# ICT Escalator web-application customer journeyS:\Innovation and Enterprise Service\Partnerships\Projects\ICT ESIF\Templates\ERDF logo.jpg

The customer journey in ICT Escalator is as follows –

|  |  |
| --- | --- |
| The ICT Escalator Customer Journey | |
| Customer First Contact | Direct from customer/ via website/ via Velocity Growth Hub (VGH)/ via Chambers/ via councils/ via FSB/ via direct contact from University of Bedfordshire and The Open University / via telemarketing/ via Go On UK. |
| Telephone triage | * Invitation to next road-show meeting * If unsuitable for project, immediate signpost to VGH, Velocity Workshops, Chamber/ UKTI or other programmes * Arrange face - to – face meeting, * Register on project website – capture essentials such as SME status, de minimis statement, company sector, data protection info. |
| BroadHub | * Opportunity to see current tech, work through elements of self-assesment, enrol onto workbook-led ROOC delivered via online resources, advertise own services, recruit other services from suppliers, be introduced to supply chains for large companies, meet with Local Authority representatives. May be signposted to introduction programmes such as GoOnUK/ CyberStreetwise |
| Online Resources | * Learning from the online course content * Questionnaires to define capabilities, outputs include online training, signposting to other services, client understanding of their current offer within their marketplace * Carry out cybersecurity self-check Direction to CyberStreetwise |
| Triage | * Assess business needs, aspirations, growth potential * Explain Innovation Vouchers, VGH, UKTI, SMART * Explore suitability for Velocity Innovation Project and specific Velocity Growth Workshops. * Complete initial paperwork (see sample triage form) * Define area of expertise where help is required and suitable timeline for help * If appropriate, develop user registration on website to inform regional champions of the client’s abilities/ offer * Introduction to Police cybersecurity team for the region to establish basic levels of protection regardless of continuance within the project |
| Knowledge Base Expertise | * Meet with client, scope project, draw up contract inc deliverables, * Carry out work together, define next steps. * Deliver final report, with summary for next board meeting. * Signpost to VGH/ Chamber/ UKTI/ local councils as appropriate * Complete follow on KTP/Innovation Voucher applications as appropriate * Introduce other network opportunities * Progression up ICT Escalator * Collect client feedback via website |
| 3 way partnership | * Define project scope & timeline, introducing capability grant element where appropriate, also integrate security management * Appoint intern & academic expert * Meet with client, scope project, draw up contract inc deliverables, carry out work together, define next steps. * Deliver final report, with summary for next board meeting. * Signpost to VGH (all clients who complete this stage) * Signpost to Innovate UK funding options/ competitions * Collect client feedback via website |
| 30% ICT Capability Grant | * Businesses who have been supported by academic expertise will (at that point or any further point in their ICT Escalator journey) then have the option to progress to applying for the ICT Capability grant to assist them with implementing new ideas, processes and platforms. The grants may be used for further engagement with the knowledge base, specialist consultancy or to purchase capital equipment (total value £10,000 per SME, grant element £3,000 per SME). Grants will be offered to companies at a total intervention rate of 30%, requiring a company to match the grant by a minimum of 70%. * The SME will complete a grant application which will be submitted to the BPM and appraised by the Compliance Manager against a set of criteria, developed in line with the application form. * Recommendations submitted to the grants panel and will reflect the linkages to the individual SME’s business plan developed through the initial stages. * The panel membership will include the programme sponsor, the, at least 3 of the strategic partners, a Regional Champion and a representative from the LEP. The BPM will present the application to the board, with supporting evidence from the Compliance Manager. * Successful applicants will then be supported to ensure they comply with ERDF procurement requirements in their tendering for services and product development support. * The business, after approval, will purchase the item – goods or service in full compliance with ERDF procurement rules. * Client will then claim back the grant element once the evidence has been approved - such as evidence of payment from the bank account and evidence of the delivery of the good and services. |
| Data Hungry Development | * Where projects are deemed to require extensive broadband useage with the potential for significant innovation, they will be introduced to tools which can access the ongoing regional projects; KMI/ MKSmart, with previous experience of this work. * Introduce other collaborators from within ICT Escalator if appropriate * Define project scope & timeline, introducing capability grant element where appropriate * Appoint intern & academic expert * Meet with client, scope project, draw up contract inc deliverables, carry out work together, define next steps. * Deliver final report, with summary for next board meeting. * Signpost to Innovate UK funding options, competitions, especially SMART/ H2020, collaborative R&D, advise to discuss R&D tax credits with VGH. * Collect client feedback via website |
| Project Board Meetings | Review summary of all interventions this quarter, review feedback from website, suggest improvements, ensure all clients are still being looked after whether within or without ICT Escalator. Consider grant element applications |
| Regional Champions | Promote networks & the products/ abilities of all ICT Escalator companies at trade shows/ demos/ expos across the world. Create online network of SEMLEP capabilities. Attend road-shows. |

## The web application

Background Data – Academic is linked to school, school is linked to Faculty, each school has a Head of Department (of type Academic Expert), and each Faculty has a Dean (also of type Academic Expert)

**Static Pages**(text/ graphics/ hyperlinks)

Home page, More info, state aid info, The SEMLEP area (simple map with no pins), Definitions, Other help available/

**Dynamic Pages** (fed from data within the site)

areas of expertise, grid view from taxonomy

Map page showing pin locations by postcode of the registered clients, with pin linked to that user’s website.

