

Sprint 1 – Business process sprint

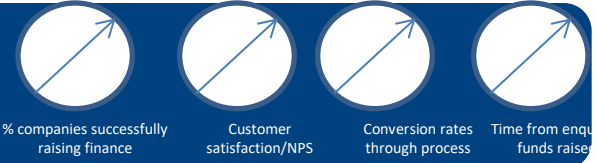
User needs

28 Feb 2017 (draft)

Financial readiness – Sprint 1

Goal: to transform the financial readiness service provided by Scottish Enterprise to companies looking for funding. Ensuring all customers receive an excellent end to end service.

Financial Readiness Customer Experience Journey KPIs:



- I am looking for funding for my business (to help it grow)
- I am searching for funding information, guidance and funding online
- I am talking to my peers and networks
- I am receiving relevant information about accessing finance via my preferred channel(s)
- I know what the Financial Readiness service is and how it could help me
- My networks are talking positively to me about the Financial Readiness Service
- I know how I can get access to the FR service and when I need to
- I can see how businesses like mine have benefitted from accessing the service

- I can easily find information online about accessing finance
- I can start to assess my company's financial readiness and clearly see the next steps I should take
- I can save the information I have generated securely and complete tasks in my own time
- I have a clear idea of what my funding plan should look like and what has to be in it
- I am aware of the support eco-system and how SE as part of that can help me
- I know what to expect when I get in touch and what information I will need to provide
- I know how long it will take to get a response
- I can network with other businesses like mine
- I can easily apply for a FR grant

- I can easily get in touch with SE through my preferred channel
- I get a fast response tailored to my need
- I know exactly what is happening now, what will happen next and what I need to do
- I provide details relevant to my initial enquiry. It is quick and easy
- I don't have to repeat information I've given before
- I can easily have a conversation with SE
- I am contacted by SE to set up a meeting if appropriate
- I am confident my adviser understands my request
- I can monitor the progress of my enquiry, applications and review my information securely
- I receive my FR grant (if appropriate)

- I know what detailed information I need to provide and why
- It is easy to provide the information required
- Everything is easy to understand
- I don't need to provide information I've provided before
- I have a contact name within SE
- I am getting tailored and bespoke information as a result of the information I have given
- I know what will happen next and how long it will take
- I am starting to understand the financial readiness state of my business and potential next steps

- I receiving valuable support from the service and help for my business
- I have a clear plan that summarises the information that I need and what I need to do to secure funding
- I know how likely I am to get finance and where I can access it
- I have confidence that I know what is needed and the next steps for my business
- I know which funders to approach, how to apply for and access the funding that is right for me
- I know which funders to avoid
- I know the strengths and weaknesses of my funding proposition
- If I am unlikely to get funding, I understand why and what I need to do next
- I feel confident and supported

- I continue to receive information that is relevant to my funding journey
- I can easily re-engage for further support
- I know how to get back in touch when I need to
- SE is getting back in touch with me
- I am satisfied with the service and advice and would use it again
- The service really helped me secure the finance I need now and will need in the future
- I can easily provide feedback and I know my comments will be acted on
- I would recommend the service to my networks
- I will be confident about accessing other SE services

User needs

As a customer accessing FR help...

I need...a simple illustration summarising the steps I need to get funding

So that ... it makes it **easy** for me to understand the process

As a customer accessing the FR service...

I need.. you to stop giving me too much information

So that...I don't need to wade through it to find the information relevant to me

As a customer accessing the FR service...

I need... information tailored to me and my situation

So that...so I can make an informed decision quickly

As a customer accessing and using the FR service...

I need... you to get back to me when you say you will

So that...I am not left feeling frustrated

As a customer accessing help from multiple organisations...

I need... the interaction between you and Business Gateway to be seamless

So that I get as joined up and smooth a customer experience as possible

As a customer thinking about how I can get financial help...

