



HM Government

# Help to Grow: Digital

Providing one-to-one advice for SMEs –  
application guidance

**HELP TO GROW.**  
**DIGITAL**



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# Application and onboarding timeline

## **25 July 2022**

Applications open

## **2 September 2022**

Applications close

## **3 October 2022**

Pilot providers notified of results

## **October and November 2022**

Pilot platforms onboarded onto scheme

## **Late 2022**

One-to-one advice service pilot launched to SMEs

# Eligibility

## Organisation eligibility

Eligible organisations must be one of the following:

- a company registered with Companies House or the FCA Public Mutuals Register
- a charity registered with the Charity Commission, the Charity Commission for Northern Ireland or the Scottish Charity Regulator
- a UK public body

You will also need to:

- have been actively operating for at least 1 year
- have a minimum of 10 advisors that offer advice on all stages of digital technology adoption (pre- and post-implementation)
- provide a platform that SMEs can freely access from the Help to Grow: Digital online platform
- demonstrate [cyber security measures](#) are in place (if online)
- be GDPR compliant

Organisations will be required to undergo fraud and eligibility checks consistent with the Heads of Terms of the scheme. This will include credit checks to ensure financial viability and sanctions screening. The partner (or parent, subsidiary or individuals who have majority ownership of or controls over the company) must not be listed on the UK Sanctions list, in accordance with the Sanctions and Anti-Money Laundering Act 2018.

Successful organisations will be subject to fraud and eligibility checks on a regular basis, at least every 12 months.

## Number of organisations in the pilot

To deliver a manageable pilot, BEIS reserves the right to limit the number of partners it selects to meet the aims of the pilot to build evidence on ‘what works, and why’ across a range of SME sizes and industries.

Applicants will be assessed first on whether they meet the core criteria and may then be scored against the responses to the additional questions to select the most suitable candidates. BEIS may choose not to assess applicants against the additional questions.

BEIS reserves the right not to accept any application or applicant if it deems (in its absolute discretion) that the applicant:

- does not meet the core criteria
- is unsuitable following an assessment of the responses to the additional questions
- is unsuitable following any other checks BEIS may carry out on applicants

## Platform requirements

To run the pilot, SMEs will be signposted to the delivery partner's offer to access one-to-one advice to support technology adoption.

We therefore require that platforms:

- provide a service that SMEs can connect to from the Help to Grow: Digital online platform
- that the service enables SMEs to access quality one-to-one advice services that support successful technology adoption.
- there should be no charge to the SMEs in accessing the platform.
- information to support SMEs understand the skills, knowledge and quality of the service offered should be available for example, list of skills, services, customer reviews and ratings.
- advisor pricing ranges, and customer ratings and reviews where these have been left, should be transparent and readily visible to SMEs prior to engagement of a paid for service.
- provide an up to date, working link to their one-to-one business advice to be signposted to from the Help to Grow: Digital platform for the purpose of the pilot study (If online)
- make it easy for SMEs to identify and connect with advisors that are eligible for the Help to Grow: Digital scheme

## Advisor capacity

To run the pilots effectively we need to ensure that many SMEs can engage, find and receive high quality advice targeted at helping them identify and adopt productivity-boosting technology. We therefore require advice platforms to confirm, with evidence, that they meet our minimum capacity requirements at the time of application. For the purpose of the one-to-one advice pilots, advice provided should focus on digital technology adoption.

Successful applicants should therefore be able to demonstrate the digital advice capacity of:

- a minimum of 10 active advisors capable of giving expert advice relating to digital technology adoption
- cover all stages of digital technology adoption (pre- and post-implementation advice)
- capable of regularly providing expert advice throughout the duration of the scheme

By applying to partner with us for this pilot, organisations commit to ensure that the one-to-one business advice service is available continuously throughout the term of the pilot and take steps to address any technical issues that prevent users of the platform accessing the service in a timely manner.

## Advisor quality

Advisors who connect with SMEs through your platform should provide impartial, high quality, actionable advice to help them make informed decisions and purchase and adopt productivity-boosting digital technology. The interactions should not place any obligation or pressure on the SME to pay for further services or products from the Advisors.

Advisors should have expertise in digital technology adoption, including knowledge of the benefits and operation of software, range of products available, how to implement new software, and be able to tailor advice to meet the needs of SMEs from a range of sectors and sizes. This advice needs to be impartial.

Advisors across the platform should cover both pre-implementation (for example, determining the right software) and post-purchase digital technology advice.

Advice should be available as needed by SMEs on an ad hoc basis, be specific to the question or issue the SME is facing and not exceed 12 months in total duration.

Organisations should have adequate measures in place to assess and review advisor performance on their platform, including an established complaints procedure.

Advice services/advisors who charge a fee to SMEs must provide a free, no obligation advice session to allow SMEs to determine whether an advisor meets their needs and decide whether to proceed with their service or speak to another advisor.

