SLOVENSKI STANDARD

SIST-TS CEN/TS 99001:2008

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Podpora poslovanju - Storitve v podporo majhnim podjetjem - Terminologija, kakovost in delovanje

Business support - Support services provided to small enterprises - Terminology, quality and performance

Wirtschaftsförderung - Unternehmensentwicklungsdienstleistungen für kleine und mittelständische Unternehmen - Terminologie, Qualität und Leistung

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Services aux entreprises - Services d'accompagnement et de conseil aux petites entreprises - Terminologie, qualité et performances du service

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03.080.20   Storitve za podjetja   Services for companies

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TECHNICAL SPECIFICATION

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CEN/TS 99001

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English Version

Business support - Support services provided to small enterprises - Terminology, quality and performance

Services aux entreprises - Services d'accompagnement et de conseil aux petites entreprises - Terminologie, qualité et performances du service

Business support - Support Services für Kleinunternehmen - Begriffe, Qualität und Ausführung

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CEN/TS 99001:2008 (E)

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Foreword

This document (CEN/TS 99001:2008) has been prepared by Technical Committee CEN/TC 374 "Project Committee - Business Support Services", the secretariat of which is held by AFNOR.

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Introduction

To be effective, the provision of business support services to small enterprises should be based upon a common understanding between the managers of small enterprises on the one hand and the service providers on the other hand.

If both parties use the same methods, in the same spirit, the quality of the services will be improved, as well as the ongoing development of the small enterprise.

In order to show to each party the needs, challenges and obligations which the other party faces in the process of the provision of a business support service, this document is presented, where appropriate, in two columns, the left column containing recommendations for the small enterprises (SE), and the right column containing requirements for the service providers (SP).

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1 Scope

This Technical Specification establishes the general elements of a business support service of appropriate quality. The service should be tailored to the expectations of enterprises.

This Technical Specification specifies requirements on the business support service providers, as well as guidelines for enterprises, including self-employed persons. It focuses on the process of service provision rather than the nature or content of the service. It is not concerned with the internal organisation of either service providers or enterprises.

This Technical Specification can serve as a common reference for both enterprises and support service providers.

On the one hand, for service providers, it is intended to be:

— a reference tool for how to structure the services provided;

— a guideline for providing a service corresponding to actual needs and expectations;

— a guideline for improving the quality of the service.

It clarifies the type of information exchanged between service provider and service receiver, i.e. the enterprise.

On the other hand, it is intended to help the managers to detect and specify the needs of their enterprises and to get a suitable service by:

— expressing the needs of the enterprise;

— interacting with the service provider;

— choosing or seeking guidance on a suitable service provider;

— evaluating the service received in line with documented requirements and expectations.

This Technical Specification also contains some more detailed advice on drawing up contracts and placing orders. It is intended to be a practical tool for enterprises to choose and evaluate their support service providers.

This Technical Specification concerns all types of business support services, irrespective of the domain in question (commercial, financial, training, IT, legal, marketing, organisational, technical, general assistance, etc.), with the exception of facilities management described in EN 15221-1 and EN 15221-2 (see note). These services may be provided over extended or predefined periods (days, weeks or months), be performed by private or public organisations and be carried out within the framework of common business relations including direct payment of fees by the enterprise. It should be noted that, because the range of services offered by business support providers which fall within the scope of this document is very wide, not all possible elements of each support provision process are covered by this document.

This Technical Specification is not intended to serve as a basis for certification of the service providers.

NOTE   Facilities management services according to EN 15221-1 and EN 15221-2: services that support the main activities of the enterprise in order to improve its effectiveness via the management and provision of appropriate support services. Facilities management services are services relating to space and infrastructure (e.g. energy management, cleaning, office arrangement renewal) and/or to persons and organisation (e.g. access control, fire extinguisher maintenance, security, catering, shipping of merchandise, archiving and storage).

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2   Terms and definitions

For the purposes of this document, the following terms and definitions apply.

