

**ILM LEVEL 5  
CERTIFICATE IN  
BUSINESS SUPPORT**



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# ILM LEVEL 5 CERTIFICATE IN BUSINESS SUPPORT (QCF)

[Qualification No. – 500/3757/2]

***Note: This qualification specification should always be read in conjunction with the “Supporting Notes for ILM VRQs” document which is downloadable from ILM website or it can be accessed via your Quality Manager/External Verifier or from the ILM Customer Services Team by emailing at [customer@i-l-m.com](mailto:customer@i-l-m.com)***

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| ILM Level 5 Certificate in Business Support<br>Qualification Specification | © Institute of Leadership & Management | Version: October<br>2011 |
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## Table of Contents

---

Qualification Overview 3

Occupational Competency Requirements 4

Assessment Guidance 5

### APPENDICES

Appendix A – Unit Specifications 7

Appendix B – Mandatory Assessments 17

**QUALIFICATION OVERVIEW:**

| <b>ILM Level 5 Certificate in Business Support</b>   |   |                     |
|--|---|---------------------|
| Purpose of the qualification   | Aims to develop a broad base of skills, knowledge and understanding of business support needed by those working in the business support sector.   |                     |
| Progression routes   | Successful learners may benefit from career enhancement and/or progress to other programmes leading to various enterprise, leadership, management development or coaching/mentoring qualifications at the same or higher levels according to their individual requirements. |                     |
| Credit Value   | 23  |                     |
| Induction  | 3 hours   |                     |
| Tutorial Support   | At least 3 hours  |                     |
| Guided Learning Hours<br>(this includes time for induction, tutorial support and the unit's guided learning hours) | 78 hours  |                     |
| To be completed within   | 3 years   |                     |
| Structure  | <b>Mandatory Units</b>  | <b>Credit Value</b> |
|  | E5.05 Personal Professional Development   | 7 credits           |
|  | E5.07 Building Business Support Relationships   | 8 credits           |
|  | E5.08 Delivering Business Support   | 8 credits           |

## OCCUPATIONAL COMPETENCY REQUIREMENTS FOR THE LEVEL 5 CERTIFICATE IN BUSINESS SUPPORT

It is the centres responsibility to ensure that they have competent and suitably qualified staff involved in delivering, quality assuring and/or assessing qualifications.

A Centre should normally be approved to offer at least the ILM Level 3 Certificate in First Line Management (to demonstrate appropriate competence in management development). Centres not approved to offer the appropriate management qualifications will need to demonstrate that members of their staff meet the Occupational Expertise standards for those qualifications.

The table below shows the occupational competence requirements of tutors, internal quality assurers and/or assessors. Given that occupational competence requirements will vary greatly between lower and higher level qualifications, this table will highlight if there is an additional requirement of any qualification specific occupational competency.

| <b>Tutors Occupational Competence Requirements</b>                           | <b>Evidence Indicators</b>  |
|--|---|
| A thorough knowledge and understanding of the qualification(s).              | <ul style="list-style-type: none"> <li>Have a relevant qualification in the subject area that must be at equal or higher level or have an equivalent qualification.</li> <li>Show evidence of information or documents prepared for learners such as a learner journey plan (SoW), lesson plan, learner guidance notes, tutorial support plan etc. for the ILM qualification.</li> <li>Show evidence of participation in Continuing Professional Development (CPD) in relation to the relevant field and qualification requirements.</li> </ul> |
| Relevant and credible experience in the field of the relevant qualification. | <ul style="list-style-type: none"> <li>Individuals involved in delivering, assessing and quality assuring the L5 Certificate in Business Support should have current practical experience of management within a small business, or of advising small businesses.</li> </ul>  |
| A qualification in support of teaching/training                              | <ul style="list-style-type: none"> <li>Ideally hold a valid and recognised teaching/training qualification.</li> </ul>  |

| <b>Internal Quality Assurers and/or Centre Assessors Occupational Competence Requirements</b>                  | <b>Evidence Indicators</b>   |
|--|--|
| A thorough knowledge and understanding of the relevant qualification(s).                                       | <ul style="list-style-type: none"> <li>Have a relevant qualification in the subject area that must be at equal or higher level or have an equivalent qualification.</li> <li>Show evidence of carrying out CPD in order to familiarise themselves with current standards for assessment/verification in the subject area of this qualification.</li> </ul> |
| Relevant and credible experience in the field of the relevant qualification.                                   | <ul style="list-style-type: none"> <li>Individuals involved in assessing and quality assuring the L5 Certificate in Business Support should have current practical experience of management within a small business, or of advising small businesses.</li> </ul>   |
| A qualification in support of assessment and/or internal quality assurance.                                    | <ul style="list-style-type: none"> <li>Ideally hold an assessment qualification (e.g. TAQA or equivalent)</li> </ul>   |
| Experience and a working knowledge of the operational and assessment processes for the relevant qualification. | <ul style="list-style-type: none"> <li>Demonstrate an understanding of the organisation's management centric policies, procedures and practices.</li> <li>Demonstrate knowledge and understanding of ILM's quality assurance policy, procedures and requirements.</li> </ul>   |

