

# Halo Experience Portal

## Grant Project Pack

Funding proposal for a Scottish-based software product development programme

Item	Draft position
Applicant / sponsor	HaloNinjas Ltd - legal entity details to confirm before submission
Project lead	Jon Adlum, Co-Founder and Director
Project location	Perthshire / Dundee / Inverness delivery model
Funding route	Scottish Enterprise R&D Grant as primary route; HIE / Innovate UK / Interface as adjacent routes
Project duration	18 months
Indicative project value	£1.025m total project cost
Indicative grant request	£450k target grant contribution, subject to eligibility and intervention rate
Document status	Draft for funder discussion - not a formal application

### Important pre-submission note

The working title uses the Halo name because the product is intended to extend the Halo ecosystem. Halo is a third-party brand. Before external launch or public grant publication, the applicant should confirm brand, partner, and trademark permissions, or use a neutral product name such as Service Experience Hub for Halo.

## Funder-ready one-page summary

Question	Response
The project	Build the Halo Experience Portal: a configurable SaaS experience layer that extends HaloITSM, HaloPSA and related Halo deployments with modern self-service, branded digital journeys, knowledge access, request catalogues, dashboards and secure integrations.
The ask	Seek approximately £450k grant contribution towards a £1.025m, 18-month R&D programme. The exact claimable amount will depend on the grant route, company size, eligible costs and intervention rate.
Why now	Halo adoption is expanding globally and many customers need richer, more tailored end-user experiences than a standard service portal can provide. HaloNinjas has market access, implementation expertise and partner credibility to turn this into a repeatable product rather than a one-off consultancy build.
Why Scotland	Create a high-value software development team in Scotland, with a practical base around Perthshire, Dundee and/or Inverness. The proposal supports digital jobs, product IP, exportable software revenue and collaboration with the Scottish tech ecosystem.
Innovation	The R&D lies in building a secure, multi-tenant, configurable experience platform that abstracts Halo data and workflows into reusable digital journeys, supports customer-specific branding without custom code, and can be deployed repeatably across industries.
Commercial endpoint	A subscription SaaS product sold directly, through HaloNinjas consulting channels, and through selected Halo partner channels. Target: £3.6m annual recurring SaaS revenue by year 5 under the base case.
Public benefit	8 direct FTE by end of project, 15 FTE by year 3 and 25 FTE by year 5 under the base case; increased local supplier spend; graduate and university collaboration opportunities; export-led Scottish software revenue.
Additionality	Without grant support the project would proceed much more slowly, likely as client-funded custom builds. Grant support accelerates productisation, Scottish hiring, technical R&D, pilot deployments and IP creation.

### Suggested funding positioning

#### The strongest grant narrative

Do not position this as a better Halo portal for one customer. Position it as a Scottish-owned software product that creates new IP, solves a repeatable market problem, generates exportable SaaS revenue and creates high-value technology jobs in Scotland.

## 1. Funding route and grant fit

**Primary route: Scottish Enterprise R&D Grant.** The current best fit appears to be the larger Scottish Enterprise R&D Grant route, because the proposed programme is a new product development project with technical risk, commercial prospects, Scottish economic impact and potential to create R&D jobs. Scottish Enterprise currently indicates that these grants support new or significantly improved products, processes or services, with a minimum grant considered of £250k and a focus on projects with meaningful economic transformation impact.

**Secondary routes.** SMART: SCOTLAND remains relevant as a future feasibility route but is currently shown as on hold. The smaller Scottish Enterprise R&D support route can suit a reduced 12-month scope if HaloNinjas is already supported through Scottish Enterprise account management or specialist support. HIE may be relevant if the development activity is materially located in the Highlands and Islands region, such as Inverness, but its digital adoption grant excludes salary costs and is

more suited to capital/adoption costs than a payroll-funded product team. Interface Innovation Vouchers can be used to seed a university collaboration around UX research, AI-assisted knowledge retrieval, accessibility or security assurance.