2.1
enterprise
entity engaged in an economic activity, irrespective of its legal form; this includes self-employed persons and family businesses engaged in craft or other activities, and partnerships or associations regularly engaged in an economic activity

[Commission Recommendation C(2003) 1422]

2.2
small enterprise (SE)
enterprise which employs fewer than 50 people and whose annual turnover and/or annual balance sheet total does not exceed EUR 10 million

[Commission Recommendation C(2003) 1422]

NOTE   The small enterprise can be at any stage of its life cycle: creation, growth, maturity or transfer. By their nature, small enterprises have few staff and may not have the management structures and resources of larger organisations. Therefore, one person can incorporate all operating functions of the enterprise.

2.3
micro enterprise
enterprise which employs fewer than 10 people and whose annual turnover and/or annual balance sheet total does not exceed EUR 2 million

[Commission Recommendation C(2003) 1422]

NOTE 1   The micro enterprise can be at any stage of its life cycle: creation, growth, maturity or transfer. By their nature, micro enterprises have few staff and may not have the management structures and resources of larger organisations. Therefore one person can incorporate all operating functions of the enterprise.

NOTE 2   In this Technical Specification, the term small enterprise (SE) is used for micro and small enterprises as defined by the EU as well as self-employed persons.

2.4
self employed
person working for oneself as freelance or owner of a business that has no other employees

2.5
business support service
service provided by a third party (either private or public) external to the enterprise, which involves providing advice, services or support of any kind and for any duration of time

NOTE 1   When services are provided within the framework of a policy initiated or supported by public authorities, these services can sometimes be funded fully or in part. In this case, services are often provided by public, para-public or semi-public structures (advisory committees, business start-up networks, for example).

NOTE 2   The support (or assistance) is primarily directed at issues faced by the manager of the enterprise in the exercise of his/her multiple business processes thus making it easier for him/her to take decisions based on improved control of the activities of the enterprise and its environment.

NOTE 3   Support can lead to specialised advisory service provision intended to meet the needs of the enterprise identified by the manager of the enterprise.

2.6
service provider (SP)
private or public enterprise, structure or organisation which provides business support services

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2.7
manager
person who directs and controls an enterprise (2.1)

NOTE   The term manager is used for the manager of the enterprise himself/herself or a person on a team of the enterprise or a group of people within the enterprise. In that case, we can use management or enterprise.

3   The phases of service provision

3.1   Description of the process

The service provision can be divided into three main phases:

1)   the selection of a service provider which includes the identification of the appropriate service provider, the analysis of the service offer and the contractual relations;

2)   the performance of the service (during the provision of the service);

3)   the assessment of the service.

For all the steps in this process, see Figure 1.

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Small enterprise (SE)   *Service providers (SP)*

Phase 1 - SELECTION

Identification of needs (4.1)

Preparation (4.2)

Identification of the service providers from which the enterprise may request an offer (4.3)

Analysis of the specific needs of the enterprise (4.4.2)

Consultation with the service provider(s) (4.4.1)

Elaboration and presentation of the service offer (4.4.3)

Final selection of the service provider (4.5)
Analysis of the service offers
Selection criteria and decision

Contractual relations (4.6)

Phase 2 : PERFORMANCE OF THE SERVICE

Organisation to be applied to ensure that the service can be carried out properly (5.1)

Release of the resources required for the provision of the service (5.1)

Modification of the service (5.2)

Significant modifications to the service agreed (5.2)

Monitoring and inspection of the service process (5.3)

Draft of follow-up indicators (5.3)

The end of a assignment (5.4)

Phase 3 : ASSESSMENT OF THE SERVICE

Assessment (6)

Assessment (6)

Ongoing improvement of the service (7)

Figure 1 — Description of the service process

3.2   General   (SE)

The decision to call on a service provider is ALWAYS the responsibility of the manager of the enterprise.

The initial need for a service may come from:

— the manager of the enterprise himself/herself who has identified the need for an external service to resolve a problem or to ensure that the activities of the enterprise are supported during the short or long term, or to make up for his/her lack of experience in a particular domain;

— the profession or public authorities encouraging the enterprise to engage in actions that are useful or indispensable for the business (adapting to regulations).

