



Co-financed by



Education & Skills  
Funding Agency



## Enquiry/Organisational Needs Analysis

### Enquiry

Date of Enquiry:

Enquiry taken by:

Business Name:

Trading Name:

Registered Address:

Trading Address:

Postcode:

Postcode:

Parent Company Address (if applicable):

Enquiry Contact

Position

Telephone / Mobile

Email address

Has employer engaged with BMet previously? (Check CRM)

How did employer hear about BMet?

Type of Business

Reason for call- Initial Business Needs (e.g. FCR, App, ELI)

If apprenticeship- Type of apprentice required	
Additional notes	

If apprenticeship- Does employer have own candidate ?  Yes  No

Informed of Health & Safety (Including COVID-19 & ELI)?  Yes  No  
*Inform employer that BMet H&S representative will contact them*

Name of person (s) BMet representative will meet with? <input type="checkbox"/> as above		<i>If this box is ticked, only fill in fields Date/Time of meeting and BDA/BDM assigned</i>	
Enquiry Contact			
Position			
Telephone / Mobile		Email address	
Alternative Enquiry Contact			
Position			
Telephone / Mobile		Email address	
Date/Time of meeting		BDA/BDM assigned	

### Post-Enquiry Checks and Actions:

CRM Update/Create	<input type="checkbox"/>	Companies House (add No.)			
Previous BMet engagement & Learner history		<input type="checkbox"/> Yes	<input type="checkbox"/> No		
Company website		Company Credit Check	<input type="checkbox"/>	Score	
College Finance – Employer history & SINVA <i>Check must be requested before proceeding</i>				<input type="checkbox"/>	
BMet Apprenticeship Framework Agreement		<input type="checkbox"/> Created	<input type="checkbox"/> Issued	<input type="checkbox"/> Signed	<input type="checkbox"/> Returned
DAS Setup <i>inc. funding/incentives</i>					
Current Health & Safety Assessment / ELI / COVID 19?		<input type="checkbox"/> Yes	<input type="checkbox"/> No		
Date email confirmation sent to employer & BDA/BDM					
Documents uploaded to CRM (date)?					

### Checks & Actions carried out by :

Name:		Date completed:	
-------	--	-----------------	--

# Organisational Needs Analysis

Date of ONA			
Date Company Established	Current Turnover	Number of employees	Levy value
Sector	Select Sector		
SIC Code (if known)		Primary business activity	

## Current plans

Do you have a Business Plan?  Yes  No

Do you have a Training Plan?  Yes  No

Do you have a training & development budget?  Yes  No If Yes, when is it reviewed?

If your training plan includes apprentices, how will your training plan meet the 20% off the job training requirements?

What is the budget size?  Does it reflect skills needed to support business growth?  Yes  No

Additional notes

## Ambition and Growth

What are your growth plans for the next 12 months?

What challenges are you anticipating?

## Training and needs

What are your current skills gaps?

How many people need to be trained and over what period?

What training has priority?

What impact will this training have on the business?  
(e.g. cost savings, increased productivity, new markets, product development etc.)

Would you consider Apprenticeships for any of your existing employees and new recruits?

Yes

No

If Yes, in what business areas?

## Future Plans

Do you have any future plans we have not discussed or any additional business needs?  
(E.g. bespoke training, distance learning, recruitment services)

Would you assist in supporting young people through work experience for BMet Students?

Yes

No

## ESF Mandatory questions :

Do you have an Equality & Diversity Policy in place?

Please select

Additional comments:

Would you be interested in knowing more about what support is available for Equality & Diversity in the workplace?

Yes

No

Do you have a current Environmental / Sustainability Policy in place?

Additional comments:

The ESF Business Elevator project has a dedicated Sustainability Officer for SME employers, through our partners Solihull College and University Centre and South & City College Birmingham. Would you be interested in knowing more about what support is available?

Yes

No

If yes, do you consent to your contact details being shared with our ESF Business Elevator partners Solihull College and University Centre and South & City College Birmingham?

Yes

No

## Employer Summary

Please include any relevant funding and incentives information if appropriate

--

ONLY

## Summary of identified opportunities

Continue on a separate sheet if required

Programme	No. of Learners	Level of learning	Learner names	Date reqd to start	Funding stream ESF, AEB, APP, FCR

READ

## Training Needs Analysis Sign Off

BMet Representative		Employer Representative	
Name		Name	
Signature		Signature	
Date		Date	