## Data gathering and sharing

To assess and understand how SMEs interact with one-to-one advice services as well as the longer-term impact of one-to-one advice and the introduction of a financial discount, the pilot will require the capture and evaluation of a range of data. It is crucial therefore that any successful organisation should be able and willing to collect and share with BEIS and our evaluation partner, data including but not limited to:

### **Data on outputs of advice delivered:**

- Number of SMEs applying for advice services
- Hours and sessions of advice delivered for each individual SME
- General type of advice asked for (pre-implementation, post-implementation)
- Product category asked for (for example, E-commerce, accounting, CRM)

### **Data on web traffic from Help to Grow: Digital, such as:**

- Tracking the number of SMEs accessing the site from Help to Grow: Digital
- Time taken from registration to service provision
- Unique identifiers should be collected from all SMEs & shared with BEIS/and or our evaluation partner

**Gathering and reporting of outcomes and satisfaction responses, for example:**

- Share feedback collected from SMEs & advisors with BEIS and/or our evaluation partner
- Delivery of additional feedback surveys as requested by BEIS and/or our evaluation partner
- Collect SME & advisor emails for future research engagement for example, interviews
- Provide contact details of SMEs & advisors (where permission is given) to BEIS/and or our evaluation partner
- Data on any change in number or type of advisors on the platform

Data gathered through the pilot remains the property of BEIS and should not be shared more widely without written permission.

We will also require advisors on the platform be able to provide the above information.

## Cyber security considerations

You must provide documentation showing cyber security awareness and demonstrating that standards (such as Cyber Essentials) are being met if your service is online. For example, copies or links to an internal cyber policy or commitment.



# How to apply

## 1. Agree to the heads of terms

At the beginning of the application form, you will be asked to agree to the Heads of Terms for being an eligible one-to one provider platform in the scheme.

Successful organisations must be willing to sign terms and conditions with BEIS, agreeing to the delivery specification and reputation clause. Please refer to [heads of terms](#) for an indication of the terms of agreement. Full terms and conditions will form part of the onboarding process for successful applicants.

You will need to be authorised to agree to the terms and conditions on behalf of your company. These terms and conditions will be legally binding throughout your time participating on the scheme, so you should ensure you have reviewed this document in detail and are able to comply in full.

Providers with complex corporate structures should ensure that they have considered how the signatory organisation (that must meet eligibility criteria) comply with the terms and conditions. We may ask providers in these scenarios to provide additional assurance.

Providers should note that by submitting the application form they are accepting how we will use and process the data provided, as outlined in the [privacy notice](#). The privacy notice gives permission for their information to be shared with other government departments if necessary and our monitoring and evaluation partner.

## 2. Complete the application form

You need to complete an [application form](#) clearly setting out how you meet the criteria and providing appropriate supporting evidence.

If you need an accessible version of the application form you can email: [advisors.helptogrow@beis.gov.uk](mailto:advisors.helptogrow@beis.gov.uk).

If you need any help preparing for, or submitting your self-assessment or application form, you can contact us at: [advisors.helptogrow@beis.gov.uk](mailto:advisors.helptogrow@beis.gov.uk).

Further information about what to expect in each section of the application can be found below.

### Section 1: Core Eligibility Criteria

Section 1 asks questions about the one-to-one advice providers company itself, such as whether it is registered in the UK and has been trading for at least 12 months.

This section asks for essential information about your company, including details that can be checked against records held by Companies House and others, and to facilitate anti-fraud checks. It is essential that your application responds 'yes' to all the statements as part of the minimum eligibility requirements for being a one-to-one advice provider on the scheme.

If for whatever reason you believe that you are eligible despite answering 'no' to one of these questions, please email us at [advisors.helptogrow@beis.gov.uk](mailto:advisors.helptogrow@beis.gov.uk).

## Section 2: Supplementary scored details

This section asks for essential information about your company, including details that can be checked against records held by Companies House and others, and to facilitate anti-fraud checks.

This section asks for information about your organisation, including a description of any criteria you have for your advisors, and how you register and vet your advisors. This section may be scored to determine your suitability.

A maximum of 150 words can be used to detail how you meet each criteria.

## Section 3: Additional information

This section asks for information about your organisation, including geographical scope provided by your organisation. This is for information purposes and will not be assessed.

## Section 4: Applicant and representative details

This section asks for your organisation's details and the contact details of the primary (and if needed, secondary) points of contact going forward. Please be aware that we will only correspond with individuals named in this form, or explicitly authorised via future correspondence with the original named point(s) of contact.

This section also contains confirmation including the applicant has read and understood the Heads of Terms and privacy notice.

## Section 5: Declaration and submit application

Once completed, you should email the form to: [advisors.helptogrow@beis.gov.uk](mailto:advisors.helptogrow@beis.gov.uk) using the subject line: APPLICATION [Company Name]. If you're submitting additional evidence to support your application, please label this clearly.

The deadline for applications is **11:59pm on Friday 2 September 2022**.

## After you've applied

After submitting your application, you will get an automatic confirmation that your application has been received.

You will later receive a follow up email which will include a unique reference number for your application. You will need to quote this in any follow up communication to help us to process your query.