## ASSESSMENT GUIDANCE FOR THE LEVEL 5 CERTIFICATE IN BUSINESS SUPPORT

A brief introduction on ILM's Assessment Strategy can be found in *Supporting notes for ILM VRQs*. For detailed information, centres are encouraged to refer to the various assessment guides that are available from the ILM Customer Services Team at [customer@i-l-m.com](mailto:customer@i-l-m.com) or refer to the Centre Manual ([www.i-l-m.com/centres.aspx](http://www.i-l-m.com/centres.aspx)). This segment gives you specific guidance around assessments for the Level 5 Certificate in Business Support.

Appendix B in this document outlines the assessments and mark sheets for the units in this qualification. Centres should use the prescribed assessments. However some flexibility is permitted. In exceptional circumstances and to meet a specific need a centre may deviate from the prescribed assessment subject to prior written approval from ILM. Equal opportunities issues are relevant to all units of study and these aspects should be explicitly addressed in the delivery and assessment of this programme. The table below gives a brief overview of the units and assessments:

| Unit  | Assessment                                    |
|---|---|
| E5.05 Personal Professional Development       | Personal Development Portfolio                |
| E5.07 Building Business Support Relationships | Project Portfolio (including one observation) |
| E5.08 Delivering Business Support             |   |

Learners are likely to come from a variety of backgrounds, in that they will have had different training and work experiences, differing ambitions and opportunities, centres therefore can encourage learners to select topics for assessment in their own organisation and/or area of work, (or within another organisation if they are currently unemployed or self-employed). They should ensure learners are able to present their work as simple and clearly as possible. An approximate word count is given for each assessment. This should be seen as a guide to help achieve a balanced piece of work.

Centres must ensure that learners adequately complete all sections of the assessment. To ensure all learning outcomes are assessed, section passes have been provided in the assessments. To assist this practice, ILM normally applies a pass mark of 50% in each section as reflecting a minimum pass. Centres must note that compensation between learning outcomes is not allowed in any QCF unit.

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# **A P P E N D I X - A**

## **UNIT SPECIFICATIONS FOR THE CERTIFICATE IN BUSINESS SUPPORT**

|   |  |   |
|---|--|---|
| <b>Title:</b>   | <b>Personal Professional Development (E5.05)</b> |   |
| <b>Level:</b>   | 5  |   |
| <b>Credit value:</b>  | 7  |   |
| <b>Learning outcomes (the learner will)</b>   |  | <b>Assessment criteria (the learner can)</b>  |
| 1 Assess whether the ethical and professional standards expected of business advisors are met   |  | 1.1 Review own work practices in order to assess whether they meet the ethical and professional standards expected of business advisers, and identify improvements that could be made to own work practices                     |
| 2 Plan and implement own personal professional development  |  | 2.1 Investigate own continuing professional development needs, taking into account changes in own work roles and operating environment<br>2.2 Devise and implement personal development plans based on identified needs         |
| 3 Develop own professional networks   |  | 3.1 Assess the quality of own current networks and identify how they could be improved<br>3.2 Implement plans for improving own professional networks, and identify the outcomes of these efforts                               |
| 4 Review and improve business support services offered by self or employers   |  | 4.1 Use performance monitoring techniques to review the business support services offered by self or employers<br>4.2 Identify and implement opportunities for improving business support services offered by self or employers |
| <b>Additional information about the unit</b>  |  |   |
| Unit purpose and aim(s)   |  | To equip business advisers with the skills to manage their continuing personal professional development.  |
| Unit review date  |  | 31/12/2014  |
| Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate) |  | Links to SFEDI 2007 NOS: Business Support Standards (Units 5-8)   |
| Assessment requirements or guidance specified by a sector or regulatory body (if  |  |   |

