington
County Durham
DL1 5SF
www.sfedigroup.com

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 occasions 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.

Contents

About This Qualification 4
Qualification Overview 5
About SFEDI Awards 6
Customer Feedback 6
The Regulated Qualifications Framework (RQF) 7
Qualification Level 7
Qualification Size 7
Total Qualification Time (TQT) 7
SFEDI and the Business Support Standards 8
The Standards 8
How This Qualification Relates to the Standards 8
Specialist Certification 9
Using the Standards 9
What Does SFEDI Awards Expect? 10
Learner Registration and Certification 10
How We Monitor Qualification Delivery 11
Direct Claims Status (DCS) 11
Internal Quality Assurance 11
Delivery/Assessment 11
Delivery/Assessment/Quality Assurance Staff Requirements 12
Assessment Methods 13
Initial Assessment 13
Mandatory Assessment Methods 13
Expert Witness/Witness Testimony 13
Observation 13
Product Evidence 13
Professional Discussion 13
Recognition of Prior Learning 13
Simulation 14
Authentication of Learner Evidence 14
Feedback 14
Data Protection and Confidentiality 14
Protection of Minors in Evidence Collection 14
Unit Structure 16
Qualification Unit Details 17
T/652/4404 Deliver Professional Business and Enterprise Support to Clients 18
R/652/4403 Evaluate and Develop Own Professional Practice in Business and Enterprise Support 20
M/652/4402 Extended Professional Practice in Business and Enterprise Support 22
L/652/4401 Foundations of Business and Enterprise Advice 24
K/652/4400 Business Finance for Advisers 26
A/652/4399 Project Management for the Delivery of Business Advice 28
Supporting Documents 30

About This Qualification

This qualification is for those who wish to develop the broad base of skills, knowledge and understanding needed by professional business and enterprise professionals.

It is specifically for those working in the business support sector who help entrepreneurs and businesses to review their progress, action plan improvements, implement change and develop their business skills and knowledge. Reflecting changes in both the business environment and the business support landscape, it updates and re-levels the Level 5 Certificate in Professional Business and Enterprise Support Services, and is designed to meet the SFEDI Business Support Standards.

Learners must be within a business support or advisory role in order to evidence the requirements of all units. The role must not be work experience, or a role set up solely so that the learner can take this qualification.

Those who complete this qualification may wish to undertake other SFEDI Awards qualifications, further details of which can be found on our website.

Those who undertake this qualification may progress onto the Level 7 Certificate or Level 7 Diploma in Professional Business and Enterprise Support Services. Alternatively, the qualification may lead to a professional qualification within a specific subject (for example marketing, customer service or people development) to complement skills in the delivery of business support.

Qualification Overview

Qualification Structure	3 mandatory units and 3 optional units
Assessor Qualification Required **(please check details of appropriate Assessor qualifications later within this document)**	Yes
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)
Deliver Professional Business and Enterprise Support to Clients	T/652/4404	Mandatory	5	7	30
Evaluate and Develop Own Professional Practice in Business and Enterprise Support	R/652/4403	Mandatory	5	6	10
Extended Professional Practice in Business and Enterprise Support	M/652/4402	Mandatory	5	6	20
Foundations of Business and Enterprise Advice	L/652/4401	Optional	4	3	15
Business Finance for Advisers	K/652/4400	Optional	4	3	15
Project Management for the Delivery of Business Advice	A/652/4399	Optional	4	3	15

Rule of combination: Learners must achieve all three mandatory units (19 credits) to achieve the qualification. The optional units are additional units that learners may also take for further depth in a specialist area. They are not required to achieve the qualification, and learners who achieve an optional unit receive a unit certificate for it. All mandatory credit is at Level 5, so the majority of credit remains at Level 5 in every permitted combination.

Qualification size: Credit value 19. Guided Learning 60 hours. Total Qualification Time 190 hours. These figures are based on the mandatory units. Each optional unit adds 3 credits and 15 hours of Guided Learning.

Learners may take Business Finance for Advisers or Project Management for the Delivery of Business Advice to develop specialist practice, and Foundations of Business and Enterprise Advice is suited to those newer to advisory roles.

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.

SFEDI Awards is the awarding organisation of SFEDI®, which sets the SFEDI Business Support Standards. Our business support qualifications are built on the Business Support Standards and the research that has underpinned SFEDI's standards for business support since 2007.