Funding source	Fit	How to use it
Scottish Enterprise R&D Grant	Best fit for main £1m+ R&D programme	Position as high-impact Scottish product R&D with new IP, technical risk, skilled jobs and global market opportunity. Ensure the project has not started before approval.
Scottish Enterprise smaller R&D support	Possible reduced-scope route	Useful for a 12-month prototype or specific R&D strand if HaloNinjas is eligible through account management / specialist support.
SMART: SCOTLAND	Fallback / future feasibility route	Currently shown as on hold. If reopened, use for a 6-18 month feasibility study with grant capped at £100k.
Highlands and Islands Enterprise	Possible if Inverness/HIE region is chosen	Good for regional economic impact and digital/technology adoption, but not a clean fit for employee salary-funded core product development.
Interface Innovation Voucher	Low-cost university collaboration seed	Use for an academic collaboration with Abertay, Dundee, UHI, Stirling or similar, especially for UX research, accessibility, AI safety or product validation.
Innovate UK competitions	Monitor for specific calls	Use if a live competition matches AI, digital services, productivity, cybersecurity or high-growth innovation. Open calls change frequently.

## 2. Applicant and strategic rationale

**HaloNinjas has an existing commercial position in the Halo ecosystem.** The business understands Halo customer needs, implementation realities, common integration pain points and the commercial routes into Halo-aligned buyers. This gives the project a practical route to market that a generic software start-up would not have.

- Deep domain insight from Halo implementation and service management consulting.
- Direct visibility of repeated customer requirements for portals, service catalogues, knowledge and digital experience design.
- Ability to recruit and lead a focused Scottish development team while using HaloNinjas as the launch channel.
- Potential to create a separate product company or IP-holding structure once grant and commercial requirements are clarified.

**The commercial logic is to move from bespoke services to repeatable product revenue.** Today, customer portal requirements are often solved through configuration, custom build, or one-off integrations. This project turns repeated implementation knowledge into a scalable platform that can be licensed across many customers and sectors.

## 3. Problem statement

**The user experience gap.** Organisations invest heavily in service management platforms, but their end users often experience a generic portal rather than a consumer-grade digital service journey. This creates lower adoption, more agent contact, duplicated requests, inconsistent user journeys and weaker return on service management investment.

- End users need simple, branded journeys for requesting help, finding knowledge, tracking progress and approving work.
- Internal service teams need repeatable cross-functional service portals for IT, HR, facilities, finance, onboarding and customer support.
- MSPs and enterprise customers often need experiences tailored by customer, brand, contract, location, business unit or service line.
- Current approaches often require bespoke development, manual configuration, duplicated content or customer-specific portal work.
- The result is a gap between the power of the service management platform and the quality of the front-end user experience.

### Grant-relevant problem framing

The project is not trying to replace Halo. It creates a configurable experience and integration layer that lets organisations deploy richer digital service journeys faster, with less bespoke development and with a stronger user adoption model.

## 4. Proposed product

**Halo Experience Portal is a modular SaaS product.** It sits above a customer Halo instance and provides a modern, branded, secure experience layer for different user groups. The product is designed to be configurable by non-developers while giving advanced customers and partners a controlled extension framework.

Component	Description
Portal Studio	Configuration layer for branding, navigation, widgets, journeys, content, forms and audience segmentation.
Request Catalogue	Customer-friendly service catalogue experiences mapped to Halo tickets, request types and workflows.
Knowledge Experience	Search, recommended content, article presentation, deflection metrics and controlled AI-assisted guidance.
Case / Ticket Experience	Modern ticket logging, status tracking, communication, approvals and feedback.
Audience Personalisation	Different portal experiences by customer, contract, department, site, user group, language or persona.
Dashboards	Executive, service owner and customer success dashboards using Halo data with clear, governed metrics.
Integration Layer	Secure API connector and abstraction layer to read and write relevant Halo objects with least-privilege access.
Marketplace / Templates	Reusable sector templates for MSP, enterprise IT, HR, facilities, education, public sector and manufacturing use cases.

### Initial MVP scope

- Multi-tenant portal application with customer-specific branding and navigation.
- Halo API connector for authentication, tickets, users, request types, assets and knowledge.
- Service catalogue and guided request forms mapped to Halo workflows.
- Knowledge search and article display with measurement of search success and deflection.
- Ticket tracking, approvals, comments, attachments and feedback.
- Admin configuration console for portal settings, roles and templates.
- Pilot-ready security model, logging, monitoring, backup and support processes.

## 5. Innovation and R&D challenge

**The project must be positioned as R&D, not routine software build.** The technical uncertainty is not whether a web portal can be built. The uncertainty is whether HaloNinjas can create a secure, repeatable, multi-tenant, configurable experience product that works across diverse Halo customer deployments without collapsing into bespoke customer code.