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| appropriate)  |  |
| Support for the unit from a sector skills council or other appropriate body (if required) | SFEDI  |
| Location of the unit within the subject/sector classification system                      | Business Management  |
| Name of the organisation submitting the unit  | Institute of Leadership & Management   |
| Availability for use  | Shared   |
| Units available from  | 01/01/2008   |
| Unit guided learning hours  | 24   |
| <b>Additional Guidance about the Unit</b>   |  |
| <b>Indicative Content:</b>  |  |
| 1   | <ul style="list-style-type: none"> <li>The reasons for reviewing their own performance and the limitations of self-appraisal</li> <li>Professional codes of conduct and ethics for business advisers</li> <li>Reliable sources of feedback from, for example, line managers, supervisors, peers, mentors, fellow learners and professional associations</li> <li>Methods for monitoring and recording work practices with clients</li> <li>The standards of performance set by professional associations, commissioning bodies, contractors and business support providers</li> </ul>  |
| 2   | <ul style="list-style-type: none"> <li>The principles of continuing professional development</li> <li>Personal learning styles and preferences</li> <li>Action-planning techniques</li> <li>A range of work-based learning activities, for example: <ul style="list-style-type: none"> <li>Learning logs</li> <li>Mentoring</li> <li>Projects</li> <li>Work shadowing</li> <li>Books, journals, videos, CDs and other media</li> </ul> </li> <li>Sources of continuing professional development for business advisers</li> <li>The personal development policies and practices of their employer</li> </ul>                            |
| 3   | <ul style="list-style-type: none"> <li>Communication and interpersonal skills associated with networking</li> <li>How networks are established and developed, the distinctions between formal and informal networks, and methods for extending and strengthening networks</li> <li>The ethics of using contacts and networks for the benefit of clients, and the limitations of networks in recruitment, procurement and contracting</li> <li>Policies and guidelines on client confidentiality, sharing client data, sharing access to management information systems, equal opportunities, diversity and social inclusion</li> </ul> |
| 4   | <ul style="list-style-type: none"> <li>The importance of establishing and applying appropriate measures for evaluating the performance of business support services</li> </ul>   |

- |  |
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| <ul style="list-style-type: none"><li>• Sources of information about the performance of other business support providers</li><li>• Systems for collecting and assessing performance monitoring data</li><li>• How to use performance assessments to identify opportunities for improvements to services</li><li>• Customer services standards and practices used by business support providers, including practices for contracts and agreements with clients, handling complaints and disputes, client confidentiality, and professional indemnity</li><li>• Current approaches to evaluating business support services used by and for government agencies</li></ul> |
|--|

| <b>Title:</b>   | <b>Building business support relationships (E5.07)</b>                           |   |
|---|--|---|
| <b>Level:</b>   | 5  |   |
| <b>Credit value:</b>  | 8  |   |
| <b>Learning outcomes (the learner will)</b>   |  | <b>Assessment criteria (the learner can)</b>  |
| 1   | Interact effectively with clients  | 1.1 Find a style of discussion and exchange that helps clients to be open about business matters<br>1.2 Maintain contact and exchange information with each client, in ways that are appropriate and meet their needs           |
| 2   | Use an effective mode of consulting and direct clients to others where necessary | 2.1 Use a mode of consulting that is effective for each client at each stage of the relationship<br>2.2 Direct clients to other services when these will meet their needs more closely  |
| 3   | Make sure clients understand roles, responsibilities, processes and procedures   | 3.1 Make sure clients understand the roles and responsibilities of the support process and the limits of any contractual obligations<br>3.2 Follow your organisations processes and procedures when delivering business support |
| 4   | Encourage clients to develop their confidence, knowledge and skills              | 4.1 Work with clients in ways that allow them to develop their skills and knowledge for themselves<br>4.2 Work with clients in ways that improves their confidence in how they manage their business                            |
| <b>Additional information about the unit</b>  |  |   |
| Unit purpose and aim(s)   |  | To equip business advisers with the skills to build effective business support relationships with their clients.  |
| Unit review date  |  | 31/12/2014  |
| Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate) |  | Links to SFEDI 2007 NOS: Business Support Standards (Units 1 - 4)   |
| Assessment requirements or guidance specified by a sector or regulatory body (if  |  |   |