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@sfedi.co.uk 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

SFEDI and the Business Support Standards

SFEDI® sets the Business Support Standards and recognises the professionals who meet them. SFEDI Awards is SFEDI's awarding organisation and offers the qualifications that evidence the Standards.

The Business Support Standards describe what people who support businesses and enterprises need to know and do. They are the evolution of the National Occupational Standards SFEDI developed between 2007 and 2010, which have underpinned qualifications, recruitment and contracts across the business support sector since, and they have been refreshed for today's advisers.

The Standards

The Business Support Standards are made up of:

- Core Standards, which apply to everyone who supports businesses
- Specialist Standards, for particular areas of practice such as Business Finance and Funding, AI and Digital Adoption, and Enterprise Mentoring
- Business Information and Introduction to Business Support Standards, for information and entry-level roles
- Professional behaviours that apply across all of the Standards

How This Qualification Relates to the Standards

This qualification is the qualification route to meeting the eight Core StandardsT:

- C1 Build and manage professional client relationships
- C2 Diagnose needs and analyse the business
- C3 Support action and change
- C4 Navigate, refer and broker support
- C5 Measure and evidence impact
- C6 Apply current business knowledge
- C7 Practise ethically and professionally
- C8 Develop own practice and networks

Achieving the qualification is the proof that a learner meets the Core Standards. The optional units give learners further depth in specialist areas, such as business finance and project delivery, that are covered by the Specialist Standards.

The table below shows where each Core Standard is evidenced. Deliver is Deliver Professional Business and Enterprise Support to Clients, Extended is Extended Professional Practice in Business and Enterprise Support, and Evaluate is Evaluate and Develop Own Professional Practice in Business and Enterprise Support.

Core Standard	Evidenced in the mandatory units
C1 Build and manage professional client relationships	Deliver LO1; Extended LO1 and LO2
C2 Diagnose needs and analyse the business	Deliver LO2 and 3.2; Extended 2.1
C3 Support action and change	Deliver LO3, 4.1 and 4.2
C4 Navigate, refer and broker support	Deliver 4.4
C5 Measure and evidence impact	Deliver 1.5 and 4.3
C6 Apply current business knowledge	Deliver 2.2 and 2.3
C7 Practise ethically and professionally	Extended LO3; Deliver 1.2
C8 Develop own practice and networks	Evaluate LO1 to LO4

Learners who already hold the previous SFEDI Awards Level 5 or Level 7 in Professional Business and Enterprise Support Services continue to meet the Core Standards and do not need to do anything further.

Specialist Certification

SFEDI will also offer Specialist Certification, recognising specialist practice against the Specialist Standards. Further details will be published when Specialist Certification opens.

Using the Standards

The Business Support Standards are free to read, download and use under a Creative Commons Attribution-NoDerivatives licence (CC BY-ND 4.0). Anyone using them must credit SFEDI and may not publish altered versions.

Further details of the Business Support Standards are available from the SFEDI Business Support Team at support@sfedi.co.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@sfedi.co.uk 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, depending 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
Level 3 Certificate in Assessing Vocational Achievement	✓	✓
Level 3 Award in Assessing Competence in the Work Environment	✓	×
Level 3 Award in Assessing Vocationally Related Achievement	×	✓
Level 3 Award in Understanding the Principles and Practices of Assessment	×	×
D32/33	✓	✓
A1/A2	✓	✓

All Quality Assurance staff must have the necessary competence in the subject matter of the qualification and the necessary competence in the internal quality assurance procedures to be used. They must also hold or be working towards the appropriate qualification from the table below. Quality Assurance staff 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
Level 4 Award in the Internal Quality Assurance of Assessment Processes and Practice	✓
Level 4 Certificate in Leading the Internal Quality Assurance of Assessment Processes and Practice	✓
Level 4 Award in Understanding the Internal Quality Assurance of Assessment Processes and Practice	×
D34	✓
V1	✓

If you wish to access public funding for the delivery of qualifications, please refer to your funding agency for delivery staff qualification requirements.

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 a real 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 have 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

This page is left intentionally blank

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

T/652/4404 Deliver Professional Business and Enterprise Support to Clients

Unit Status	Mandatory
Unit Level	5
Credit Value	7
Guided Learning	30 hours

Unit Overview and Main Outcomes

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

- Establish and manage professional relationships with business and enterprise support clients
- Analyse client needs and define the business problems to be addressed
- Deliver appropriate business and enterprise support to clients
- Plan, manage and review the delivery of support activity, including referring clients to other support services and helping them to access them

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 of which must be observed. The remaining interventions can be evidenced through professional discussion and/or case study. The professional discussion must explore how the learner has applied knowledge of business functions and the wider business environment in their client work.

