

DW5: Help the client to analyse their organisation and decide the way forward

This unit is tailored from the National Occupational Standards for Business Support (SfEDI) where it appears as Unit 2.

OVERVIEW	PERFORMANCE CRITERIA
<p>This is about enabling your clients to develop a clear picture of their organisation, where it is and where it is heading. To do that they need to analyse the current performance and identify their needs.</p>	<p>You must be able to:</p> <ol style="list-style-type: none"> 1. Help your clients to express their thoughts about their organisation's performance, its direction and the values of the organisation and its stakeholders 2. Work with clients to evaluate and explain their current situation, using established measures and diagnostic tools where appropriate. 3. Help clients obtain the information they need to review their organisation, including the ideas of other stakeholders. 4. Help the client identify which parts of their activities would benefit from change. 5. Inspire the client to seek new opportunities for the organisation. 6. Challenge and encourage clients to set practical, specific and ambitious organisational objectives for the short-, medium- and longer-term. 7. Help the client identify obstacles to improved organisational performance. 8. Help clients evaluate possible changes against organisational objectives, risks and benefits and understand what may be involved in achieving the results required 9. Challenge and encourage clients to prioritise changes and identify the problems to be dealt with first. 10. Identify a suitable form of plan that the client can use to record and manage the identified changes and help them prepare it 11. Help the client consult with other stakeholders and obtain buy-in to the plan 12. Work with clients in a way that allows them to develop these analytical skills for themselves.

KNOWLEDGE AND UNDERSTANDING

You need to know and understand the following:

Communication and interpersonal skills

- A. How to use effective interpersonal and communication skills.
- B. The benefits and drawbacks of different kinds of communication (for example, face-to-face contact, phone, fax and e-mail).

Performance analysis

- C. Performance data analysis and performance measures (for example, setting indicators and data gathering, service user feedback, quality assurance, evaluation cycles, creation of a monitoring framework, selecting an appropriate quality system, comparisons with other similar organisations (for example, through benchmarking)).
- D. Qualitative and quantitative analytical and diagnostic techniques (for example, SWOT, PEST, five forces or variance analysis).
- E. Financial appraisal techniques.
- F. Risk assessment techniques.
- G. Analysis of organisational culture
- H. Identification of stakeholders and their influence
- I. Profiling of individuals' strengths, weaknesses and motivation
- J. Common problems and opportunities organisations may face.

Planning

- K. How to build support among stakeholders for policies, strategies and plans.
- L. How to define organisational objectives, actions, structures, roles and responsibilities.
- M. Financial planning.
- N. Development, presentation and use of plans.
- O. Identifying trends and developments that may affect the organisation
- P. Barriers or obstacles to improving performance (for example, personal, interpersonal issues, competing pressures, funding or skills).
- Q. Sources of new opportunities (for example, networking, internal and external trends, collaboration with other organisations).

Providing business support

- R. The dynamics of development work support relationships.
- S. The limits of your own skills and knowledge.
- T. The guidelines for providing development work services set by your organisation:
 - maintaining confidentiality;
 - ethics, values and professional standards;
 - equal opportunities, diversity and social inclusion;
 - funding and other support available to the client;
 - using information management systems; and
 - procedures for quality assurance and handling complaints.
- U. The features and benefits of the development work support services you provide, and those of any other services that you direct clients to.