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| appropriate)  |  |
| Support for the unit from a sector skills council or other appropriate body (if required) | SFEDI  |
| Location of the unit within the subject/sector classification system                      | Business Management  |
| Name of the organisation submitting the unit  | Institute of Leadership & Management   |
| Availability for use  | Shared   |
| Units available from  | 01/01/2008   |
| Unit guided learning hours  | 24   |
| <b>Additional Guidance about the Unit</b>   |  |
| <b>Indicative Content:</b>  |  |
| 1   | <ul style="list-style-type: none"> <li>How to use effective interpersonal and communication skills, including, when appropriate: <ul style="list-style-type: none"> <li>listening fully and attentively;</li> <li>questioning;</li> <li>checking accuracy;</li> <li>summarising;</li> <li>reflecting back;</li> <li>challenging;</li> <li>respecting and acknowledging issues;</li> <li>negotiation;</li> <li>giving, receiving and passing on constructive feedback;</li> <li>dealing with difficulties</li> </ul> </li> <li>The benefits and drawbacks of different kinds of communication in different circumstances (for example, face-to-face contact, phone, fax and e-mail)</li> <li>The dynamics of business support relationships</li> <li>How to detect if a client is anxious about their business and raise the matter sensitively</li> </ul>  |
| 2   | <ul style="list-style-type: none"> <li>Ways to respond to clients' values, ways of thinking and business needs</li> <li>Ways to tailor your approach to align with clients' goals and circumstances</li> <li>How to agree with the client: <ul style="list-style-type: none"> <li>When you will provide feedback</li> <li>what actions you will carry out</li> <li>when you will make yourself available</li> </ul> </li> <li>Methods to encourage clients to clearly explain what they want to achieve so that you can identify and arrange support services that may help them</li> <li>Ways to propose and promote services (including costs) that are likely to meet clients needs</li> <li>The principles and practice of different modes of consulting (for example, acceptant, catalytic, confrontational and prescriptive)</li> <li>Ways to encourage clients to judge when and how to share their views and concerns with you and among their team</li> <li>Ways to clarify the roles and needs of different team members if you are working with a client team</li> <li>Ways of resourcing, including financing, support for business development and</li> </ul> |

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|   | <p>assessing returns on investment.</p> <ul style="list-style-type: none"> <li>• The boundaries of the relationship between you and the client</li> <li>• The ways that different clients prefer to work</li> <li>• The limits of your own abilities and understanding of business practice</li> <li>• Ways to recognise when a client needs more specialist: <ul style="list-style-type: none"> <li>▪ personal support (for example, through conversation with you, reference to a counsellor or agreeing it's nothing to do with you); and</li> <li>▪ business advice (for example, an accountant, financial advisor, marketing specialist, IT consultant, e-business adviser and so on)</li> </ul> </li> <li>• The features and benefits of the business support services you provide, and those of any other services that you direct clients to</li> <li>• Who is qualified to give specialist advice and when to direct clients to them</li> <li>• How to co-ordinate support services that match different client needs</li> <li>• The funding that is available and relevant to clients' needs</li> <li>• The procedures of funding agencies</li> </ul>  |
| 3 | <ul style="list-style-type: none"> <li>• Ways to end an engagement with a client in a way that encourages them to contact you for support in the future</li> <li>• Ways to review with clients how they feel the relationship with you and your organisation is going</li> <li>• Processes for keeping up-to-date and accurate records of client contact at all stages of the relationship</li> <li>• How to maintain client confidentiality</li> <li>• The conditions for accepting clients onto different business support services</li> <li>• The benefits and drawbacks of working in different physical locations (for example, your organisation's premises or your client's premises)</li> <li>• The limitations of your role and responsibilities</li> <li>• Any relevant contractual obligations</li> <li>• The guidelines for providing support services set by your organisation or professional body about: <ul style="list-style-type: none"> <li>▪ maintaining confidentiality in different working environments;</li> <li>▪ ethics, values and professional standards;</li> <li>▪ equal opportunities, diversity and social inclusion;</li> <li>▪ funding and other support available to the client;</li> <li>▪ using information management systems;</li> <li>▪ using invoicing systems, pricing and credit-control policies; and</li> <li>▪ procedures for quality assurance and handling complaints</li> </ul> </li> <li>• The role of your organisation in developing competition among local businesses</li> </ul> |
| 4 | <ul style="list-style-type: none"> <li>• Ways to work with clients to help them to review and develop skills that will improve their ability to compete with other businesses (for example, mentoring, coaching and e-learning)</li> <li>• Ways to identify the knowledge and skills that clients need</li> <li>• The theories and application of learning styles (for example, Kolb experiential model; auditory, visual, tactile/kinaesthetic; collaborative/activist, individual/reflective, theory-based/theorist or practice-led/pragmatist)</li> <li>• Ways to identify effective ways of learning</li> <li>• What obstacles or barriers there may be to changing working or business practices (for example, personal emotional baggage or objections from other business partners)</li> <li>• The available support services and resources and how they can be accessed, combined and co-ordinated</li> <li>• Ways to develop clients' self-confidence</li> <li>• Ways to respond to the client's values, ways of thinking and business needs</li> <li>• Ways to assist client's decision making to promote their autonomy</li> <li>• Effective delegation</li> </ul>  |

