Link Up Start Up and Initial Assessment

Additional support and range of qualifications available

If customers are not ready for the NEA programme they can be signposted to an array of Pre NEA programmes

A range of Pre-Start qualifications where available will be offered for participants such as Introduction to Market research or exploring Enterprise

PARTICIPANT JOURNEY (1-15 days) Initial referral comes from JCP to Peopleplus over the phone to arrange Link up Start up Workshop Link up Start up Workshop with experienced **Business Advisor** Attendance registers complete. Prap and our CRM updated. Business Advisor will be available afterwards for 1 on 1's **Participant** Interested in NEA No Participant is not referred to NEA at this

stage

Yes

Participant is referred by JCP WC to attend

Initial Assessment (IA) within 10 days from

referrals. Prap updated either way

On completion of IA participant either

progresses to the Advice to Trade (next

page) or return to JCP with action plan

PARTICIPANT JOURNEY EXPANDED

PeoplePlus (PP) has vast experience at delivering LU:SU's like this and participants will benefit from expert knowledge of the sector, In work benefits and Universal Credit (UC)

In large volume locations these will be arranged on a loop so JCP staff know where and when each one is taking place

Likewise, PP will be flexible in low volumes areas, and can cater for smaller numbers or virtually

'Your Call to Action' Participant Progress Report (Plan) handed out at start, including sections on Universal Credit, explain self-employment and NEA, highlights next steps and action points for participant

In some cases, the participant may not be ready for NEA at this point but could be at a later date. Participants like this can be referred to a range of Pre-Start support available in the area like Princes Trust and personal development qualifications

- Participant attend IA and Initial diagnostic undertaken within 10 days by experienced Business Advisor, 1 on 1
- Business Advisor take Participant through 6 Point assessment plan
 - 1. Initial needs questionnaire
 - 2. Idea viability, done it before?
 - 3. Business Motivation and Strengths
 - Barriers
 - 5. Tools and Equipment for the job
 - Financial/Personal Situation/UC

'You're Call to Action' Plan updated with progress and next step

- If Participant not ready:
 - Feedback and action plan provided
 - Business Plan Template provided
 - Signposted to pre-NEA support or specialist
 - Re referrals process explained

ADDED VALUE

PeoplePlus staff to spend time with JCP advisors, providing feedback, educating and training.

- All JCP invited to attend a Start-up Link up workshop
- Ongoing work with JCP on how to refer, how to identify participant and what self-employed & UC is/means

PP has an expert understanding around UC and will explain how the gateway Interview, monthly reporting and the Minimum Income floor (MIF) works and include a demo of a UC Calculator fully explaining the MIF and expectations of income for customers

The sessions will be full of innovation and we will use ice breakers and interaction like Dragons Den and Ideas Generation activities to tease out the potential participants for the full programme

This session, can be tailored and delivered to Cohort specific groups where numbers allow, like Construction workers or Loan parents

Participants taken through detailed Pro's and Cons of self-employment, benefits and misconceptions, Q & A

Introduction to PP's range of resources, information, videos, podcast, articles and templates

For participants with clear business idea then start the NEA programme and are assigned a Business Advisor

- Introduction to NEA program and set expectations
- Set up next 1:1 meeting and Participants assigned Advisors based on geography, preferred learning styles and where possible sector specialism
- Introduction pack given/sent to customer, including 5 versions of BP templates, cash flow etc.

Advice / Mentoring to Business Start Up

Additional support and range of qualifications available where available

Level 1 & 2 Qualifications where available include:

Business planning workshops

Introduction to Market research

Business planning

Cash flow forecasting

Marketing on a shoe string

Tax doesn't have to be taxing

Online Marketing

Websites for SME's

Social Media & SEO

Participant JOURNEY

Our core NEA Business Advice/Mentoring provision consists of a minimum of 3 appointments (at least 1 Face to face). Topics include, but not limited to:

- Business Planning and cash flow forecast
- Market research
- · Marketing on and offline
- · Book keeping, tax and finance
- In work benefits and Universal Credit, MIF
- · Social Media and Websites
- · Sales, customer service and growth
- · Ongoing support via, email, text, Enterprise App
- All interactions will be captured on the participants Your Call to action plan, that is SMART and agreed by the participant
- An overall service to create a coherent, sustainable and bespoke business plan which is developed and reviewed at every 1: 1 session

Participant signposted to additional qualifications and support.