Your application will be reviewed, alongside checks to confirm the validity of the details provided, and any history of fraud associated with your organisation. This includes carrying out credit checks and sanction screening.

Providers will be notified about the outcome of their application by **3 October 2022**.

For those applications which are unsuccessful there are routes available to appeal or make a complaint.

## If your application is unsuccessful

For those applications which are unsuccessful there are routes available to:

- lodge an appeal
- make a complaint

## Make an appeal or complaint

If you're informed your application is unsuccessful you have the right to appeal the outcome within 10 working days of the receipt of your application outcome.

You also have the right to make a complaint at any stage of the application process, or during the operation of the scheme for successful applicants.

For more information on how to make an appeal or complaint, email us at <mailto:advisors.helptogrow@beis.gov.uk>.

## Help and guidance

You can find more information in the following documents:

- [application form](#)
- [heads of terms](#)

If you cannot find the answer to your questions in this document or the others linked above, please email us at [advisors.helptogrow@beis.gov.uk](mailto:advisors.helptogrow@beis.gov.uk) and we will respond to your query as soon as possible.

## Annex: Criteria for advice platforms and advisors

Organisations applying to participate in the one-to-one advice pilot must be able to connect and facilitate access to suitable digital technology adoption advisors which is scalable to meet the demand of this pilot. As such, we will welcome all applications but will only proceed with those who meet the following criteria:

### Core criteria

Ref	Criteria:
1.	Registered in the UK on Companies House, the Financial Conduct Authority Public Mutuals Register, registered as a public body or a Registered Charity as per the Charity Commission, The Charity Commission for Northern Ireland or Scottish Charity Regulator.
2.	Trading for over 1 year at point of application.
3.	<p>An existing service of one-to-one Advisors capable of providing expert advice on digital technology adoption.</p> <p>To be in scope of the scheme, advice given to SMEs arriving from the HtG platform must be relevant to digital technology adoption.</p> <p>This advice needs to be impartial and provided by experts who are independent from any product vendors.</p>
4.	<p>At the time of application, a minimum of 10 advisors registered who are capable of regularly providing expert advice on digital technology adoption, throughout the duration of the scheme.</p> <p>(Should we receive a number of eligible applications, the capacity requirement could be raised to minimise onboarding resource ahead of launch deadline and prioritise provision of sufficient supply to meet SME demand.)</p>
5.	<p>Offer a service where SMEs can choose a suitable advisor or be connected to an advisor based on needs.</p> <p>Please note the buying journey of the advice can be offline and off platform.</p>
6.	<p>Make changes to your offer to clearly denote which advisors are digital technology adoption experts and those that will accept HtG: D grant funding. For example, this may be a bespoke landing page for SMEs arriving from the HtG platform to your site, or a HtG: D tag on advisor's profiles. This should be done prior to formal launch of the scheme (targeting before the end of 2022).</p>
7.	<p>For each of your advisors a brief biography or details of their areas of expertise is available for SMEs to view on the platform.</p>

Ref	Criteria:
8.	Provide quality assurance through internal administration functions, including quality assurance and data capture mechanism
9.	Have an established complaints procedure for SMEs and advisors.
10.	Demonstrate Cyber Security measures are in place by completing Cyber Essentials Certification before launch of the scheme.
11.	Comply with UK GDPR legislation.  Put into place appropriate data sharing agreements and privacy notices ahead of launch.
12.	Provide contact details of SMEs and advisors where permission is given and taking actions as part of evaluation. For example, surveys.
13.	Collect and share data on SME journey through your site. (See indicative data capture fields set out in Advert).
14.	Agree for sanctions screening, credit and fraud checks to be undertaken to determine eligibility.  BEIS reserves the right not to proceed with an application if fraud screening presents a risk.
15.	Work with BEIS and appointed evaluation partners to share data throughout lifetime of the pilot.
16.	No charges (paywall) for SMEs to access the offer and view available advisors.

## Core criteria for paid advice platforms

Ref	Criteria:
17.	SMEs must be able to have a no obligation trial/discovery call with their advisor prior to contracting for services.
18.	Platform offers functionality to see publicly available reviews and/or ratings of advisors, where these have been left.

## Additional information gathered through application

This information may also be assessed by BEIS, using its professional judgement and discretion, for the purposes of narrowing down the number of successful applicants and selecting the most suitable organisations to run a manageable and comprehensive pilot. Each criterion will be scored out of 10 based on the information provided and its suitability to the pilot, assessed by a panel within BEIS.

*Criteria 23 only needs to be completed by organisations whose advisors charge a fee for their advice.*

Ref	Criteria:
19.	Effective vetting criteria for advisors
20.	Effective internal administration functions, (including recruitment of advisors, quality assurance and data capture mechanisms)
21.	Effective monitoring and evaluation process (customer satisfaction, advice request types, frequency etc.)
22.	Number of advisors available through the service
23.	Transparent pricing ranges available to SMEs (where advice is charged for)

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