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|---|--|--|
| <b>Title:</b>   | <b>Delivering business support (E5.08)</b> |  |
| <b>Level:</b>   | 5  |  |
| <b>Credit value:</b>  | 8  |  |
| <b>Learning outcomes (the learner will)</b>   |  | <b>Assessment criteria (the learner can)</b>   |
| 1. Help clients review and plan how to develop their business   |  | 1.1 Work with clients to analyse their business and decide the way forward<br>1.2 Inspire clients to decide how to develop their business  |
| 2. Help clients embrace change and put it into practice   |  | 2.1 Evaluate clients readiness to implement changes and help them develop the necessary commitment<br>2.2 Challenge clients to evaluate and prioritise changes and put them into practice  |
| 3. Support clients when action planning to improve their business   |  | 3.1 Work with clients to devise and evaluate an action plan for improving the performance and sustainability of their business<br>3.2 Show clients how to implement and monitor their action plan and deal with any necessary contingencies or re-planning |
| <b>Additional information about the unit</b>  |  |  |
| Unit purpose and aim(s)   |  | To equip business advisors with the skills to work with their clients to develop their businesses.   |
| Unit review date  |  | 31/12/2014   |
| Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate) |  | Links to SFEDI 2007 NOS: Business Support Standards (Units 2 – 4)  |
| Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)   |  |  |
| Support for the unit from a sector skills council or other appropriate body (if required)   |  | SFEDI  |
| Location of the unit within the subject/sector classification system  |  | Business Management  |

|  |  |
|--|--|
| Name of the organisation submitting the unit | Institute of Leadership & Management   |
| Availability for use                         | Shared   |
| Units available from                         | 01/01/2008   |
| Unit guided learning hours                   | 24   |
| <b>Additional Guidance about the Unit</b>    |  |
| <b>Indicative Content:</b>                   |  |
| 1  | <ul style="list-style-type: none"> <li>Ways to identify clients': <ul style="list-style-type: none"> <li>business aspirations;</li> <li>style of learning;</li> <li>obstacles and stated and unstated objections to changing their ways of working or doing business;</li> <li>thoughts and feelings about business performance, direction and shared values of the business and stakeholders</li> </ul> </li> <li>The information needed to review a business and how to obtain it</li> <li>Ways to use established measures and diagnostic tools to evaluate business situations, including: <ul style="list-style-type: none"> <li>Business performance data analysis and performance measures (for example, benchmarking)</li> <li>Qualitative and quantitative analytical and diagnostic techniques (for example, SWOT, PEST, five forces or variance analysis)</li> <li>Market appraisal, pricing and evaluating the different types of products offered (product mix)</li> <li>Evaluation of production processes and techniques</li> <li>Financial appraisal techniques</li> <li>Risk assessment techniques</li> <li>Analysis of business culture</li> <li>Identification of stakeholders and their influence</li> <li>Profiling of individuals' strengths, weaknesses and motivation</li> <li>Common problems and opportunities small businesses (including structured business formats such as franchising, direct selling, licensing and distribution agreements) may face</li> </ul> </li> <li>Ways to identify: <ul style="list-style-type: none"> <li>trends and developments that may affect the client's business (for example, consumer demand, new technology or government legislation)</li> <li>Barriers or obstacles to improving performance (for example, personal, interpersonal issues, funding or skills)</li> <li>which parts of a business would benefit from change</li> </ul> </li> <li>Ways to solve business problems, by: <ul style="list-style-type: none"> <li>identifying possible problems and opportunities;</li> <li>monitoring and evaluating progress; and</li> <li>evaluating the benefits and drawbacks of different decisions</li> </ul> </li> <li>The most suitable options and the options most appropriate to specific issues</li> <li>How to challenge clients in overcoming obstacles and barriers to achievement</li> <li>How to support clients in dealing with problems and difficulties that may exist in achieving solutions</li> <li>How to define business objectives, actions, organisational structures, roles and responsibilities</li> <li>How to set practical, specific and ambitious personal and business objectives for the short-, medium- and longer term</li> <li>How to improve the competitiveness and the benefits and drawbacks of different kinds of competition</li> </ul> |

