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| **Standard** |  | **Evidence (case study paragraph)** |
| **C-skills** | **Consulting Skills** |  |
| C1 | How you market and sell your consultancy services |  |
| C2.  | How you approach new clients and develop mutual understanding with a potential client about the possibilities for an appropriate intervention |  |
| C3 | How you assure the client of your integrity and competence as a consultant and define your specialism |  |
| C4 | How you apply appropriate diagnostic tools to determine the current position of the client  |  |
| C5 | How you ensure that the client shares your perception of their situation  |  |
| C6 | How you scope the intervention |  |
| C7 | How you prepare a proposal for a client  |  |
| C8 | How you present your proposals to a client |  |
| C9 | How you determine the potential of each option with the client, whilst ensuring that you (or your practice) are able to deliver everything suggested within each option  |  |
| C10 | How you conclude the negotiation with the client and how the details of the agreement are recorded  |  |
| C11 | How the contractual arrangement and fee basis are agreed with the client |  |
| C12 | How you implement the agreed intervention and manage the client’s expectations according to the agreed plan |  |
| C13 | How you build on the initial rapport created with the client to produce a professional working relationship throughout the term of the assignment (and ongoing if appropriate) |  |
| C14 | How you identify suitable and accurate sources of information, and the methods of obtaining it  |  |
| C15 | Your ability to make a clear and appropriate analysis of information which is used in the decision-making process within a consultancy context |  |
| C16 | Your ability to select and put into place suitable systems for recording, storage and retrieval of information within a consultancy context  |  |
| C17 | How you advise, educate and inform colleagues and clients on the basis of your analysis of information within a consultancy context  |  |
| C18 | The use of appropriate techniques to manage financial resources within a consultancy context  |  |
| C19 | How you plan the use of physical resources with the client to meet the objectives of your assignment  |  |
| C20 | How sufficient and appropriate consultancy hours can be made available to fulfill the requirements of the intervention |  |
| C21 | How you would ensure sufficient client staff resources with appropriate skills to meet the objectives of your assignment |  |
| C22 | How you introduce, plan and control change management with a client |  |
| C23 | How you resolve conflicts within the parameters of an assignment |  |
| C24 | How you explain, establish and monitor the systems, processes and methods necessary for completion of the intervention  |  |
| C25 | How you ensure that all of the assignment’s objectives have been met in full |  |
| C26 | The process by which you enable your client to take ownership of the developments which you have introduced in the intervention  |  |
| C27 | How you assess your own performance during the assignment |  |
| C28 | How you manage your time within the assignment |  |
| C29 | How you manage withdrawal from the client |  |
| **Behavior** |  |
| Moral  | Integrity, character  |  |
| **M-skills** | **Management Skills** |  |
| M-1 | Appropriate contribution to meetings |  |
| M-2 | Suitable system for recording |  |
| M-3 | Analysis of information  |  |
| M-4 | Advise and educate colleagues  |  |
| M-5 | How you motivate staff  |  |
| M-6 | How you plan business  |  |
| M-7 | Managing financial resources  |  |
| M-8 | Planning physical resources  |  |
| **PESTLE** | **Awareness of:** |  |
| P | Political situation  |  |
| E | Economic situation  |  |
| S | Social issues  |  |
| T | Technology issues  |  |
| L | Legal issues, legislative  |  |
| E | Environment issues |  |