R&D area	Technical / commercial uncertainty
Configurable experience model	Develop a metadata-driven journey and widget model that lets different customers configure experiences without creating forked codebases.
Halo abstraction layer	Create a stable integration model that maps Halo objects, permissions and workflows into reusable product concepts while handling customer-specific configuration differences.
Multi-tenant security	Design tenant isolation, identity federation, least-privilege API access and audit logging suitable for MSP and enterprise use.
Performance and resilience	Manage rate limiting, caching, background synchronisation and API error states while keeping user journeys fast and reliable.
Knowledge and AI governance	Evaluate controlled AI-assisted search and guidance without exposing sensitive data or inventing untrusted answers.
Accessibility and UX validation	Test whether service management journeys can be simplified for non-technical users while preserving workflow and compliance requirements.
Repeatable deployment	Build provisioning, configuration, monitoring and update processes that allow repeated customer deployment at low marginal cost.

## 6. Technical architecture

**Indicative architecture.** The final architecture should be validated during the first R&D phase, but the grant proposal can use the following as a credible baseline.

Layer	Indicative approach
Front end	React / Next.js or equivalent modern web stack; responsive design; potential progressive web app capability.
Experience services	Node.js / .NET services for portal composition, widget rendering, catalogue configuration and user/session management.
Halo integration layer	Secure connector using Halo REST API, OAuth2, tenant-specific credentials, permission scopes, event polling/webhooks where available, retry and backoff strategy.
Data layer	Azure SQL / PostgreSQL for configuration and audit data; Redis/cache layer for high-read portal content; encrypted secrets vault.
Identity	OIDC/SAML support, Microsoft Entra ID integration, MFA compatibility, local invite flows where required.
AI / search	Search index and optional retrieval-augmented AI guidance constrained to approved knowledge content and logged for governance.
DevOps	Azure-hosted infrastructure-as-code, CI/CD, automated tests, vulnerability scanning, monitoring and release management.
Compliance	Data minimisation, audit logs, data processing agreement templates, UK GDPR readiness, accessibility testing and secure SDLC evidence pack.

## 7. Scottish delivery model

**The delivery model is intentionally Scottish-based.** The project should create a small but high-impact product team with a practical recruitment footprint across Perthshire, Dundee and/or Inverness.

Location / asset	Role in project
Perthshire	Leadership, product ownership, customer discovery, HaloNinjas domain expertise and founder oversight.
Dundee	Primary development and UX recruitment target due to software, games, design and digital talent pool; potential links to Abertay and University of Dundee.
Inverness / Highlands	Secondary development hub or remote-working cluster; potential HIE engagement if material project activity is located in the HIE area.
Hybrid working	Flexible Scottish-first team model, with periodic workshops and sprint reviews in Perth/Dundee/Inverness.
University links	Potential academic collaboration on accessibility, service design, AI-assisted knowledge, cybersecurity or product validation.
Supplier links	Use Scottish specialists for UX research, security testing, product branding, legal/IP advice and digital marketing where practical.

## 8. Work packages and deliverables

WP	Work package	Timing	Main activities	Key outputs
WP1	Discovery, architecture and validation	M1-M2	User research, technical feasibility, competitor review, product requirements, R&D plan, IP baseline	Validated architecture, MVP backlog, pilot success criteria
WP2	Halo integration R&D	M2-M6	API connector, auth model, ticket/user/request/KB mappings, error handling, caching, data isolation	Reusable Halo connector and integration test harness
WP3	Portal studio and design system	M2-M8	Branding, navigation, layouts, widgets, roles, content blocks, accessibility patterns	Configurable portal framework and admin console
WP4	Self-service modules	M4-M11	Catalogue, guided forms, ticket status, approvals, comments, attachments, knowledge search	MVP customer and employee portal modules

WP	Work package	Timing	Main activities	Key outputs
WP5	Security, tenancy and operations	M5-M13	Tenant model, audit, logging, backup, secrets, monitoring, secure SDLC, data minimisation	Security pack, operations runbook, pilot-ready service
WP6	Knowledge and AI-assisted experience	M8-M14	Search relevance, recommended articles, controlled AI guidance, analytics, governance	AI/search prototype and deflection analytics
WP7	Pilot deployments	M10-M16	3-5 pilot deployments, feedback loops, performance testing, accessibility review, UX measurement	Pilot evidence pack and product refinement backlog
WP8	Commercialisation and launch readiness	M15-M18	Pricing, packaging, partner enablement, onboarding docs, support model, launch assets	Launch-ready product, sales pack and partner onboarding kit

