**Guidance Notes**

This form has been designed to capture information throughout the Business Development cycle, from initial telesales/lead through to sign up.

The Telesales/Lead Generator section can be completed by any BD staff who deals with an enquiry or generates new business. It provides important data capture for the business details and leads onto an appointment with a Business Development Adviser. If the Business Development Adviser is completing this section they will still need to complete this section, however if the employer is available they can skip the appointment booking and move straight onto the Business Development Adviser section.

The Business Development Adviser section has been developed to incorporate elements of a TNA (Training Needs Analysis) alongside other elements of data capture. At this stage we need to share the ‘Employer Commitments’ and ‘Health and Safety Checklist’ documents with the employer, both of which need signing prior to moving to the recruitment and sign up stage.

The Vacancy Details section can be completed with the employer, or if the employer prefers we can send the individual Vacancy Template document. If this happens please ensure returned form is added to this document for future reference.

Once the New Start section is completed this will need to be sent to Jon Price who will then record and pass on to the relevant curriculum area.

|  |  |
| --- | --- |
| **Telesales/Lead Generator** |  |
| Registered Employer Name |  |
| Is the company limited? If please acquire companies house number.  [Find and update company information - GOV.UK (company-information.service.gov.uk)](https://find-and-update.company-information.service.gov.uk/?_ga=2.197452399.1346208580.1642092365-1307696945.1611304922) |  |
| Workplace Address:  ***(Please include registered address is different to workplace address)*** |  |
| Contact Details  Name, job title, contact number, email. |  |
| Company Size |  |
| Does the employer pay the apprentice levy? |  |
| Is this company logged on ProEngage? If no please request to be added |  |
| Notes  Will this be a vacancy?  Has the employer got an individual they’d like to enrol?  Are they interested in Industry/Work placements and T Levels? |  |
| Appointment Details |  |
|  |  |
| **Business Development Adviser** |  |
| Company info and background. |  |
| What are the company’s goals and objectives? |  |
| Are there any threats to the future success of the business? i.e. Recruitment issues, skill gaps, funding, market changes. |  |
| Is the employer aware of the apprenticeship minimum wage? Will the apprentice be paid this?  £4.30 per hour minimum (£4.81 from 1st April 2022)  If the apprentice is aged 19+ at the start of the apprenticeship they can be paid the apprentice minimum wage for the 1st year. After this they require National Minimum Wage for their age group.  This also applies to apprentice who turn 19 and have completed 1 year on the apprenticeship. |  |
| Is the employer aware of the £1000 incentive?  If the apprentice is aged 16-18 when they sign up the employer receives £500 after 4-5 months, then another £500 after 14-15 months. This is paid via our finance team.  \*We can still discuss the £3,000 grant however this ends 31st January 2022. Apprentices must be employed by this date for the employer to qualify\* |  |
| Does the employer have a DAS account?  If Yes, does the employer know how to send us a cohort? (Ideally the employer will give us permission via their DAS account to add their learners)  If No, please discuss further and provide guidance for the employer to create a DAS account. |  |
| Employer Contributions  Please discuss 5% contributions where required (Apprentices aged 19 or above/Employers with over 50 staff) | N/A for levy payers. |
| Has the **‘Employer Commitments’** Document been shared with the employer?  If the employer is happy with list of commitments please request they send a signed copy back by email, or with a wet signature during your visit. |  |
| **Health and Safety Checklist**  If the employer is an existing customer please check to see when their current H&S assessment expires.  If the employer is New, or is a repeat customer with an expired H&S please complete a H&S checklist and save to the ‘NEW BUSINESS/H&S CHECKLISTS’ folder. | Please provide details below on H&S Checklist Actions. |
| Has the business been added to ProEngage with notes added? |  |
| Next Steps | If the employer would like to recruit an apprentice through our recruitment team, please complete the ‘Vacancy Details’  If the employer has an individual they wish to enrol, please complete ‘Learner Details’ and pass on to the recruitment team to upload on to ProSolution.  If the employer is not looking at the above, or is looking at additional training please add notes below. |

**Name of Recruitment Adviser passed to:**

**……………………………………………………..**

|  |  |  |
| --- | --- | --- |
| **VACANCY DETAILS** | | |
| Vacancy Title |  | |
| Vacancy Short Description (maximum 255 characters) |  | |
| Vacancy Full Description |  | |
| Weekly Wage  (Min £4.30 p/hour £4.81 from 1st April 2022) |  | |
| Working Hours  (Please ensure you indicate the number of hours over how many days per week) |  | |
| Duration (in months) | (Apprenticeship Duration) | |
| **FURTHER DETAILS** | | |
| Qualifications Required/Entry Criteria |  | |
| Skills Required |  | |
| Reality Check (e.g. requires working at heights, outdoors etc.) |  | |
| Personal Qualities |  | |
| Important Additional Information |  | |
| Future Prospects |  | |
| Two questions related to this vacancy that you would like applicants to answer at the application stage |  | |
| **TRAINING DETAILS** | | |
| Apprenticeship Pathway Title | |  |
| Level of Apprenticeship | |  |
| Summary of Training to be provided | |  |
| **TIMESCALES** | | |
| Desired Start Date | |  |
| **STAFF DETAILS** | | |
| Completed By | |  |
| Date Completed | |  |

**NEW LEARNER SIGN UP DETAILS**

|  |  |
| --- | --- |
| **Learner Name** |  |
| **DOB** |  |
| **Address** |  |
| **Contact Number** |  |
| **Email Address** |  |
| **NI Number** |  |
| **English GCSE grade (predicted if not yet achieved)** |  |
| **Maths GCSE grade (predicted if not yet achieved)** |  |
| **Does the learner have any prior learning we need to be aware of?**  *(Previous apprenticeships, college courses, training in the sector they are going to be enrolled to)* |  |
| **Does the learner have any support needs?** |  |
| **Does the leaner have an EHCP Plan?** |  |
| **ULN** |  |
| **KC Student Reference Number** |  |
| **Start Date in Employment**  **(If the learner is already employed by the business, will they be changing job roles? Please provide further detail).** |  |
| **Further Comments** |  |