# Prospect Client Gateway Investmet Form

Business Development & Inward Investment

Sheffield City Region

Client Name:

Assesment by: DATE

## Client Origin

**Origination** — drop down lists
- Indigenous or Inward
- Referral or prospect
- Source

incl. Primary Manu or conract manufac.

**Local Authority** — drop down lists
- Where does it fall

**Infrastructure** — Current & required
- Geography
- Links
- Housing etc.

**Nature of the request** — drop down lists
- Funding
  - Grant
- Support
  - Education
  - Training

**Current address** — Postcode search - Google maps
- Inc HQ address
  - Region/UK/EU etc

**Contacts** — Name/Job/Tel/Email
- Named contacts
- Roles/responsibility
- Details e.g. phone

**Date Stamps** — CRM Calendar stamp
- First contact
  - Date/Time
  - Who took the enquiry

**Information route** — drop down lists
- Access to further information sources.

## Client Information

**Basic Information** — drop down lists
- Size £
- Start Up
- Scale Up

**Human Capital** — drop down lists
- FTE No/ Projected/Mix
- R&D IP Dev
- R&D Acquisition IP
- Develop Resource /Skills

**Working Capital** — drop down lists
- Cash Flow
- Stock
- Receivables

**Capital Equipment** — drop down lists
- Bespoke Equipment
- Std. Equipment

**Facility** — drop down lists
- Equity and Estates Property & Footprint
- Additional infrastructure
- Capex required

Initial contact note — Date:

- take forward to ream selction
- more information required/ timing issues follow up
- non starter - and rationale

## Industry Segmentation/cluster *

| | | | |
|---|---|---|---|
| Segment | drop down lists | Value Chain | drop down lists |
| Sub Segment | drop down lists | Supply chain | drop down lists |
| Other | Free field | | |

## Client Case Review *(to be carried out by a team once section 1 is complete)*

**Purpose or motivation of the request?**
- Is it a backfoot action driven by low profit or declining turnovers?
- Is it defensive as market share is eroded by cheaper more agile competitors?
- Is it an infrastructure (fixed costs) too heavy for the market value of the product, and the latest technology offerings?
- Is it a channel management or logistics issue?
- Is it a true honest ambition to reinvent the business for the future or just add to it?

Comments

**Review of the Business Need**
- Is the business long term sustainable in current model/form?
- What is there own investment strategy, business plan, if any?
- What are the targets for growth and profit levels.?

Is it in line with SEP objectives?

Comments

**Team Decision & Rationale**

Comment

Green = proceed to add to Pipe Priority List and begin Project brief — APPROVAL DATE

Orange = FOLLOW UP more info needed, or not yet as its not high Priority - Need time to revisit when more funds available — FOLLOW UP DATE & Resp

Red = Not really our project - no project (could be to pass onto to someone else — REJECT/PASS DATE

| | | | |
|---|---|---|---|
| Name of reviewers | | PRIORITY LIST | 1 2 3 LOC S - R - B - D |
| Date of review | | Pipeline approved | |

## Project Framework:

| | resp. | team |
|---|---|---|
| Business Advice | | |
| Education | | |
| Property sourcing | | |
| Financial | | |
| Project Brief | | |

- Training or skills bank
- Adult Education
- Apprentice program
- Strategic Anchor tenant or technology
- Grant
- Loan

| | | |
|---|---|---|
| Assigned Client Lead from SCR | | |
| Other Team members | | |
| Other Team members | | |

| Informed | Date | Team resp |
|---|---|---|
| Council | | |
| Growth Board | | |
| MCA | | |

| Key Dates: | Date | Team resp |
|---|---|---|
| Project Brief | | |
| Strategic Business case | | |
| Business Case | | |
| Assurance | | |

| Next Actions: | Date | Team member resp |
|---|---|---|
| 1 | | |
| 2 | | |

| INDUSTRY | TECHNOLOGY | VALUE DEVELOPMENT |
|---|---|---|
| High End Engineering | Aerospace | Frame<br>Engine |
| | Machining | Exotics<br>Semi finished components |
| | Materials Technology | Additive<br>Composites |
| | Castings Technology | Titanium |
| | Ordinance | MOD Infrastructure<br>Atomic/Nuclear |
| Sustainability | Recycling | |
| | Sustainable Transport | |
| | Green Technologies | Sustainable<br>Infrastructure |

| INDUSTRY | TECHNOLOGY | VALUE DEVELOPMENT |
|---|---|---|
| Health | Medical Sciences | Equipment<br>Geno Science Development |
| | Child Health Devlopment | |
| | Wellbeing | |
| Digital | Industrialisation | Industry 4.0 tech |
| | Software Development | |
| | Digital Infrastructure development | |
| Energy | Hydrogen fuel | |
| | Battery Technology | |
| | Nuclear | Fusion Technology<br>Nuclear infrastructure |