BSBSMB411 Manage specialist external advisory services

# Modification History

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| Release | Comments |
| Release 2 | This version released with BSB Business Services Training Package Version 2.0.  Version created to clarify intent of unit |
| Release 1 | This version first released with BSB Business Services Training Package Training Package Version 1.0. |

# Application

This unit describes the skills and knowledge required to identify and select suitable external advisory services for a small business or work area operation, and to monitor and review services provided.

It applies to individuals who use research and organisational skills identifying, selecting and monitoring specialist services or external contractors.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

# Unit Sector

Management and Leadership – Small and Micro Business

# Elements and Performance Criteria

| ELEMENT | PERFORMANCE CRITERIA |
| --- | --- |
| Elements describe the essential outcomes. | Performance criteria describe the performance needed to demonstrate achievement of the element. |
| 1. Locate specialist external advisory services | 1.1 Identify skill or knowledge gaps within the business to determine nature of external expertise required  1.2 Research specialist services to determine if there are any specific industry or regulatory requirements that apply  1.3 Prioritise services required by the business and document according to business procedures  1.4 Determine estimated cost of services and identify budget or funding source to purchase external expertise |
| 2. Select a specialist advisor or company | 2.1 Organise a quote or advertise for provision of specialist service according to business requirements  2.2 Establish process and criteria for shortlisting potential advisors or contractors  2.3 Select most suitable applicant according to established criteria  2.4 Document selection process and outcome  2.5 Ensure successful and unsuccessful applicants are advised of outcome and provided with feedback if needed |
| 3 Negotiate services to be provided | 3.1 Review and clearly specify terms and conditions of quotation or contract  3.2 Clarify and confirm what is required of specialist advisor, including expectations of performance and outcomes  3.3 Obtain and action legal advice on contract requirements, if necessary  3.4 Formally sign off on quotation or contract  3.5 Familiarise specialist advisor with the business and relevant personnel as part of induction |
| 4. Monitor performance | 4.1 Check milestones and deliverables are achieved according to terms and conditions of quotation or contract  4.2 Discuss progress and review against agreed terms and conditions  4.3 Collaborate to raise any issues or concerns, and follow-up and document  4.4 Organise progress and final payments against milestones and key deliverables in a timely manner  4.5 Evaluate effectiveness and suitability of specialist advisor in achieving objectives |

# Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

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| Skill | Performance  Criteria | Description |
| Reading | 1.2, 3.1, 4.1 | * Organises, evaluates and critiques information from a wide variety of textual material |
| Writing | 1.3, 2.2, 2.4, 2.5, 3.1, 3.2, 3.4, 3.5 | * Develops material for a specific audience using clear language and workplace conventions to convey explicit information, requirements and recommendations |
| Numeracy | 1.4, 4.4 | * Analyses numerical information to determine business costs and benefits, and analyse and compare usage data |
| Oral Communication | 2.5, 3.2, 3.5, 4.2, 4.3 | * Uses listening and questioning skills to confirm understanding of requirements * Participates in a verbal exchange of ideas/solutions and uses appropriate, detailed and clear language to address key personnel and to disseminate information |
| Navigate the world of work | 1.2, 1.3, 2.1, 2.3, 2.4, 3.3, 3.4, 4.2-4.4 | * Appreciates implications of legal and regulatory responsibilities related to own work * Adheres to organisational policies and procedures and considers own role in terms of its contribution to broader workplace goals |
| Get the work done | 1.1, 1.3, 1.4, 2.1-2.3, 3.3, 4.1, 4.4, 4.5 | * Applies formal processes when planning more complex/unfamiliar tasks, producing plans with logically sequenced steps, reflecting some awareness of time and resource constraints * In more complex, non-routine situations, uses a formal decision-making process with support, setting or clarifying goals, gathering information and evaluating several choices against a limited set of criteria * Recognises value of continuous improvement within own work context where this involves incremental change * Applies problem-solving processes when tackling an unfamiliar problem, breaking complex issues into manageable parts and identifying and evaluating several options for action * Uses both formal and informal processes to monitor implementation of solutions and reflect on outcomes |

# Unit Mapping Information

| Code and title  current version | Code and title  previous version | Comments | Equivalence status |
| --- | --- | --- | --- |
| BSBSMB411 Manage specialist external advisory services Release 2 | BSBSMB411 Manage specialist external advisory services Release 1 | Updated to clarify intent | Equivalent unit |

# Links

Companion Volume implementation guides are found in VETNet - <https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>