SFJGB9
Negotiate on behalf of clients

Overview

This unit is for you if your role involves you in negotiating on behalf of your client with other organisations and agencies. This is not the same as representing the client in formal or informal situations, which is covered in Unit DA3: Act on behalf of clients in informal proceedings and Unit DA4: Represent clients in formal proceedings

There are two elements

1 Exchange offers on behalf of clients
2 Establish an arrangement for clients

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Performance criteria

Exchange offers on behalf of clients

You must be able to:

P1 review the needs of clients
P2 identify a suitable negotiation strategy to achieve the needs of clients
P3 prepare suitable offers for clients that encompass their needs
P4 receive offers from other parties
P5 assess how far the offers achieve the needs of clients
P6 consult with clients on the offers that have been received
P7 recommend the next stages in the negotiations
P8 record details of the negotiations in the appropriate systems

Establish an agreement for clients

You must be able to:

P9 produce agreements that effectively meet the needs of clients
P10 incorporate all necessary details into the agreement
P11 ensure the agreement is capable of being implemented
P12 ensure the agreement complies with all relevant legislation, codes of practice, guidelines and ethical requirements
P13 confirm agreements with clients at appropriate points in the negotiation process
P14 provide a suitable rationale for any needs that cannot be met or any significant changes to the agreement
P15 produce the agreement in the required formats with the necessary supporting documentation
P16 record agreements in the appropriate systems

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Knowledge and understanding

Exchange offers on behalf of clients

You need to know and understand:

K1 how to obtain information on clients' needs
K2 what type of negotiation strategies are suitable for different types of issue
K3 how to prepare offers over a period of time
K4 when to present new offers
K5 how to receive offers
K6 how to assess offers and what different offers might signify
K7 when to consult clients
K8 the potential next stages in negotiations
K9 when to conclude negotiations
K10 what the systems are for recording negotiations and the procedures that relate to the use of these
K11 why it is important to use the systems

Establish an agreement for clients

You need to know and understand:

K12 what different types of agreement can be reached
K13 what types of detail should be included in the agreements
K14 how to check the feasibility of the agreement
K15 what factors might affect the agreement
K16 the relevant national, local, professional and organisational requirements relating to equal opportunities, discrimination, health and safety, security, confidentiality and data protection
K17 why it is important to comply with different requirements
K18 what the consequences are of not complying with different requirements
K19 how to obtain information on the requirements
K20 when clients should be consulted during negotiations
K21 what levels of detail clients require
K22 what types of change to the agreement might be required
K23 why it is important to provide a rationale for any changes to agreements
K24 what the different formats are for agreements
K25 what types of supporting documentation might be required
K26 what the systems are for recording agreements and the procedures for using these
K27 why it is important to use the systems

Additional Information

Skills

The skills you will need to enable you to deliver the service effectively are:

Exchange offers on behalf of clients
questioning
active listening
presenting information
negotiating
persuading
prioritising
reviewing
evaluating
recording and storing information

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