Engaging a service provider may prove useful, in particular during the business start-up process. It may ensure that the enterprise will benefit from appropriate support offered by certain support organisations during start up and early years of development.

A check-list (see Annex D) summarises all the stages of the service provision and the recommendations to the enterprise.

4   Description of phase 1 – Selection

4.1   Identification of needs by the manager of the enterprise   (SE)

At first, the manager of the enterprise shall identify his/her motivations and determine the objectives of his/her decision to use a service provider.

The manager of the enterprise should identify the need, type and availability of support services. For example:

— suitable level of support, temporarily or long term, of an activity by an external service provider in order to, for example:

  — retain the key resources of the enterprise;

  — perform services at a lower cost – for the same quality – than if they were carried out internally;

  — resolve problems relating to understaffing and/or under capacity.

— access expert knowledge in order to deal with problems which the enterprise cannot resolve by itself or to help it come out of its isolation by participating in a collective project.

— advice regarding strategy and development of the enterprise during its start-up phase and during the course of its life when it needs to begin a new stage in its development.

Several types of service providers exist. The enterprise should consider the differences between, for example:

— public organisations and institutions which provide pre-defined services;

— legal entities or private persons involved in free competition. This group includes organisations whose skills or services are regulated;

— professional associations, networks.

Public assistance mechanisms may sometimes lower the final cost of the service, either via aid provided to the organisation, which provides the support service or via direct aid to the enterprise.

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The existence of aid or a financing mechanism, which reduces the final cost of the service, is a selection criterion to be considered.

It is recommended that the enterprise record the needs for external service.

4.2   Preparation   (SE)

Where the need for a service provider has been identified, a plan for the service should be developed.

The plan should clearly outline the service to be provided, the results expected, the timelines for implementation and the intermediate outcome. The short or long term expectations for the service provision should also be included in the plan e.g. assuming that the service will become part of the enterprise or will be taken over by the service provider over time.

The plan should assess the available resources within the enterprise such as financial resources, allocation of manager/employee's time, predictable secondary effects (training, costs linked to changes, etc.). The management may be obliged to define the limits of the service provider's activity as early as this stage and thus the share of the service that will be carried out by the management and/or by the enterprise.

The plan should identify the criteria to be used for selecting the service provider (field of expertise, speciality) and the nature of the contract to be concluded (lump-sum contract, contract based on results, etc.).

Even if there is little time for the manager of the enterprise to search for a service provider or to express his/her objectives in detail, it is fundamental that he/she takes the time to formalise in writing the general objectives of the service that he/she expects. Otherwise there is a high risk that the service will not meet his/her expectations.

The manager of the enterprise may be assisted in defining the needs and objectives of the enterprise by a general service advisory body, a public service, a chamber of commerce or other type of chamber, federations or professional organisations. Although the enterprise should ensure that this support does not impair the objectivity and neutrality of the service provided if links with potential service providers exist.

4.3   Identification of the service providers from which the enterprise may request an offer (SE)

Once the plan for the service has been defined and documented, the search for a suitable service provider who is able to meet the needs of the enterprise can begin.

This identification stage may not be necessary where the enterprise has already previous experience with the service provider either directly or based on recommendations from a reliable source or if the initial impetus (see 3.2) does not come from the manager of the enterprise or if a pre-selection is communicated by an organisation on which the manager of the enterprise can rely.

A review of the suitable service providers will enable the enterprise to make a more informed decision on the most qualified and suitable service provider to meet the needs of the enterprise.

Factors to be considered in this review include:

— internal quality assurance system: the service provider has made the effort to guarantee a certain level of quality;

— quality label delivered by an independent organisation: certification (EN ISO 9001 for example), professional qualification, badge or charter of professional organisations, etc. This quality label is important because:

   — the service provider has made the effort to obtain a label and is thus obliged to ensure that an independent organisation evaluates its professionalism and the quality of its services;

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