## 9. Milestone plan

Milestone	Name	Target	Evidence
M1	Project mobilisation complete	Month 1	Team onboarding, governance, technical backlog, final project plan
M2	Architecture validated	Month 2	Architecture decision record, threat model, R&D assumptions, pilot criteria
M3	Halo connector alpha	Month 4	Authentication, core ticket/user/request mappings, test harness
M4	Portal framework alpha	Month 6	Branding, navigation, roles, basic widget framework
M5	MVP feature complete	Month 10	Catalogue, knowledge, ticket tracking, approvals, admin configuration
M6	Pilot readiness gate	Month 12	Security review, support runbook, test results, onboarding guide
M7	Pilot evidence complete	Month 16	Pilot metrics, customer feedback, bug closure, performance and adoption evidence
M8	Commercial launch gate	Month 18	Pricing, packaging, partner pack, website/collateral, roadmap, support model

## 10. Budget and funding request

**Indicative budget.** The budget below is intentionally set at a scale that can support a credible product build and align with larger R&D grant thresholds. It should be reviewed by a grant adviser and accountant before submission because eligible costs, intervention rates, claims processes and match funding rules vary by route.

Cost category	Budget	Rationale
Payroll and employment costs	£742,500	Core Scottish product team across architecture, development, UX, QA, DevOps and product leadership.
Specialist R&D subcontractors	£120,000	Security architecture, penetration testing, UX research, AI/search specialist support, accessibility validation.
Cloud, tooling and test infrastructure	£70,000	Azure environments, CI/CD, observability, test data, staging, software tools and devices.
Pilot deployment and validation	£25,000	Pilot onboarding, support, customer workshops, measurement and product validation.
IP, legal, grant compliance and commercial readiness	£25,000	IP/trademark review, grant reporting support, DPA templates, pricing and packaging support. Eligibility to confirm.
Travel, workshops and Scottish ecosystem engagement	£12,500	Perth/Dundee/Inverness workshops, customer validation and university engagement.
Project management, finance and audit support	£30,000	Project controls, finance reporting, evidence packs, claims administration and quality

Cost category	Budget	Rationale
Total indicative project cost	£1,025,000	governance. Target project cost before any grant eligibility adjustments.

Scenario	Total cost	Indicative grant	Grant %	Comment
Primary ask	£1,025,000	£450,000	44%	Company/private match funding: £575,000
Higher support case	£1,025,000	£500,000	49%	Requires eligibility and grant body agreement; closer to SME upper range.
Reduced MVP	£750,000	£300,000	40%	Smaller team, removes AI/search R&D and reduces pilot scope.
Feasibility first	£140,000	£84,000-£98,000	60%-70%	Only relevant if SMART/feasibility route is open and applicant qualifies.

### Recommended initial ask

Use the £1.025m programme and a £450k grant request as the opening funder discussion case. It is big enough to support a real Scottish team and product build, but still leaves HaloNinjas showing material private commitment and commercial risk sharing.

## 11. Match funding and additionality

**Match funding is likely to be a key funder question.** The proposal should be supported by a clear private funding plan. The strongest options are retained profits, founder/director investment, committed customer pilot fees, private angel/seed investment, partner co-funding, or a dedicated product company raise.

- Grant request is not a substitute for commercial commitment; it accelerates productisation and Scottish hiring.
- Without grant support, the project would likely proceed through slower client-funded custom development, reducing the chance of creating reusable IP.
- Grant support allows the company to take on technical risk before enough product revenue exists to fund a full product team.
- Funding should not be committed to project work before grant approval where the target route prohibits started work.

### Evidence to prepare

A funder will likely ask for management accounts, cashflow, balance sheet, confirmed match funding source, existing customer evidence, letters of support, CVs of key staff, IP ownership position, and a clear statement that the project has not started.

## 12. Commercialisation model

**Revenue model.** The product should be sold as SaaS subscription plus onboarding and optional premium templates. Consulting remains valuable, but the grant narrative should emphasise recurring software revenue and partner-enabled scale rather than pure professional services.