A series of Additional seminars in Non qualification form is also available alongside core programme, and as a minimum Finance and Marketing seminars will be delivered to every customer

The Business Plan is then assessed, and participant informed. If ready, participants start trading and allowance starts here. Participants have the option of an additional 13-week Business Development phase. In this phase participants will be offered a range of meetings and seminars with at least 1 point of contact with a specific mentor. The 'Your Call to Action' plan is completed to focus participant in achieving trading status within 13 weeks

Participants progress to trade (26wk to 52wk, next page) or return to JCP and made leaver on PRAP

Participant JOURNEY EXPANDED

- Participant now enters the 12-week period and PeoplePlus deliver 3 x appointments.
- The topics are flexible and can be adapted to the participants needs. The topics are based on surveying our current NEA Participants and asked what training would be most useful/required
- Order and work through loan applications if required
- Assess progress on business plan, ongoing
- · Book onto skills courses if required
- On-going mentoring, each meeting evidenced and documented on PeoplePlus CRM
- Introduction to the Business Plan Assessment tools
- Personal Financial Planning and survival budget
- Additional Seminars are available on an Ad Hoc basis and are available during this 12-week period and also after they have signed off
- Barriers reviewed, sign post where appropriate to additional partners. If Participant drops out here, PRAP is updated and participant referred with feedback to JCP

Final Business plans are assessed using independent experienced business mentors or panels. When participant is ready to Trade:-

- Support to submit any in work benefit or loan application forms and Register HMRC
- Prepare participant to attend Gateway Interview if a UC Participant and set up monthly reporting RTI
- Sign off JCP and start allowance, gather evidence
- Explain In-Work Support help available and assign mentor if appropriate
- Gather evidence to support

Added value

- Participants on programme will get access to:-
- Networking events—sector specific, cohort specific, external and some organised by participants
- Access to specialise Volunteer mentors, advisors and associates
- Resources, fact sheets, help guides, Videos, Podcasts, templates
- Opportunities to Crowd source and Crowd fund
- Range of online training modules
- Access to bank of business ideas
- Participants will benefit from PeoplePlus's partnerships with for example:
- Chambers of commerce
- Banks
- FSB
- Discounted office space
- Discounted business cards
- Media packages

26 and 52 Weeks

Additional support **Participant JOURNEY** Participant JOURNEY EXPANDED Participant enters in work support and sustainment period and is PeoplePlus offers 4 x face to face meetings in the contacted monthly by PeoplePlus 52-week period as this has proven to help participants sustain, recorded through 'Your Call to Action' participant progress report Participants are offered a minimum 2 face to face meetings in the Support with growth strategies facilitating case first 26 weeks management approach with growth provision in the region Levels 1 & 2 Qualifications Participants are offered a minimum 2 face to face meetings · Understanding their MIF and working towards still available during this between 26 and 52 weeks period • Telephone support line open 8am to 8pm Continuous option to contact Business Advisor monthly and regular workshops; drop in sessions and networking events PeoplePlus offer a cutting-edge Email and Text available for participants to attend alerts service. This includes:-· Reminders to participants of key dates like Self-Assessment and submission dates **Growth strategies** Seminar topics to be customer led but will include popular topics • Updates on tax laws, the budget like Growth, Sales, Marketing, Business reviews etc. · New resources available. like updated marketing Customer service and guides and Podcasts Sales · Continued access to PeoplePlus's range of Marketing and Sales Customers receive text and email alerts reminding them they qualifications where available have Skills courses available at any time or when they have Reminders of appointments with Advisors and Importing/Exporting booked on them, plus industry related news and updates dates of workshops, seminars and networking events Tendering **Digital Marketing** Customer completes 26-week NEA allowance if haven't signed Gather final evidence and update PRAP when off already. PRAP and CRM Updated Web design participant completes 26 and 52 weeks · Ongoing help with recruitment, payroll and Social Media & SEO business resources as the business grows Customer completes 52 weeks trading. PRAP and CRM Access to Advisers as and when required updated, and further growth support identified if required

