

TEST2

Testing

Feb 16th & 18st 2021

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What we tested

**We tested the latest wireframe prototype
of: applying for Green Jobs Funding**

<https://4jd442.axshare.com>

Green jobs

Before you complete the application, you'll need to answer some eligibility questions to make sure you're eligible for this funding. If you're eligible, you'll need to read some important information and then create an account to complete the rest of the application.

This application must be completed by an executive director of your company.

Already started an application for this fund? [Sign in to continue your application](#)

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Who we tested with

- **We tested:**
 - **6 potential customers**
 - **SME's**
 - **Using Video calls (Microsoft Teams)**

Results Summary


- **De Minimis is still an unhelpful term**
- **De Minimis is not mentioned in the eligibility section, even though it is an “absolute requirement”**
- **Customers needs to be told in advance, what information documents & evidence will be “needed to successfully complete the application”, to avoid unpleasant surprises**
- **Private documents make people nervous about security and liability**
- **Business Plan’s are referenced confusingly (Repeatedly and with/without a template).**

Starting the application

- Makes sense
- Clean and Clear

BUT

- COMPLETED was not understood as SAVED
- De-Minimis should be earlier as it is a potential show stopper. Should it be in Eligibility.
- And nobody knows what De-Minimis is

[Sign in](#)

Green jobs

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Eligibility

- Nice and Clear
- Questions make sense

BUT

- The term **Tax Haven** surprised one Finance Director, who said he *“would not expect to see such an emotive term on a Government Website”*. It made him suspect the site.
- De-Minimis is not mentioned here

Check your eligibility

To get started, we need to ask a few questions to check if you're eligible for this fund. If you're not eligible, we'll tell you straight away.

[< Go back](#)

Does your business have a trading address in Scotland?

Your trading address is the address where you do business. It's the address your customers and suppliers will usually use. If you have more than one trading address, you can select 'yes' as long as at least one of them is in Scotland.

- ☐ Yes
- ☐ No
- ☐ No, but we intend to set up a trading location in Scotland in the future

Will this funding support a project that's taking place in Scotland and will have an impact in Scotland?

- ☐ Yes ☐ No


What size is your business?

The explanation for each answer uses euros instead of pounds because we've used the European Commission definitions

- ☐ Micro - less than 10 employees, less than €2 million turnover or less than €2 million balance sheet
- ☐ Small - less than 50 employees, less than €10 million turnover or less than €10 million balance sheet

Before you apply

- Some customers wanted the linked “*Full application Guidance*”, to be part of the page content

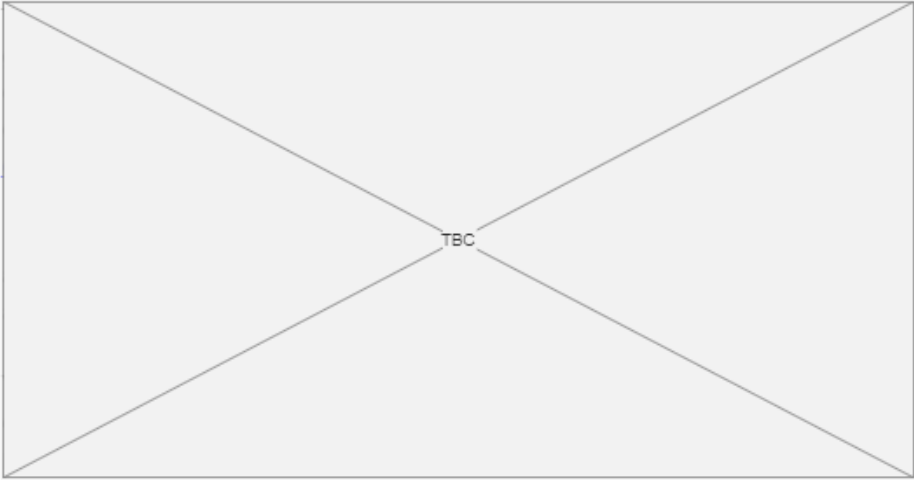
Sign i

Important information before you apply

Before you apply for this fund, make sure you've read the [full application guidance](#).