I need... you to help me create a business plan at an earlier stage in the process

So that... I get off on the right footing and have a better chance of success

User needs

As a... customer receiving help from FR service
I need.. feedback across the system/orgs
So that..I am kept up to date with what is happening

As a... customer receiving help from FR service
I need to have a simple staged process
So that..I have an outline of what needs to be in my plan

As a... customer receiving help from FR service...
I need... you to listen and communicate with me throughout the whole process
So that...you understand my needs and I **am** kept fully informed of what's happening

As a... customer accessing FR help
I need... you to provide my company with an overarching funding strategy
So that...I can successfully get my idea off the ground (is this right?) **I think this was also related to the fact that the customer could not access different funding types concurrently so help with the funding strategy would have outlined what he could do at what stages**

As a...customer who is not sure what FR help I could get
I need...you to help me figure out what is available to me
So that...I apply for the right help and don't miss out on opportunities

User needs

As a customer using the FR service
I would like...to be able to chat to you online
So that..I don't always have to meet you in person

As a customer accessing the FR service
I need SLAs that we all work to
So that.. I fully understand what expected of me and what I will get back

As an SE customer... looking to grow my business
I need... a plan
So that... I get off on the right footing and have a better chance of success

As a SE customer... getting help from FR service
I need... a template for recording my fund raising journey
So that...(what was the reason for this need?) **so that I can keep track of progress with funders and to provide relevant updates for them**

As a SE customer... seeking help from FR service
I need.. you to give me key critical advice early on in the process
So that I make the right decisions (EIS) **is this our EIS - what is the relevance of EIS here?**

User needs

As a...customer receiving help from FR service

I need... simple signposting

So that... I can link up with people / contacts

As an... inventor trying to get my idea off the ground

I need... you to help me help me network

So that... I can network with other like minded people (inventors) as I don't know any

As a... customer not sure of what help I can get from SE/FR service

I need... you to help me get oversight of what is available to me by way of events etc

So that... I can take up other opportunities that might help me

As a... customer using the FR service

I need... another point of contact when my account manager is not available

So that... I know who to go to for help and advice in her absence

As a... customer trying to contact you via your website

I need... you to respond quickly (within a couple of days)

So that...I don't have to resort going directly to my account manager because it's quicker

User needs

As a... customer completing form for financial help

I need... to know what information I need to complete forms

So that... I have it to hand at the outset and don't have to stop and start filling it in

As a... customer of SE

I would expect... you to make more use of what they know about existing companies

So that... (what was the users thinking here?) **so that I don't need to keep entering my information again and again for different applications**

As a... customer trying to raise funding

I need... help from quality advisors when it comes to raising funding

So that... I understand the complexity involved

As a... customer potentially looking for funding

I expect... you to understand that I need to do all of my thinking first before I start my journey of raising funding
not the other way round

So that... I can access a grant at the right time

As a...customer applying for a grant

I need... to be able to access a grant in a less complex manner

So that... I fully understand the process I go through and what it means for me

User needs

As a... customer of SE

I need... you to tell me when my advisor changes

So that... I know whether my project is progressing

As a... customer of SE

I need... to understand why I cannot apply for 2 forms of funding at once

So that... I have a clearer idea what's expected of me and of SE

As a... Customer of SE

I want... to be able to easily click through the information

So that... I don't get bogged down with business speak/jargon

As a...customer of SE

I need... straight forward graphics

So that... can easily process the information you provide

- “2 meetings in 2 years – just make it happen”
- “crack demystifying the service”
- “man if you did all of this (business process) that would be great”
- “forms look for specific numbers on specific projects and I don’t always have all this information”
- FR defined in lots of different ways by advisors and the quality of information could actually inform how successful (or not) the company is – “I would be careful which suppliers I would choose”
- progress bar on application useful
- a/c manager suggests suitable grants not on website
- companies want to grow but don’t know how
- downloads helpful
- Signposting extremely valuable