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

## **A P P E N D I X - B**

### **ASSESSMENTS FOR THE CERTIFICATE IN BUSINESS SUPPORT**

**E5.05: PERSONAL PROFESSIONAL DEVELOPMENT ASSESSMENT**

|  |   |
|--|---|
| <b>Centre Number:</b>  | <b>Centre Name:</b>   |
| <b>Learner Registration No:</b>  | <b>Learner Name:</b>  |
| <b>TASK</b><br><br>Maintain a portfolio of your personal development activities as a business adviser, over a period of not less than six months. The portfolio must contain materials relating to the four elements of the personal development process shown below.<br><br>Use the headings shown below to structure your portfolio<br><br>Check your assignment carefully prior to submission using the assessment criteria   |   |
|  | <b>Assessment Criteria</b>  |
| <b>Background</b><br><br>Briefly describe your career background and your current job or occupation, and how this relates to the professional role of business adviser<br><br><i>(min 2 marks required from 4 available)</i>   | <ul style="list-style-type: none"> <li>The context for the personal professional development activities is provided</li> </ul>  |
| <b>Personal reviews</b><br><br>The portfolio should contain -<br><br>A skills analysis of your current occupation using National Occupational Standards, focusing on the SFEDI business support and social enterprise support standards, but also identifying any other standards that are applicable<br><br>Copies of at least two personal reviews of your work with clients, conducted with support from a work colleague, containing proposals for improvements to your work practices<br><br><i>(min 13 marks required from 26 available)</i> | <ul style="list-style-type: none"> <li>Personal work practices have been reviewed and assessed against ethical and professional standards for business advisers, and improvements that could be made to work practices have been identified</li> </ul>                    |
| <b>Personal development plans</b><br><br>The portfolio should contain -<br><br>A training needs analysis, derived from your job description, skills analysis and personal reviews<br><br>A personal development plan based on the training needs analysis, setting out objectives and methods, and a programme of personal development activities<br><br>Evidence that you have implemented your personal development plan and have achieved some of the outcomes<br><br><i>(min 13 marks required from 26 available)</i>                          | <ul style="list-style-type: none"> <li>Continuing professional development needs have been investigated, taking into account any changes in work roles and operating environment</li> <li>A personal development plan has been devised and implemented</li> </ul>         |
| <b>Network development</b><br><br>The portfolio should contain –<br><br>An analysis of your professional network and proposals for improving this network<br><br>At least two examples of your professional networking activities, together with a brief evaluation of the new contacts added to your network<br><br>At least two examples of your use of your professional network for the benefit of your clients  | <ul style="list-style-type: none"> <li>The quality of current networks have been assessed and ways of improving networks have been identified</li> <li>Plans for improving professional networks have implemented, and the outcome of these efforts identified</li> </ul> |

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| <i>(min 10 marks required from 20 available))</i>  |   |
| <p><b>Service reviews</b></p> <p>The portfolio should contain –</p> <p>A description how you or your employer monitor the performance of the business support service you provide</p> <p>At least two examples of the performance monitoring practices applied to your work with clients</p> <p>An analysis of performance monitoring data, together with proposals for improvements to the business support service</p> <p><i>(Min 12 marks required from 24 available)</i></p> | <ul style="list-style-type: none"> <li>• Performance monitoring techniques have been used to review the business support services</li> <li>• Opportunities for improving the business support service have been identified and implemented</li> </ul> |
| <p>I confirm that this portfolio is my own work and has been submitted for assessment in response to the task above, exactly as set by ILM</p> <p>Signature of Learner ..... Date .....</p>  |   |

**MARK SHEET: E5.05: PERSONAL PROFESSIONAL DEVELOPMENT**

| Centre Number:   |           | Centre Name:   |                     |         |
|--|-----------|--|---------------------|---------|
| Learner Registration No:   |           | 1. Learner named below confirms authenticity of submission.<br>2. ILM uses learners' submissions – on an anonymous basis – for assessment standardisation. By submitting, I agree that ILM may use this script on condition that all information which may identify me is removed.<br>However, if you are unwilling to allow ILM use your script, please refuse by ticking the box: <input type="checkbox"/> |                     |         |
| Criteria   | Strengths | Areas for Improvement  | Assr mark           | QA mark |
| <b>Background</b> <ul style="list-style-type: none"> <li>The context for the personal professional development activities is provided</li> </ul>   |           |  | / 4 marks (min 2)   |         |
| <b>Personal reviews</b> <ul style="list-style-type: none"> <li>Personal work practices have been reviewed and assessed against ethical and professional standards for business advisers, and improvements that could be made to work practices have been identified</li> </ul>                       |           |  | / 26 marks (min 13) |         |
| <b>Personal development plans</b> <ul style="list-style-type: none"> <li>Continuing professional development needs have been investigated, taking into account any changes in work roles and operating environment</li> <li>A personal development plan has been devised and implemented</li> </ul>  |           |  | / 26 marks (min 13) |         |
| <b>Network development</b> <ul style="list-style-type: none"> <li>The quality of current networks have been assessed and ways of improving networks have been identified</li> <li>Plans for improving professional networks have implemented, and the outcome of these efforts identified</li> </ul> |           |  | / 20 marks (min 10) |         |
| <b>Service reviews</b> <ul style="list-style-type: none"> <li>Performance monitoring techniques have been used to review the business support services</li> <li>Opportunities for improving the business support service have been identified and implemented</li> </ul>                             |           |  | / 24 marks (min 12) |         |

| Assessor's decision                             |                                   | Quality assurance use                           |                                   |
|---|-----------------------------------|---|-----------------------------------|
| Total marks                                     | Outcome<br>(circle as applicable) | Total marks                                     | Outcome<br>(circle as applicable) |
| Total 50 + overall, AND minimum in each section | PASS/REFERRAL                     | Total 50 + overall, AND minimum in each section | PASS/REFERRAL                     |
| Section referral if applicable:                 |                                   | Date of IQA check:                              |                                   |
| Name of assessor:                               |                                   | Name of IQA:                                    |                                   |
| Assessor signature and date:                    |                                   | IQA signature:                                  |                                   |
| ILM EV signature:                               |                                   | Date externally verified (where applicable):    |                                   |