Events page - Map page showing locations of roadshow events, each pin (approximately 24 events in total over 3 years) links to an “event” content type, showing dates/ times/ agenda etc. Users can register to attend an event by clicking a button. Users may attend more than one event.

Broadhub – a site within a site, potentially. This will allow registered users to access an online course(s). The course will be mostly delivered by text and video, it may be delivered by an external site which is reflected within an internal “ICT Escalator site window” so that the user does not leave the web application.

Client Workbook – range of pages of “Book” type that the client fills in if they wish, to indicate what level of ICT understanding they already have, point out basic checks they can do to improve their security, use of web etc. One client has one workbook. This can be viewed by BPMs and academics.

Referral Action – the client has been referred to another provider (that provider will be set up as a user of the system, the BPM will click a “Refer Client” button and select the provider from a user type “Strategic Partner” – this will generate an automatic email to the partner with the client’s registration information)

## Academic Experts Registration Form (which also creates user account?)

Title / name / subject specialisms (perhaps select from range of taxonomy?) / email address/ School (from drop down list) and Faculty (pre-determined by school) / contact phone/ room number/ campus location (from drop down list). Gender

The user should be able to add subject specialisms to the list. This will be referred to again later.

(On registration for this type of user, an email to be sent automatically thanking them for signing up, cc’d to [businesspartnership@beds.ac.uk](mailto:businesspartnership@beds.ac.uk))

## Business Registration form (which also creates user account?) –

Form ref/ Date of enquiry (auto) / Business contact Name / Email\_address / web address/ Business\_name / Business\_address / Post Code / Contact\_number / Business\_age / Legalstructure (Select from list) / Description\_of\_your\_main\_business\_activities / What\_is\_the\_annual\_turnover / How\_many\_employees / Issues you would like help with (memo) / UoB Contact (Select from list of users of specific type) / How did you hear about this project / Comments / Would like to exhibit at roadshows (Y/N)/ Company registered number if applicable/ Gender/ Ethnicity

(On registration for this type of user, an email to be sent automatically thanking them for signing up, cc’d to [businesspartnership@beds.ac.uk](mailto:businesspartnership@beds.ac.uk))

Each business will be assigned a Business Partnership Manager after registration. This link should be visible to the client when they view their own account info later on, but the client cannot select the BPM. The BPM user will select the client, creating a link in the database. One BPM has many clients, one client only has one BPM.

## Triage Form

Customer Info auto-populated from above. Additionally some fields for tick box such as

|  |  |  |
| --- | --- | --- |
| For sole traders: Are you registered with HMRC to pay yourself a salary? | Yes | No |
| Do you have a Sustainability Policy? | Yes | No |
| Do you have an Equality and Diversity Policy? | Yes | No |

|  |  |  |  |
| --- | --- | --- | --- |
| Forecast outputs: please tick and provide estimate of scale where available | | | |
| C1 | Number of enterprises receiving 12 hours + of business support from the University |  |  |
| C2 | Number of enterprises receiving grants |  |  |
| C4 | Number of enterprises receiving non-financial support |  |  |
| C5 | Number of new enterprises supported |  |  |
| C6 | Private investment leverage (only applies to C2s) |  |  |
| C8 | Employment increase in FTEs of 12m + |  |  |
| C28 | Number of new enterprises supported to introduce a new-to-the-market product |  |  |
| C29 | Number of enterprises supported to introduce a new-to-the-firm product |  |  |

One more memo box – “If the University could provide you with a consultant to help you, free of charge, for a few days initially, what exactly would you want them to do for you?”

Finally, a “what area of help does this fall into?” which offers a list of the subject specialisms (grid view?). The client can select up to 3 choices. This form when saved can automatically be emailed to all the academic experts who have any of those subject specialisms, with some accompanying text asking them to contact the BPM linked to the client if they are interested in working with this company.

## Consultancy Initiation Document

Mostly pre-populated with client details, plus a background field which is taken from “Issues you would like help with (memo)” field in sign up.

