

## Overview

This standard is for entrepreneurs who research the background and experiences of their clients. It is recommended for professionals providing support to individuals considering starting their own business and running existing businesses, either on a voluntary or commercial basis. You need to research the background and experience of your clients to manage the initial interaction with the individuals and business organisations. It requires you to identify the relevant sources of information, make sense of the collected information and use this meaning in ways which assists you in developing a relationship with the client.

Business support refers to assistance which is received from individuals or organisations outside of the business, related to a specific business problem or opportunity or development of the business. Enterprise support refers to assistance which is received by individuals considering starting their own business. A 'business' can mean an independent entity such as a private sector business, a social enterprise, a charitable or voluntary organisation, or a significant operating unit, with a relative degree of autonomy, within a larger organisation. It can also refer to a formal partnership where two or more businesses are working together towards common goals.

Research the background and experiences of your clients

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## Performance criteria

*You must be able to:*

1. define the research methodology, objectives, and the type of information required about the client
2. collate the sources of information about the client
3. identify and evaluate potential sources of information for their contribution to researching the background of the client
4. approach sources of information with a clear explanation of the purpose of the research
5. find out about the procedures that are required to access the information
6. specify the risks associated with the sources of information identified from the research
7. identify any problems with the collection of necessary information and take appropriate action to deal with them
8. access the sources of information within agreed procedures
9. collect information in accordance with the requirements of the research
10. apply information collation methods that meet the aims of research
11. analyse information in accordance with agreed methodology
12. develop suitable conclusions and state the key findings
13. identify any unexpected surprises and suggest reasons for them
14. consider alternative methods of collecting additional information to address any gaps about the client
15. present the outcomes of the research in an agreed format and in accordance with the defined research method
16. acknowledge the sources of information used in undertaking the research
17. review the progress and outcomes of the research with the appropriate people
18. comply with rules of information confidentiality in accordance with legal requirements
19. assess and evaluate the success of the research against the identified objectives
20. record the collected information and outcomes of the research in the appropriate systems
21. comply with legal requirements, industry regulations, organisational policies and professional codes

## Knowledge and understanding

### *You need to know and understand:*

Identify sources and availability of information

1. why it is important to be clear about the client research being undertaken
2. the types of information are required
3. the alternative sources of information
4. how the sources of information have co-operated in the past
5. the rules of confidentiality relating to different sources of information
6. the risks that should be considered
7. the problems than could occur and the actions required to address these problems

Collect information to achieve research objectives

8. the agreed procedures for accessing information
9. the information collection procedures
10. why it is important to apply collection methods correctly and consistently
11. the problems that could occur and the actions to address them
12. the systems for recording information and the procedures relating to the use of these systems

Collate the outcomes of the research

13. the methods of collating the outcomes from the research
14. the advantages and disadvantages of different methods of collating outcomes from the research
15. the approaches to be used for collating the outcomes from the research

16. why it is important to provide a rationale for the research results
17. the types of results expected and the possible reasons for any unexpected outcomes
18. who should be involved in reviewing the outcomes from the research

Use the outcomes of the research

19. how to present the outcomes from the research
20. who should be involved in using the outcomes from the research
21. the types of information that may be confidential or needs to be protected
22. the criteria to be used to for evaluation of research success
23. what types of system can be used for recording the outcomes from the research

Comply with guidance, legislation and codes of conduct

24. the appropriate guidance, legislation and codes of conduct relating to undertaking research and using the outcomes
25. why it is important to comply with appropriate with guidance, legislation and codes of conduct
26. what are the consequences of not complying with appropriate with guidance, legislation and codes of conduct
27. how to obtain information on appropriate with guidance, legislation and codes of conduct
28. the legal requirements, industry regulations, organisational policies and professional codes

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**Relevant Occupations** Business, Administration and Law, Managers and Senior Officials

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**Suite** Business Enterprise

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