**E5.07 and E5.08: BUSINESS SUPPORT ASSESSMENT: PROJECT PORTFOLIO**

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|--|--|
| <b>Centre Number:</b>  | <b>Centre Name:</b>  |
| <b>Learner Registration No:</b>  | <b>Learner Name:</b>   |
| <b>TASK</b><br><br>Briefly outline and maintain a portfolio of how you built business support relationships and delivered business support. The evidence in your portfolio could include <ul style="list-style-type: none"> <li>• A client contact log</li> <li>• E-mails or notes of telephone calls and meetings</li> <li>• Client/advisor agreement</li> <li>• Feedback from Line Manager and Client</li> <li>• A list of business support specialists and a list of business support services and resources</li> <li>• Records of questions</li> <li>• A personal reflective statement</li> <li>• Business audit/diagnostic tool</li> <li>• Business plan (including action plans)</li> <li>• Client personal action plan</li> <li>• SWOT and/or PEST Analysis</li> <li>• Meetings with clients and stakeholders</li> <li>• Guidelines for providing support services</li> <li>• Notes or record of reviewing action plans with clients</li> <li>• Completed learning style questionnaire – client</li> <li>• Job requirements</li> </ul> <p>Use the headings below when structuring your portfolio</p> <p>Check your portfolio carefully prior to submission using the assessment criteria</p> <p><b>You will be observed by the assessor during one of the meetings where you provide business support to a client. You should liaise with all relevant parties to arrange a suitable date and time for this</b></p> |  |
|  | <b>Assessment Criteria</b>   |
| <b>Context</b><br><br>Briefly describe your work setting and role in building business support relationships and in delivering business support. Include a brief overview of the clients you will be supporting.<br><br><i>(min 2 marks required from 4 available)</i>   | <ul style="list-style-type: none"> <li>• Context of the assignment is provided</li> </ul>  |
| <b>Effective interaction and consultation with clients</b><br><br>Briefly outline the following: <ul style="list-style-type: none"> <li>• The style of discussion that helped clients' be open about business matters</li> <li>• How contact was maintained with clients' and information exchanged</li> <li>• The mode of consulting that was effective for clients' at each stage of the relationship</li> <li>• Whether clients' were directed to other services that met their needs more closely</li> <li>• How you made sure that clients' understood the roles and responsibilities of the support process</li> <li>• How you followed your organisations processes and procedures when delivering business support</li> </ul> <p>Include evidence to substantiate your interaction and consultation with clients'</p>  | <ul style="list-style-type: none"> <li>• A style of discussion and exchange is found that helps clients to be open about business matters</li> <li>• Contact is maintained with and information exchanged with each client, in ways that are appropriate and meet their needs</li> <li>• A mode of consulting is used that is effective for each client at each stage of the relationship</li> <li>• Clients are directed to other services when these will meet their needs more closely</li> </ul> |

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|---|---|
| <p>(min 17 marks required from 34 available)</p>  | <ul style="list-style-type: none"> <li>• Made sure clients understood the roles and responsibilities of the support process and limits of any contractual obligations</li> <li>• Own organisations processes and procedures are followed when delivering business support</li> </ul>  |
| <p><b>Helped clients review and develop their business, assisted them to embrace change and develop their confidence</b></p> <p>Briefly outline how you did the following:</p> <ul style="list-style-type: none"> <li>• Worked with clients' to analyse their business and decide the best way forward</li> <li>• Worked with clients' in ways that allowed them to develop their skills and knowledge for themselves</li> <li>• Worked with clients' in ways that improved their confidence in how they manage their business</li> <li>• Inspired clients' to decide how to develop their business</li> <li>• Evaluated clients' readiness to implement changes and helped them to develop the necessary commitment</li> <li>• Challenged clients' to evaluate and prioritise changes and put them into practise</li> </ul> <p>(min 18 marks required from 36 available)</p> | <ul style="list-style-type: none"> <li>• Worked with clients to analyse their business and decide the best way forward</li> <li>• Worked with clients in ways that allowed them to develop their skills and knowledge for themselves</li> <li>• Worked with clients in ways that improved their confidence in how they manage their business</li> <li>• Inspired clients to decide how to develop their business</li> <li>• Clients' readiness to implement changes is evaluated and they are helped to develop the necessary commitment</li> <li>• Clients are challenged to evaluate and prioritise changes and put them into practise</li> </ul> |
| <p><b>Action Planning and Dealing with Contingencies</b></p> <p>Briefly outline how you</p> <ul style="list-style-type: none"> <li>• Worked with clients' to devise and evaluate an action plan for improving the performance and sustainability of their business</li> <li>• Showed clients' how to implement and monitor their action plan and deal with any necessary contingencies or re-planning</li> </ul> <p>Include evidence to substantiate how you helped clients' devise and evaluate an action plan and how you showed them how to implement and monitor their action plan and deal with any contingencies</p> <p>(min 13 marks required from 26 available)</p>   | <ul style="list-style-type: none"> <li>• Worked with clients to devise and evaluate an action plan for improving the performance and sustainability of their business</li> <li>• Clients are shown how to implement and monitor their action plan and deal with any contingencies or re-planning that may be necessary</li> </ul>   |
| <p>I confirm that this portfolio is my own work and has been submitted for assessment in response to the task above, exactly as set by ILM</p> <p>Signature of Learner ..... Date</p> <p>.....</p>  |   |