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

- Observation
- Product evidence
- Learner statement / case study
- Professional discussion
- Witness testimony
- Recognition of prior learning

Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Be able to establish and manage professional client relationships in the delivery of business and enterprise support.	1.1	Make sure clients understand the roles and responsibilities within the support process and the limits of any contractual obligations.
		1.2	Follow own organisation's processes and procedures when delivering business and enterprise support, including data protection and confidentiality requirements.
		1.3	Establish a style of discussion and exchange that helps clients to be open about business matters.
		1.4	Build credibility and trust with clients and appropriate stakeholders.
		1.5	Maintain contact and exchange information with each client in ways that meet their needs, and keep accurate records of contact and outcomes.
2	Be able to analyse client needs and define the business problems to be addressed.	2.1	Use appropriate techniques to gather and structure information about the client's business and its needs.
		2.2	Analyse the client's business to distinguish between the symptoms and the underlying causes of business problems.
		2.3	Apply analytical tools to assess the client's operating environment and its implications for the management and development of business
		2.4	Work with clients to agree the priorities and the way forward.
3	Be able to deliver appropriate business and enterprise support to clients.	3.1	Inspire and support clients to decide how to develop their business.
		3.2	Develop clear, evidence-based recommendations to support client decision-making.
		3.3	Work with clients in ways that allow them to develop their own skills and knowledge.
		3.4	Work with clients in ways that improve their confidence in how they manage their business.
4	Be able to plan, manage and review the delivery of support activity.	4.1	Work with clients to devise an action plan for improving the performance and sustainability of their business.
		4.2	Support clients to implement and monitor their action plan, adapting it as circumstances change.
		4.3	Agree with clients how success will be judged, then review, record and report the outcomes and impact of the support against the agreed objectives.
		4.4	Identify when the client's needs are outside own experience and expertise, and help them find and access the national, local or specialist services that meet them, leaving decisions with the client.

R/652/4403 Evaluate and Develop Own Professional Practice in Business and Enterprise Support

Unit Status	Mandatory
Unit Level	5
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:

- Assess the personal and professional skills required to deliver business and enterprise support
- Plan and implement own professional development
- Develop own professional networks
- Review the impact of personal and network development on the quality of support provided

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 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.

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

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

Unit Content

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

M/652/4402 Extended Professional Practice in Business and Enterprise Support

Unit Status	Mandatory
Unit Level	5
Credit Value	6
Guided Learning	20 hours

Unit Overview and Main Outcomes

This unit contains 3 learning outcomes which will support the learner to be able to:

- Communicate and engage professionally with clients and stakeholders across different business support interventions
- Build and manage professional relationships with partners and stakeholders
- Apply professional judgement and ethical practice when working with diverse clients and stakeholders

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 should be drawn from real client-facing and stakeholder situations, with a minimum of one observed interaction.

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

- Observation
- Product evidence
- Learner statement / case study
- Professional discussion
- Witness testimony
- Recognition of prior learning

Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Be able to communicate and engage professionally with clients and stakeholders.	1.1	Critically evaluate how to communicate with impact by adapting style and approach to the client, the situation and the type of intervention (for example one-to-one advice, mentoring, coaching, workshops or online support).
		1.2	Structure presentations and discussions to convey information and recommendations clearly.
		1.3	Manage challenging conversations professionally and constructively.
		1.4	Maintain professionalism and agreed service standards in client-facing situations.
2	Be able to build and manage professional relationships.	2.1	Engage and influence stakeholders in order to support client outcomes.
		2.2	Develop and manage relationships with partner organisations and stakeholders across multiple engagements.
3	Be able to apply professional judgement and ethical practice when working with diverse clients and stakeholders.	3.1	Apply professional judgement and decision-making in advisory practice.
		3.2	Identify and respond appropriately to ethical dilemmas, conflicts of interest and matters of professional conduct.
		3.3	Work within the limits of regulated activity and refer clients to authorised professionals when needed.
		3.4	Adapt own practice to work effectively with diverse clients and stakeholders.
		3.5	Manage complex client and stakeholder situations.
		3.6	Use digital and AI tools in advisory practice responsibly, protecting client information and checking outputs.

