



Australian Government

BSBSMB411 Manage specialist external advisory services

Release: 2

BSBSMB411 Manage specialist external advisory services

Modification History

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
<i>Elements describe the essential outcomes.</i>	<i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i>
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

ELEMENT	PERFORMANCE CRITERIA
	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.

Skill	Performance	Description
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	Criteria	
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
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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>

Assessment Requirements for BSBSMB411 Manage specialist external advisory services

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Performance Evidence

Evidence of the ability to:

- locate and select a specialist external advisory service relevant to the business, that meets specific organisational requirements including:
 - identifying skill or knowledge gaps of the business
 - identifying relevant industry, regulatory and organisational requirements
- document selection process and outcomes according to business procedures
- agree on and document services to be provided with the successful advisor or contractor
- provide successful advisor or contractor with an induction program and ongoing feedback as required
- monitor milestones and deliverables, and evaluate effectiveness of specialist external advisory services against agreed terms and conditions.

Note: If a specific volume or frequency is not stated, then evidence must be provided at least once.

Knowledge Evidence

To complete the unit requirements safely and effectively, the individual must:

- outline key steps in engaging external specialist advisors or services
- describe negotiation and conflict-resolution strategies
- summarise business and industry requirements relating to specialist advisory services for the business:
 - required licences, industry registration, government approval, and professional membership

- minimum qualifications
- vendor approval or certification.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the Management and Leadership – Small and Micro Business field of work and include access to:

- relevant legislation, regulations, standards and codes
- relevant workplace documentation and resources
- case studies or where possible, real situations
- interaction with others.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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