**MARK SHEET: E5.07 – E5.08: BUSINESS SUPPORT**

| Centre Number:  |           | Centre Name:   |                     |         |
|---|-----------|--|---------------------|---------|
| Learner Registration No:  |           | 1. Learner named below confirms authenticity of submission.<br>2. ILM uses learners' submissions – on an anonymous basis – for assessment standardisation. By submitting, I agree that ILM may use this script on condition that all information which may identify me is removed.<br>However, if you are unwilling to allow ILM use your script, please refuse by ticking the box: <input type="checkbox"/> |                     |         |
| Criteria  | Strengths | Areas for Improvement  | Assr mark           | QA mark |
| <b>Context</b> <ul style="list-style-type: none"> <li>The context for the business support activity is provided</li> </ul>  |           |  | / 4 marks (min 2)   |         |
| <b>Effective interaction and consultation with clients</b> <ul style="list-style-type: none"> <li>A style of discussion and exchange is found that helps clients to be open about business matters</li> <li>Contact is maintained with and information exchanged with each client, in ways that are appropriate and meet their needs</li> <li>A mode of consulting is used that is effective for each client at each stage of the relationship</li> <li>Clients are directed to other services when these will meet their needs more closely</li> <li>Made sure clients understood the roles and responsibilities of the support process and limits of any contractual obligations</li> <li>Own organisations processes and procedures are followed when delivering business support</li> </ul> |           |  | / 34 marks (min 17) |         |
| <b>Helped clients review and develop their business, assisted them to embrace change and develop their confidence</b> <ul style="list-style-type: none"> <li>Worked with clients to analyse their business and decide the best way forward</li> <li>Worked with clients in ways that allowed them to develop their skills and knowledge for themselves</li> <li>Worked with clients in ways that improved their confidence in how they manage their business</li> </ul>   |           |  |                     |         |

|   |   |   |  |   |  |
|---|---|---|--|---|--|
| <ul style="list-style-type: none"> <li>Inspired clients to decide how to develop their business</li> <li>Clients' readiness to implement changes is evaluated and they are helped to develop the necessary commitment</li> <li>Clients are challenged to evaluate and prioritise changes and put them into practise</li> </ul>  |   |   |  | / 36 marks<br>(min 18)                          |  |
| <b>Action Planning and Dealing with Contingencies</b> <ul style="list-style-type: none"> <li>Worked with clients to devise and evaluate an action plan for improving the performance and sustainability of their business</li> <li>Clients are shown how to implement and monitor their action plan and deal with any contingencies or re-planning that may be necessary</li> </ul> |   |   |  | / 26 marks<br>(min 13)                          |  |
| <b>Assessor's decision</b>  |   |   | <b>Quality assurance use</b>                           |   |  |
| <b>Total marks</b>  | <b>Outcome</b><br><i>(circle as applicable)</i> |   | <b>Total marks</b>                                     | <b>Outcome</b><br><i>(circle as applicable)</i> |  |
| <b>Total 50 + overall, AND minimum in each section</b>  | <b>PASS/REFERRAL</b>                            |   | <b>Total 50 + overall, AND minimum in each section</b> | <b>PASS/REFERRAL</b>                            |  |
| <b>Section referral if applicable:</b>  |   | <b>Date of IQA check:</b>                           |  |   |  |
| <b>Name of assessor:</b>  |   | <b>Name of IQA:</b>                                 |  |   |  |
| <b>Assessor signature and date:</b>   |   | <b>IQA signature:</b>                               |  |   |  |
| <b>ILM EV signature:</b>  |   | <b>Date externally verified (where applicable):</b> |  |   |  |