[< Go back](#)

About the funding you're applying for

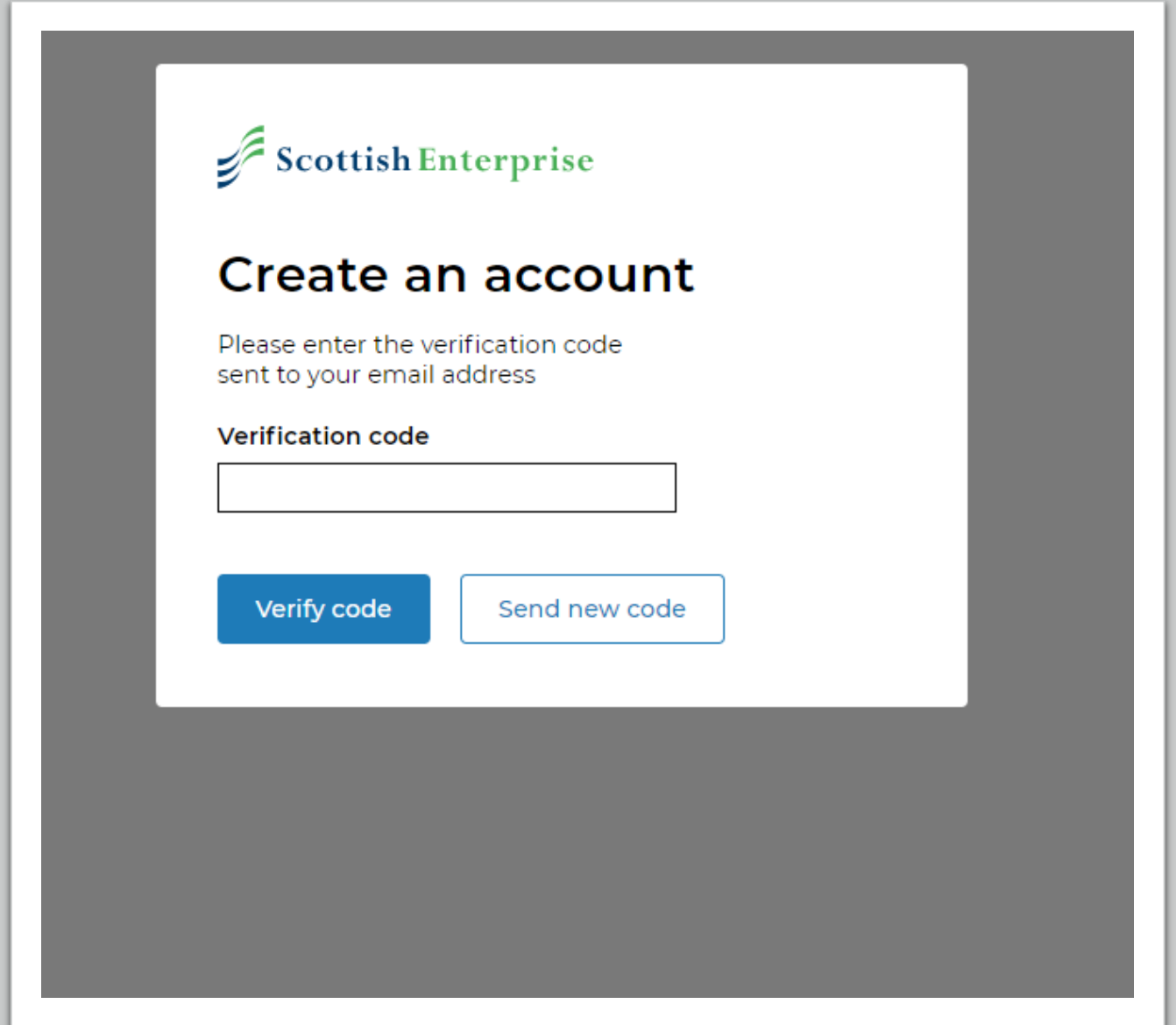


TBC


..

Create an Account

- Fairly low friction 😊
- Some people would expect this code via Mobile Phone



The screenshot shows a web form for creating an account with Scottish Enterprise. The form is white and centered on a dark gray background. At the top left of the form is the Scottish Enterprise logo, which consists of a green stylized wave icon followed by the text 'Scottish Enterprise' in blue and green. Below the logo is the heading 'Create an account' in bold black text. Underneath the heading is a message: 'Please enter the verification code sent to your email address'. This is followed by the label 'Verification code' and a single-line text input field. At the bottom of the form are two buttons: a solid blue button labeled 'Verify code' and a white button with a blue border labeled 'Send new code'.

 Scottish Enterprise

Create an account

Please enter the verification code sent to your email address

Verification code

[Verify code](#) [Send new code](#)

Personal Details

- “Scanned passport & driving license” were understood and supported as Personal Photo ID
- Driving License was the more popular choice.

