

DACUM Research Chart for Business Advisor



business advisor

DACUM Panel

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Sponsored by:



Dún Laoghaire-Rathdown
County **Enterprise** Board

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DACUM Research Chart for Business Advisor

Duties		Tasks				
A	Implement Internal/External Policies	A-1 Identify Policy Documentation	A-2 Obtain Policy Documentation	A-3 Read Policy Documentation	A-4 Re-clarify Policy	A-5 Identify Impacted Areas
		B-1 Establish Client Contact	B-2 Research Client	B-3 Arrange Client Appointment	B-4 Capture Preliminary Client Details	B-5 Record Meeting Notes
		C-1 Ask Client for Proposal Explanation	C-2 Ask Client about their Background	C-3 Profile the Client	C-4 Identify Personal Support Network	C-5 Establish Tangible Resources e.g. Financial, Premises, Equipment, HR etc
		D-1 Review Business Proposal	D-2 Establish Strategic Fit	D-3 Review SWOT Analysis	D-4 Review Competitive Position	D-5 Verify Market Research
		D-13 Recommend Client Actions				
E	Develop Action Plan	E-1 Clarify Business Goals	E-2 Identify Key Actions	E-3 Match Resources with Needs	E-4 Identify Stakeholders	E-5 Determine Responsible Person(s)
		F-1 Advise Client of Supports & Benefits	F-2 Obtain Agreement on Supports	F-3 Explain Application Process (es)	F-4 Assist with Application Process (es)	F-5 Appraise Application (s)
		G-1 Identify Stakeholders	G-2 Categorize Stakeholders	G-3 Create Networking Opportunities	G-4 Forge linkages / partnerships	G-5 Manage Stakeholder Database
		H-1 Participate in Peer Learning Workshops	H-2 Participate in Continuous Professional Development	H-3 Participate in Local Clubs and Societies	H-4 Join Professional Organizations	H-5 Participate on Stakeholder Boards & Committees
F	Facilitate Access to Supports					
G	Manage Stakeholder Relationships					
H	Maintain Personal Development					

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A-6 Participate in Policy Training	A-7 Inform Stakeholders of Policy	A-8 Implement Policy	A-9 Monitor Client Compliance	A-10 Provide Feedback to Policy Makers		
B-6 Visit Client Premises	B-7 Clarify Client's Expectations	B-8 Define Service Parameters	B-9 Discuss Potential Outcomes	B-10 Identify Next Steps	B-11 Implement Agreed Next Steps	B-12 Conduct Regular Progress Review
C-6 Discuss Business Options	C-7 Establish Personal Expectations	C-8 Determine Eligibility for Other Supports e.g. coaching mentoring, training etc.	C-9 Invite Client to Ask Questions	C-10 Determine Client Commitment		
D-6 Review Cash Flow (s)	D-7 Review Financial Projections	D-8 Complete Resource Audit e.g., equipment, HR, location	D-9 Review Marketing Plan	D-10 Verify Regulatory Compliance	D-11 Determine Contingency Plan	D-12 Complete Proposal Evaluation
E-6 Determine Action Timelines	E-7 Evaluate Risks and Impacts	E-8 Establish Key Measurements	E-9 Monitor Implementation of Action Plan	E-10 Review Action Progress	E-11 Determine Corrective Action	
F-6 Forward for Formal Decision	F-7 Inform Client of Formal Decision	F-8-a Facilitate draw-down procedure, if approved	F-8-b Facilitate appeals process, if declined	F-9 Monitor compliance with terms & conditions		
G-6 Write Periodic Reports	G-7 Manage Complaints Process	G-8 Prepare Case Studies	G-9 Organize Peer Learning Events	G-10 Monitor Accuracy of Internal/External Communications	G-11 Promote Entrepreneurial Cultural Activities	
H-6 Seek Personal Development Opportunities	H-7 Review Professional & Business Literature	H-8 Perform Internet Research	H-9 Seek Performance Feedback	H-10 Coach Staff	H-11 Mentor Staff	H-12 Maintain Personal Training Records

General Knowledge and Skills

- Ability to challenge
- Ability to compromise
- Ability to set goals and prioritize
- Able to balance political issues
- Action planning skills
- Brainstorming skills
- Business knowledge e.g., new markets, exports, product diversification, different ways of doing business
- Business viability knowledge & understanding
- Communication skills
- Counseling skills
- Emotional IQ awareness
- Interpersonal skills
- Know when to handover
- Leadership skills
- Listening skills
- Local knowledge
- Negotiating skills
- Questioning skills e.g., probing skills
- Knowledge of information sources
- Use Management Information Systems
- Presentation skills
- Teambuilding skills
- Foreign languages
- Use of computers and related devices
- Use of specialized software

Tools, Equipment, Supplies and Materials

- PC/Laptop
- Internet/Intranet
- Email
- Mobile Telephone
- Microsoft Office – Word, Excel, PowerPoint, Access etc
- CRM software
- In-house information systems
- In-house control systems
- Project Management Software
- Sector Guides
- Company Search Facilities e.g., Irish Credit Bureau, Stubbs Gazette, Visionet

Worker Behaviors

- Balance personal v professional
- Trustworthy/honest
- Careful use of language e.g., jargon
- Efficient
- Encourage participation
- Impartial
- Inspiring
- Lateral ‘out of the box’ thinking
- Objective
- Credible/integrity
- Manage time
- Motivational
- Observant
- Positive attitude
- Presentable
- Responsible
- Empathetic
- Interested

Future Trends and Concerns

- Availability of funding
- Changing work schedules
- Communication technologies
- Devaluation of human capital
- Down sizing
- Economic climate
- Expansion of regulatory compliance
- Global markets
- Increasing changes to work practices
- Increasing diversity of clients
- Increasing workload
- Lack of personal communication
- Lack of security
- Managing diminishing resources
- Political change
- Re-structuring
- Social media
- Software becoming outdated
- Stress management