



**Section B - Employer Funded Training**

**3. During the year, did this business fund any training of its employees?**

Employer funded training of the business's staff, whether provided by an external organisation or its own personnel. For example, training on IT systems, new production equipment, ISO accreditation, skills development, etc.

Yes  → Go to question **4**

No  → Go to question **8** <sup>3</sup>

**4. During the year, what was this business's expenditure on training provided by other organisations?**

Include:

- training provided by external suppliers, whether provided on-site or elsewhere
- levy payments for training organisations, e.g. Sector Skills Council . . . £

, ,  <sup>4</sup>

MRK

NFR

**5. During the year, what was this business's spending on staff training carried out by its own staff?**

Include:

- staff costs of trainers, including development and delivery of training
- travel and subsistence payments
- associated costs, including providing facilities, overheads and materials but not capital items.

Exclude:

- the cost of staff time whilst being trained and therefore absent from work
- on-the-job training
- capital items.

**Note:** Estimates based on proportions of staff time are acceptable . . . . £ , ,  <sup>5</sup>

NFR

**6. On average, how many days training did each member of staff receive during the year?**

**Note:** An estimate is acceptable . . . . .

days <sup>6</sup>

NCF

Years      Months

**7. On average, how long does the business expect to benefit from a typical investment in training? . . . . .**

      <sup>7</sup>

NBD

**Section C - Software**

**8. During the year, did this business purchase or develop any software?**

Purchase of external software and development of software in-house. For example, operating systems, general purpose office applications (e.g. word processing), special purpose applications (e.g. financial accounting systems, databases, production control systems), etc.

Exclude software development conducted as part of R&D and included in Section E.

Yes  → Go to question **9**

No  → Go to question **12** <sup>8</sup>

MRK

**9. During the year, what was this business's expenditure on software bought from other organisations?**

Include:

- off-the-shelf software
- software licenses and license renewals
- generic and bespoke software.

Exclude:

- software embedded in other items of current or capital expenditure, e.g. software pre-installed on IT hardware . . . . .

£    ,    ,     <sup>9</sup>

NFR

**10. During the year, what was this business's spending on software development carried out by its own staff?**

Include:

- staff costs of all staff involved, excluding contractors
- associated costs, including office facilities, overheads and materials but not capital items.

**Note:** Estimates based on proportions of staff time are acceptable . . .

£    ,    ,     <sup>10</sup>

NFR

**11. On average, how long does the business expect to benefit from a typical investment in software? . . . . .**

Years      Months  
         <sup>11</sup>

NBD

**Section D - Reputation and Branding**

**12. During the year, did this business fund any external or internal work intended to enhance reputation or brand values, either of the business as a whole or individual products or service lines?**

For example, product launches, promotional campaigns, 'rebranding' of business, development of promotional materials, etc.

Yes  → Go to question **13**

No  → Go to question **16** <sup>12</sup>

MRK

**13. During the year, what was this business's expenditure on activities undertaken by other organisations to enhance reputation or brand values?**

Include:

- external costs of advertising and marketing campaigns to agencies, media organisations, trade fairs, suppliers of marketing databases, etc . . . . .

£    ,    ,     <sup>13</sup>

NFR

**14. During the year, what was this business's spending on activities carried out by its own staff to enhance reputation or brand values?**

Include:

- staff costs of all staff involved, e.g. product managers, sales and marketing personnel
- associated costs, including office facilities, overheads and materials but not capital items.

**Note:** Estimates based on proportions of staff time are acceptable . . . £ , ,  14

Years Months

**15. On average, how long does the business expect to benefit from a typical investment intended to enhance reputation and branding?**

15

**Section E - Research and Development (R&D)**

**16. During the year, did this business fund any external or internal research and development (R&D) work?**

Original investigation to acquire new knowledge to resolve scientific or technological uncertainty. For example, prototype development and testing, phase 1 to 3 clinical trials, etc.

Yes  → Go to question **17**

No  → Go to question **20** 16

**17. During the year, what was this business's expenditure on R&D undertaken by other organisations?**

Include costs of bought-in R&D services . . . . . £ , ,  17

**18. During the year, what was this businesses' spending on R&D conducted by its own staff?**

Include:

- staff costs of all staff involved
- associated costs, including facilities, overheads and materials but not capital items.

**Note:** Estimates based on proportions of staff time are acceptable . . . £ , ,  18

Years Months

**19. On average, how long does the business expect to benefit from a typical investment in R&D? . . . . .**

19

NFR

NBD

MRK

NFR

NFR

NBD

**Section F - Design**

**20. During the year, did this business fund any external or internal design?**

For example, the design of products or services to improve their look or performance.

Exclude design of scientific prototypes (part of R&D) and design of software.

Yes  → Go to question **21**

No  → Go to question **24** 20

MRK

**21. During the year, what was this business's expenditure on design activities by other organisations?**

Include costs of bought-in design services.

Exclude costs of design embedded in other items of current or capital expenditure

£    ,    ,    21

NFR

**22. During the year, what was this business's spending on design work carried out by its own staff?**

Include:

- staff costs of all staff involved, e.g. graphic designers, product designers, architects, design engineers, etc.
- associated costs, including office facilities, overheads and materials but not capital costs.

**Note:** Estimates based on proportions of staff time are acceptable . . . £    ,    ,    22

NFR

Years      Months

**23. On average, how long does the business expect to benefit from a typical investment in design? . . . . .**       23

NBD

**Section G - Organisation or Business Process Improvement**

**24. During the year, did this business fund any external or internal work on organisation or business process improvement?**

Work on improving the efficiency and effectiveness of the business.

For example, quality improvement programmes, business transformation projects, strategy development and implementation, culture change projects, etc.

Exclude software spending included in Section C.

Yes  → Go to question **25**

No  → Go to question **28** 24

MRK

