

SFJ GB9 – SQA Unit Code H55E 04

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

You need to know and understand:

Exchange offers on behalf of clients

- 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

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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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