BUT

- People expressed concerns of data privacy/security
- They were also concerned about any perceived Personal Liability that using Personal Documents suggests

The screenshot shows a web form titled "Personal details" for Scottish Enterprise. At the top right is a "Sign out" button. Below the title, a note states: "We'll store most of this information in your account so you don't need to provide it again if you apply for another fund or service in the future. This information will also help us verify your identity." A "< Go back" link is on the left. The form contains several input fields: "Email address" (pre-filled with "ltd@gmail.co.uk"), "First name", "Last name", and "Contact number". Below these is a section "Your position in the business" with a note "If more than one option applies, select the most relevant." and five radio button options: "Owner or sole trader", "Director", "Partner", "Company secretary", and "Trustee", plus an "Other authorised representative" option. Next is "Which of the following identification documents can you provide?" with three radio button options: "A scanned image of my passport", "A scanned image of my driving license", and "Neither of the above". At the bottom, there is a checkbox for "I certify that the personal details I've given are accurate to the best of my knowledge. I also confirm that either:" followed by two bullet points: "I am a Director, Authorised Signatory, Company Secretary, Trustee or other appointed officer of the organisation that I'm creating an account on behalf of" and "I am a sole trader or am authorised by the sole trader to create an account on their behalf". A blue "Confirm" button is at the bottom right. The footer contains links for "Contact us", "Privacy notice", "Cookie policy", "Accessibility", and a note "BETA: This is a new service".

Scottish Enterprise Sign out

Personal details

We'll store most of this information in your account so you don't need to provide it again if you apply for another fund or service in the future. This information will also help us verify your identity.

< Go back

Email address
ltd@gmail.co.uk

First name
[input field]

Last name
[input field]

Contact number
[input field]

Your position in the business
If more than one option applies, select the most relevant.

☐ Owner or sole trader

☐ Director

☐ Partner

☐ Company secretary

☐ Trustee

☐ Other authorised representative

Which of the following identification documents can you provide?
This will help us confirm your identity. To see how we'll store and protect this personal data, you can read our privacy notice.

☐ A scanned image of my passport

☐ A scanned image of my driving license

☐ Neither of the above

☐ I certify that the personal details I've given are accurate to the best of my knowledge. I also confirm that either:


- I am a Director, Authorised Signatory, Company Secretary, Trustee or other appointed officer of the organisation that I'm creating an account on behalf of
- I am a sole trader or am authorised by the sole trader to create an account on their behalf

Confirm

Contact us Privacy notice Cookie policy Accessibility BETA: This is a new service

Business Details

- It would be handy to know that having SIC code would be helpful (Evidence Requirements)
 - 1000 Word limit on Text Box's also suggests that you have to write "A Lot"
-

Sign out

Business details

In this section, you'll need to provide some information about your company. If your company is part of a group, remember that you'll need to provide the information for your parent company.

[< Go back](#)

Is your business registered at Companies House?

☐ Yes ☐ No

Which sector is your business in?

Please select ▼

What is your SIC code? (Optional)

This stands for 'standard industrial classification of economic activities'. It will be listed on Companies House as your 'nature of business'. If you don't know your SIC code, you can skip this question.

What is the nature of your business activity?

Your sector or SIC code don't always explain what your company does. Provide a couple of words to clarify what your business does or what products or services you provide.

1000 words

How many full time equivalent (FTE) employees does your business have?

Only include current, permanent employees. Full time is over 30 hours a week. Two employees working 15 hours a week would make one FTE employee. Zero hour contracts don't count towards FTE employees.

About your Project

- “Project Cost” was viewed as a vague term
- Users were surprised that they needed to provide a business/project plan at short notice (Evidence Requirements)
- 1000 words...

How long do you expect your project to last?

- ☐ 0-3 months
- ☐ 3-6 months
- ☐ 6-9 months
- ☐ 9-12 months
- ☐ Over 12 months

What do you expect your total project cost to be?

£

Upload a project plan or business plan

Provide a more detailed description of your project. This could be a specific project plan, or your business plan if it includes information about this project.

[Upload a project plan or business plan](#)


Have you applied for funding from any other sources for this project?

- ☐ Yes ☐ No

Confirm

De Minimis

- Nobody knows what this is
- It is not mentioned in the Eligibility Requirements (i.e. don't proceed if you are at your limit)
- The descriptive text is not in user friendly language
- The term itself might not be the best way into this section (Have you reached your State Aid Limits...)

[Sign c](#)

Public sector funding - de minimis

Some public funding comes in the form of de minimis aid. This is an EU state aid mechanism designed for small amounts of funding. If you've ever received de minimis aid as part of public sector funding, you will have been told in writing at the time. We need to ask you about any previous de minimis aid you've received to make sure this grant wouldn't exceed your de minimis allowance.

[Read the full de minimis guidance](#)

[< Go back](#)

Has your business received any de minimis aid from a UK source during your business's current financial year or the previous two financial years?


