

DW3: Maintain effective development work relationships with clients

This unit is tailored from the National Occupational Standards for Business Support (SfEDI) where it appears as Unit 1

OVERVIEW	PERFORMANCE CRITERIA
<p>This is about managing your portfolio of development work clients, having rapport with each of those clients, whether an individual or a team, and helping to develop their trust in the organisation you work for. This requires you to exercise skills from good listening to client support and management and the promotion of your organisation's services.</p>	<p>You must be able to:</p> <ol style="list-style-type: none"> 1. Maintain contact and exchange information with each client, in the ways that are appropriate and meet their need, through face to face meetings or by phone or e-mail 2. Encourage clients to judge when and how to share their views and concerns with you and among their team. 3. Find a style of discussion and exchange that helps an individual client or a client team to be open about development work matters 4. Clarify the roles and needs of different team members if you are working with a client team 5. Encourage your clients to clearly explain what they want to achieve, so that you can identify and arrange support services that may help them. 6. Direct clients who need specialist advice to those qualified to provide such support. 7. Propose and promote services that are likely to meet your clients' needs. 8. Advise clients about ways of resourcing, including financing, support for development 9. Make sure that your clients understand the roles and responsibilities of the support process and the limits of any contractual obligations. 10. Review with clients how they feel the relationship with you and your organisation is going 11. Keep up-to-date and accurate records of client contact at all stages of the relationship. 12. Explain to clients how confidentiality will be maintained. 13. End an engagement with a client in a way that encourages them to contact you for support in the future.

KNOWLEDGE AND UNDERSTANDING

You need to know and understand the following:

Interpersonal and communication skills

- A. How to use effective interpersonal and communication skills, including, when appropriate:
- listening fully and attentively;
 - questioning;
 - checking accuracy;
 - summarising;
 - reflecting back;
 - challenging;
 - respecting and acknowledging issues;
 - negotiation;
 - giving, receiving and passing on constructive feedback;
 - dealing with difficulties.
- B. The benefits and drawbacks of different kinds of communication in different circumstances (for example, face-to-face contact, phone, fax and e-mail).

Support relationships

- C. You need to understand and take account of:
- the conditions for accepting clients;
 - the benefits and drawbacks of working in different physical locations (for example, your organisation's premises or your client's premises);
 - the boundaries of the relationship between you and the client;
 - the ways that different clients prefer to work;
 - the limitations of your role and responsibilities; and
 - any relevant contractual obligations.
- D. The limits of your own abilities and understanding.
- E. why it is important to assure clients of confidentiality
- F. why it is important to maintain confidentiality
- G. How to recognise when a client needs more specialist:
- support
 - advice (for example, an accountant, financial advisor, marketing specialist, IT consultant, and so on).

Funding and resources

- H. What support is available, what the referral procedures and costs are (for example, other kinds of development support, specialist advice, learning and information resources).
- I. How to co-ordinate support services that match different client needs.
- J. The funding that is available and relevant to the client's needs.
- K. The procedures of funding agencies.