Continued support throughout the period

ADDED VALUE

- Array of networking events and groups available in region
- Customer lead training and group sessions available
- Continued support available, with access to advisors and case management partners
- On-Going sign posting support with local Growthrelated services i.e. Growth Hubs, chambers
- Access to and continued discount to professional services i.e. accountants
- Peer to peer support groups

Existing Business

PARTICIPANT JOURNEY

Referrals come in from JCP into our call centre and participants are seen within 10 working days for Initial Assessment (IA)

Initial Assessment will be a face to face diagnostic and review of the business to assess growth potential and current situation

PRAP and CRM system updated with progress

If successful participants then enter the 12-week mentoring phase, with a minimum of 3 one to one meetings and 2 seminars.

The BDGP is then assessed and feedback to participant. PRAP and CRM updated accordingly

Participant enters post BDGP growth and support phase, receiving text and email alerts and have continuous access to their business mentor

1-6 months – Participant works towards achieving their MIF, Prap and CRM system updated. 2 mentor meetings will be offered plus access to the ongoing seminars is available also

6-12 months – Participant works towards achieving their MIF, Prap and CRM system updated. 2 mentor meetings will be offered plus access to the ongoing seminars is available also

Continued support throughout the period

PARTICIPANT JOURNEY EXPANDED

PeoplePlus will work and train JCP Advisors, encouraging them to call and ask any questions or test a customer's suitability for the programme

Initial Assessment helps the PeoplePlus Advisor and the customer understand the current state of the business and will include information requests on things like, turnover, costs and encourage participant to bring any existing information to the IA. Like the original Business Plan

At the IA a detailed assessment of the current state of the business will take place utilising the **6-point diagnostic tool** which includes:-

- 7. SWOT and GAP analysis
- 8. Financial appraisal
- 9. Growth Value Added potential
- 10. Business performance and barriers
- 11. Tools and Equipment for the job
- 12. Personal Situation/UC/MIF

If participants are not suitable or viable they will be referred back with feedback or signposted to other suitable

Key topics for one to one **Growth Management meetings** and seminar workshops will include

Growth indicators, Marketing and Sales strategies and plans, finance and pricing, business make over's, web design etc

BDGP are assessed using independent experienced business mentors or panels and participants informed of the outcome

Email and Text alerts service. Reminders to participant of key dates, like Self-Assessment and give dates of workshops, seminars and networking events. **Also 8am to 8pm Support line**

ADDED VALUE

- Participants on programme will get access to:-
- 4 meetings offered in 52-week sustainment period
- Networking events—sector specific, cohort specific, external and some organised by participants
- Access to specialist Volunteer mentors (where available), advisors and associate
- Unlimited resources, fact sheets, help guides
- Opportunities to Crowd source and Crowd fund
- Range of online training modules
- Free business directory listing
- Access to PeoplePlus database
- Free Podcasts and Vodcasts
- Participants will benefit from People Plus's partnerships with for example:
- Chambers of commerce, Banks, FSB
- Discounted office space
- Discounted business cards
- Media packages
- Support with recruitment
- Contact building and introductions like UKTI
- Partner networks and on-Going sign posting support with local Growth-related services i.e. Growth Hubs, chambers etc
- Updates on tax laws, the budget
- Access to and continued discount to professional services i.e. accountants