



Australian Government

BSBSMB411A Manage specialist external advisory services

Release: 1

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Modification History

Release	Comments
Release 1	This unit of competency first released with <i>BSB07 Business Services Training Package v9.0</i> .

Unit Descriptor

This unit describes the performance outcomes, 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 the services provided.

Application of the Unit

This unit applies to individuals who use research and organisational skills in planning the introduction of new or specialist services, resources or processes.

Licensing/Regulatory Information

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

Pre-Requisites

Not applicable.

Employability Skills Information

This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements	Performance Criteria
<i>Elements describe the essential outcomes of a unit of competency.</i>	<i>Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.</i>

Elements and Performance Criteria

1. Locate specialist external advisory services	1.1 Identify skill gaps of current staff to determine the nature of the external expertise required to meet the business need 1.2 Research information about the specialist services to determine if there are any specific industry or regulatory requirements that apply to the service 1.3 Prioritise the services required by the business and document according to organisational procedures 1.4 Determine the estimated cost of the services and identify the budget or funding source to purchase external expertise
2. Select a specialist advisor or company	2.1 Organise a quote or advertise for the provision of the specialist service according to organisational requirements 2.2 Establish a process and criteria for shortlisting the potential contractors 2.3 Select the most suitable applicant according to the established criteria and the business' requirements and procedures 2.4 Document the selection process and outcome following organisational procedures 2.5 Ensure successful and unsuccessful applicants are advised of the outcome and provided with feedback if needed
3. Negotiate services to be provided	3.1 Review and clearly specify the terms and conditions of the quotation or contract 3.2 Clarify and confirm what is required of the 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 the quotation or contract following organisational procedures 3.5 Familiarise the specialist advisor with the business and its personnel as part of induction
4. Monitor performance	4.1 Check that milestones and deliverables are achieved according to the terms and conditions of the quotation or contract 4.2 Discuss progress and review against agreed terms and conditions in line with organisational procedures 4.3 Collaborate to raise any issues or concerns, and follow up and document according to organisational procedures

	4.4 Organise progress and final payments against milestones and key deliverables in a timely manner according to organisational procedures 4.5 Evaluate effectiveness and suitability of the specialist advisor in achieving the objectives
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Required Skills and Knowledge

This section describes the skills and knowledge required for this unit.

Required skills

- analytical skills to identify required expertise for the business
- communication skills to request and convey information to others
- literacy skills to interpret a range of contractual information, business documentation and technical specifications
- negotiation and conflict-resolution skills to finalise and monitor contracted services
- numeracy skills to analyse and compare data, including quotations and costs
- research skills to source and analyse information about advisory services.
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Required knowledge

- key steps in engaging external specialist advisors or services
- negotiation and conflict-resolution strategies
- organisational 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.

Evidence Guide

The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the ability to: - locate and select a specialist external advisory service relevant to the business that meets specific organisational requirements - negotiate and document the services required, including terms and conditions - monitor the milestones and deliverables, and evaluate the effectiveness of the specialist external advisory services.
Context of and specific resources for assessment	Assessment must ensure: - access to relevant documentation - candidate's individual business need is used as the basis for assessment.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: - portfolio of prioritised information relating to external expert services or specialist advice relevant to the business - oral or written questioning to assess knowledge of specialist services relevant to the candidate's business.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: - BSBSMB404A Undertake small business planning - BSBSMB405B Monitor and manage small business operations - BSBSMB410A Review and implement energy efficiency in business operations.

Range Statement

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

External expertise may include:	• accounting and financial planning • business development • environmental and sustainability expertise: • energy efficiency and clean energy • fleet vehicles and transportation • product expertise • review and audit experience • waste management and recycling • IT and computing: • cloud computing • supply of equipment • technical support • trade skills • legal • project management • research • training: • accredited • formal and non-formal.
Information may include:	• directories • government departments, such as: • Consumer Affairs • Office of Fair Trading • industry and professional associations • networks and recommendations • newspaper and online advertisements.
Specific industry or regulatory requirements may include:	• government approvals • licences, such as: • for financial planning • trade licences • industry registration • membership of professional associations • minimum qualifications

	• vendor approval or certification.
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Unit Sector(s)

Small Business