Select linked Academic from drop down list of users of type Academic Experts

**Section Title - Project Plan**

What are the agreed milestones (up to 5 milestones)

5 separate fields, Milestone 1, Milestone 2 etc, memo style

**Section Title - How this will be achieved**

5 separate memo boxes, free text. Notes to help on this would say “You could achieve this by (eg) taking a survey and analysing results, Interviews with xyz, Phone calls, site visits, literature reviews, benchtop testing, user testing”

**Section title - Benefit to the Client**

Memo field – Notes to help on this would say “eg What is achievable for the first stage of the project? Will it affect the client’s turnover? Prove a concept? Prove feasibility? Help attract investment? Remove risk of further development? Open the gateway for further funding?”

**Section title - Key Dates (all date fields – short date format)**

Start date of project

Mid-point for interim feedback to BPM

Date of final report submission

**Section title - Completion meeting**

Date, time and venue of completion meeting – ( 3 fields, only to be editable by certain users – not clients and not academics)

**Section title - Authorisation**

Signatures for the 4 people below (basically let’s do this by getting users to enter their passwords or by sending them an email and checking the user has replied by clicking a link, rather than printing things out and getting a wet signature)

Academic / Date

Client / Date

Business Partnership Manager/ Date

On completion, a client should only be able to amend until they click a “Finalised” button or something similar, then they should not be able to make changes. Admin/ BPMs should be able to make changes to this form. On completion, a copy of the form should be emailed to the Head of Department related to the Academic, ideally with a button that says “I am aware of this project and happy for the academic to proceed” or “Please contact me about this” – each of which triggers appropriate action (store “approved by HoD” or “action – contact HoD” sent to BPM)

## Interim Report Form

Take all the data from Initiation document – plus boxes below – the academic expert fills this in. This should be automatically emailed to the academic linked to the project 2 days before the date given for the interim report. Better if the academic gets a link to the web application and fills in the box within the application, so it is automatically stored online.

|  |  |
| --- | --- |
| Actions | |
| **The project is ongoing under original agreement** | YES/NO |
| **The project targets/outcomes have changed** | YES/NO |
| **If yes, what is the revised expected outcome** |  |
| **Potential for Grant application** | YES/NO |
| **Date client updated by Academic/ Business Partnership Manager** |  |

When completed, an email saying “The interim report has been updated” is sent to BPM associated with the client (possibly also to client)

## Final Report Form

The fields for this have not yet been finalised, but much will again be populated from the information already gained in earlier forms. The academic will then have some basic information to enter into the Final Report Form, and they must have the option to attach the actual final report as a Word or Pdf document. The final report may contain appendices, so they should have the option to attach more than one file, including image files. Movie files will be excluded to limit storage requirements.

## 3-way partnership form

This is another version of the Consultancy Initiation Document, most of the fields are exactly the same, but with the addition of a “Graduate Placement” user type, who will be embedded in the company, overseen by the academic. The graduate must therefore sign this 3-way partnership form in addition to the other signatories. Interim reports will be generated every 2 weeks from the project start date until the project end date.

## 3-way partnership interim report

This is filled in online – automatic reminder sent as an email to the graduate to fill in online. Each 3 way partnership may have many interim reports. Format is similar to the other interim report.

## 3 way partnership final report

This is exactly the same as the other Final report. It is important to note that a client can have one “consultancy final report” and one “3 way partnership final report”

## Data Hungry Development

In essence, this is the same as the 3-way partnership form but the projects will run for slightly longer. The main difference is that it should be tagged as Data Hungry Development, but other than that it is a repeat of the above.

## 30% ICT Capability Grant

This requires users of type “Strategic Partner”

The client will fill in text fields to apply for a grant. Usual user data plus memo fields and some number fields to represent currency (for later arithmetic).

When a grant application is filled in (one grant per one client) and saved as “Submit” then an email is sent to the Compliance Officer (specific email address).

When the Compliance Officer has reviewed the application, they mark it as “I certify this grant is eligible under ERDF rules” (tick box/ click button) which stores the date and user that clicked the box. A notification is then emailed to the Project manager to click another button “Send to Panel” – again the date sent and the user that clicked the button is recorded.

The grant application will be emailed to all “Strategic Partner” users who have ticked the box “Grant Panel Member” together with a link to login to the approval form (below)

A grant is linked to approvals (separate form)

## Grant Approval Form

The Strategic Partner will fill in an online form to approve or reject a grant. Form fields are expected to be

“background info of Strategic partner” from their user account,

“Background info of client” from the client user account,

Application Reference Number

3-4 memo fields that the panellist uses to comment on whether they believe the grant should be given.

A Yes/ No box indicating that the panellist does or does not approve the grant.

A grant must receive a score of 3 Yes votes greater than the number of no votes – ie 3-0, 4-1, 5-2 to be approved by the panel.

When approved in this manner, a notification is sent to the Project Manager user to begin the grant making process.

## Grant monitoring

When a grant has been approved, the user must be able to upload supporting documentation for that grant in electronic format (ie proof of spending, 3 quotations etc). This is a single content type which should have an accompanying simple form explaining what the item being stored is.