L/652/4401 Foundations of Business and Enterprise Advice

Unit Status	Optional
Unit Level	4
Credit Value	3
Guided Learning	15 hours

Unit Overview and Main Outcomes

This unit contains 3 learning outcomes which will support the learner to be able to:

- Understand the role and context of business and enterprise advice
- Understand professional communication and working relationships in advisory practice
- Understand professional standards and self-management in advisory practice

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.

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

- Knowledge assignment / written questions
- Reflective account
- Professional discussion
- Recognition of prior learning

Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand the role and context of business and enterprise advice.	1.1	Describe the role of business advisers in supporting business needs.
		1.2	Analyse the key trends in the UK business environment and the small and medium-sized enterprise (SME) landscape.
		1.3	Explain the key stages in the development and delivery of business advisory services.
		1.4	Explain how the wider economic and social environment can affect the business development and support needs of different types of business and organisation.
2	Understand professional communication and working relationships in advisory practice.	2.1	Compare communication methods and styles used in advisory practice.
		2.2	Explain the use of questioning and active listening techniques in professional conversations.
		2.3	Assess how rapport and professional relationships are built with clients and stakeholders.
3	Understand professional standards and self-management in advisory practice.	3.1	Explain the importance of ethics, confidentiality and professionalism in advisory practice.
		3.2	Assess the legal and ethical frameworks relevant to business advisory practice.
		3.3	Explain how reflective practice and self-management support professional performance.

K/652/4400 Business Finance for Advisers

Unit Status	Optional
Unit Level	4
Credit Value	3
Guided Learning	15 hours

Unit Overview and Main Outcomes

This unit contains 3 learning outcomes which will support the learner to be able to:

- Understand financial foundations and organisational performance
- Analyse financial information to generate business insight
- Develop and present financial recommendations to support clients

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.

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

- Product evidence (for example, financial analysis or projections prepared for a client)
- Knowledge assignment / written questions
- Reflective account
- Professional discussion
- Recognition of prior learning

Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand financial foundations and organisational performance.	1.1	Explain the key financial statements and financial terminology used by small and medium-sized enterprises.
		1.2	Explain the relationship between profit, cash flow and forecasting.
		1.3	Describe how financial indicators help to understand the development and health of a client's business.
2	Be able to analyse financial information to generate business insight.	2.1	Use financial ratios and performance measures to interpret a client's financial information.
		2.2	Identify trends, risks and opportunities from financial and operational data.
		2.3	Recognise the limitations of financial analysis when supporting business decisions.
3	Be able to develop and present financial recommendations to support clients.	3.1	Develop evidence-based recommendations from the analysis of the financial performance of the business.
		3.2	Present financial information and findings clearly to support the decision-making of the client.

A/652/4399 Project Management for the Delivery of Business Advice

Unit Status	Optional
Unit Level	4
Credit Value	3
Guided Learning	15 hours

Unit Overview and Main Outcomes

This unit contains 3 learning outcomes which will support the learner to be able to:

- Plan the delivery of business advice
- Manage the delivery of advisory activity, including risk and change
- Monitor outcomes and support continuous improvement

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.

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

- Product evidence (for example, a project plan and outcomes report)
- Learner statement / case study
- Reflective account
- Professional discussion
- Recognition of prior learning

Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Be able to plan the delivery of business advice.	1.1	Define the objectives and scope of an advisory activity.
		1.2	Produce a plan for an advisory activity using appropriate project management tools.
		1.3	Plan and prioritise the resources required to deliver the activity.
2	Be able to manage the delivery of advisory activity.	2.1	Monitor delivery and progress against the plan.
		2.2	Identify and manage risks, issues, assumptions and dependencies during delivery.
		2.3	Respond to change and shifting priorities while maintaining delivery quality.
3	Be able to monitor outcomes and support continuous improvement.	3.1	Evaluate the delivery of the advisory activity against its plan, resources and timescales.
		3.2	Identify lessons learned and improvements to inform future activity.

Supporting Documents

SFEDI Awards offers a range of templates and supporting documents to support you. These can be found at https://sfediawards.co.uk/centre-hub

SFEDI®AWARDS

SFEDI Awards
19 Victoria Road
Darlington
County Durham
DL1 5SF

T: **0845 224 5928**
E: **customerservices@sfediawards.com**