☐ Yes ☐ No

[Confirm](#)

[Contact us](#) [Privacy notice](#) [Cookie policy](#) [Accessibility](#) [BETA: This is a new service](#)

Evidence

- Security concerns were expressed around this sensitive information. “If I am not a Public Company then I don’t might not want my information to be Public”.
- Lots of Evidence that I could have been warned about before starting.
- I already uploaded a Business Plan and “NOW” you are giving me a template? Confusing.

Sign out

Application evidence


In this section you'll need to upload a number of documents to help us assess your application.

[< Go back](#)

Please upload the following documents to support your application. You can upload more than one document if you need to.

When is your company's financial year end?

This will help us check the documents you provide are up to date for your business.



Annual accounts

If your company is less than 3 years old, provide whatever accounts you can.

[Upload annual accounts](#)

Management accounts

These must contain profit and loss details, balance sheet and cashflow, along with a brief performance summary.

[Upload management accounts](#)

Financial forecasts

This should include profit & loss, balance sheet, cashflow and salary details for your directors. These should be as detailed as possible for at least the first 12 months. You can upload more than one document if you need to.

[Upload financial forecasts](#)

Business plan


This is a key part of the application so it's important your business plan contains everything it needs to. If you need more information about what to include, see [our business plan template](#).

[Upload business plan](#)

Confirm

Declarations

- People like TickBox's

[sign out](#)

Declarations

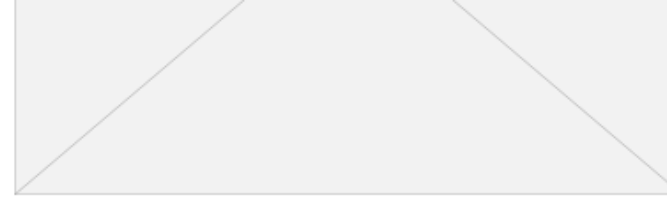
[< Go back](#)

Please confirm whether you agree to the following disclaimers before submitting your application

- ☐ I understand that any payment received must be declared to HMRC as appropriate as part of the tax return of the business.
- ☐ My organisation (at group level) is not subject to an outstanding recovery order following a previous European Commission decision declaring an aid illegal and incompatible with the internal markets, (this excludes aid schemes to make good the damage caused by natural disasters).
- ☐ Any European Commission rescue aid my company has received (anywhere in the EU) has been reimbursed in full or the guarantee has been terminated. Any restructuring aid we've received has been provided with a restructuring plan.
- ☐ I understand that any funding is subject to Scottish Enterprise's approval and the company's acceptance of the terms and conditions of any offer of support Scottish Enterprise may make.
- ☐ I certify that the information given on this form is accurate to the best of my knowledge.
- ☐ I confirm that either:
 - I am a Director, Authorised Signatory, Company Secretary, Trustee or other appointed officer of the organisation that I'm submitting this application on behalf of
 - I am a sole trader or am authorised by the sole trader to submit this application on their behalf
- ☐ I understand that Scottish Enterprise may require evidence of the signing authority of any individual.
- ☐ I confirm that my business (or any businesses in my group) is not connected to a tax haven, as set out in [Schedule 4 Part 12 of the Coronavirus \(Scotland\) \(No 2\) Act 2020](#). For more information, see the [European Commission guidance on tax havens](#).

Review

- People asked for the option to download the summary BEFORE Submitting.
- “What if I want **Email AND Phone**”



By submitting this application, the applicant acknowledges that the information provided in this application may comprise company information and personal data (as defined in the General Data Protection Regulation (EU) 2016/679 and the Data Protection Act 2018 ("Data Protection Law"). Any personal data provided in the application will be processed by SE in accordance with Data Protection Laws and held in accordance with Scottish Enterprise's privacy notice. Individuals can find information on their rights in respect of the personal data we hold by also visiting our privacy notice.

The information provided in this application may be shared and used by Scottish Enterprise, The Scottish Government, Highlands and Islands Enterprise and other associated bodies such as local delivery organisations, consultants and agents collectively referred to as 'the Agencies', to assess its suitability for support. If the application is successful, the Agencies will use the information provided in this application for administration and management purposes, including carrying out appropriate checks and audits. Some information may also be passed to auditors, the European Commission or its agents for administrative purposes.

By submitting this application, the applicant confirms that it is the data controller of personal data contained in this application and that this personal data can be processed by Scottish Enterprise for the purposes outlined above. The applicant, if successful will also be the data controller for the personal data provided as evidence.

☐ I have read the above statement and agree to the [privacy notice](#)

If we need to contact you to discuss your application further, how would you prefer to be contacted?

☐ By email

☐ By phone

[Submit application](#)

[Download application summary](#) ↓

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