

## Unit Title

**LA16                      Negotiate on behalf of clients**

## Summary

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 LA3: Act on behalf of clients in informal proceedings and Unit LA15: Represent clients in formal proceedings

The Unit requires you to:

- Exchange offers on behalf of clients
- Establish an agreement for clients

There are 2 elements:

No	Title
LA16.1	Exchange offers on behalf of clients
LA16.2	Establish an arrangement for clients

This Unit has been imported from the National Occupational Standards for Advice and Guidance revised by ENTO, December 2005, Unit AG11. It has been tailored in the format agreed for the NOS for Legal Advice.



**Element****LA16.1 Exchange offers on behalf of clients****Performance Criteria**

To meet the standard, you must be able to:

- 1 Review the needs of clients
- 2 Identify a suitable negotiation strategy to achieve the needs of clients
- 3 Prepare suitable offers for clients that encompass their needs
- 4 Receive offers from other parties
- 5 Assess how far the offers achieve the needs of clients
- 6 Consult with clients on the offers that have been received
- 7 Recommend the next stages in the negotiations
- 8 Record details of the negotiations in the appropriate systems

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

- questioning
- active listening
- presenting information
- negotiating
- persuading
- prioritising
- reviewing
- evaluating
- recording and storing information

**Knowledge and Understanding**

To meet the standard, you must know:

- a) How to obtain information on clients' needs
- b) What type of negotiation strategies are suitable for different types of issue
- c) How to prepare offers over a period of time
- d) When to present new offers
- e) How to receive offers
- f) How to assess offers and what different offers might signify
- g) When to consult clients
- h) The potential next stages in negotiations
- i) When to conclude negotiations
- j) What the systems are for recording negotiations and the procedures that relate to the use of these
- k) Why it is important to use the systems

**Element****LA16.2                    Establish an agreement for clients****Performance Criteria**

To meet the standard, you must be able to:

- 1        Produce agreements that effectively meet the needs of clients
- 2        Incorporate all necessary details into the agreement
- 3        Ensure the agreement is capable of being implemented
- 4        Ensure the agreement complies with all relevant legislation, codes of practice, guidelines and ethical requirements
- 5        Confirm agreements with clients at appropriate points in the negotiation process
- 6        Provide a suitable rationale for any needs that cannot be met or any significant changes to the agreement
- 7        Produce the agreement in the required formats with the necessary supporting documentation
- 8        Record agreements in the appropriate systems

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

- questioning
- active listening
- presenting information
- negotiating
- persuading
- prioritising
- reviewing
- evaluating
- recording and storing information

## Knowledge and Understanding

To meet the standard, you must know:

- a) What different types of agreement can be reached
- b) What types of detail should be included in the agreements
- c) How to check the feasibility of the agreement
- d) What factors might affect the agreement
- e) The relevant national, local, professional and organisational requirements relating to equal opportunities, discrimination, health and safety, security, confidentiality and data protection
- f) Why it is important to comply with different requirements
- g) What the consequences are of not complying with different requirements
- h) How to obtain information on the requirements
- i) When clients should be consulted during negotiations
- j) What levels of detail clients require
- k) What types of change to the agreement might be required
- l) Why it is important to provide a rationale for any changes to agreements
- m) What the different formats are for agreements
- n) What types of supporting documentation might be required
- o) What the systems are for recording agreements and the procedures for using these
- p) Why it is important to use the systems