Revenue stream	Description
SaaS subscription	Monthly or annual subscription tiered by number of portal users, modules, environments and support tier.
Implementation package	Fixed-fee onboarding and configuration delivered by HaloNinjas or certified partners.
Premium templates	Paid templates for MSP, HR, facilities, education, public sector, healthcare, manufacturing and customer service portals.
Partner channel	Enable Halo partners to resell, configure and support the portal with



Revenue stream	Description
Enterprise support	revenue share or margin. Premium support, security review support, dedicated environments and advanced reporting.
Expansion revenue	Additional modules, branded portals, business units, languages, analytics and AI-assisted knowledge capabilities.

Period	Customer target	Recurring revenue target	Commercial focus
Year 1 - Build / pilots	3-5 pilots	£30k-£75k pilot revenue	Validate product-market fit and evidence base.
Year 2 - Initial launch	30 paying customers	£240k ARR	Direct HaloNinjas customers and early partner referrals.
Year 3 - Partner scale	90 paying customers	£810k ARR	Partner enablement, templates and repeatable onboarding.
Year 4 - International scale	180 paying customers	£1.8m ARR	International partner channels and larger enterprise deployments.
Year 5 - Product company maturity	300 paying customers	£3.6m ARR	Broader ecosystem product with support, success and channel team.

Forecasts are planning assumptions only. They should be validated with current customer discovery, competitive pricing analysis and accountant review before use in a formal application.

## 13. Scottish economic impact

**The economic impact case is central.** The project should be presented as a route to Scottish-owned product IP, skilled technology employment and exportable revenue. The grant body needs to see that the public funding creates additional economic value in Scotland, not only a private benefit to HaloNinjas.

Impact area	Target / rationale
Direct jobs	8 FTE by project end; 15 FTE by year 3; 25 FTE by year 5 under base case.
Job quality	Real Living Wage commitment, flexible working, apprentices/graduate routes where feasible, investment in training and inclusive recruitment.
Scottish supply chain	Local use of UX, security testing, legal/IP, product marketing, academic partners and technology providers where practical.
Product IP	Scottish-owned software IP with potential to become a separate high-growth product business.
Export potential	SaaS sold to UK and international Halo customers and partners; revenue not limited to Scottish market.
Innovation spillover	Methods, tooling, templates and knowledge that improve service experience design across multiple sectors.
Regional development	Opportunity to anchor remote/hybrid technology jobs outside the central belt, especially Perthshire, Dundee and Inverness.
University engagement	Potential student projects, placements, research collaboration and graduate hiring links.

## 14. IP, partner and legal position

**IP ownership must be clean.** The applicant should own the product code, configuration framework, templates, integration layer and documentation generated through the project. Any subcontractor and employee contracts should assign relevant IP to the applicant or product company.

- Create an IP register before work starts: source code, architecture, templates, documentation, brand assets and domain names.
- Ensure all developer, contractor, designer and academic collaboration agreements clearly define ownership and exploitation rights.
- Clarify trademark and naming position for any use of Halo in product name, website, sales collateral or grant publicity.
- Avoid presenting the product as officially endorsed by Halo unless there is written permission or partner agreement.



- Consider a neutral legal product name with a descriptive tagline: e.g. "Service Experience Hub - for organisations using Halo".
- Prepare data processing, security, support, EULA and SaaS subscription terms before pilot deployment.

## 15. Fair Work, inclusion and net zero

**Grant-ready commitments.** The proposal should explicitly commit to the Scottish Government fair work and net zero expectations. The wording below can be adapted for the final grant form.

Commitment	Draft response
Fair pay	Commit to paying at least the Real Living Wage to all employees and contractors where applicable, with transparent pay bands for technology roles.
Effective voice	Create regular employee feedback channels, sprint retrospectives, one-to-ones and clear escalation routes.
Flexible working	Offer flexible and family-friendly working from day one, suitable for hybrid Scottish technology roles.
No inappropriate zero-hours use	Core product roles will be employed or contracted on defined terms appropriate to the work; no inappropriate zero-hours contracts.
Diversity and inclusion	Recruit across geography, background and career stage; use inclusive job adverts and consider graduate/junior pathways.
Skills development	Budget and time for training in secure development, accessibility, cloud, Halo APIs and product management.
Net zero plan	Remote-first delivery, limited travel, cloud resource efficiency, low-paper operations and supplier preference for credible environmental policies.
Accessibility	Build accessibility into product design and test against WCAG principles as part of the quality gate.

## 16. Risk register

Risk	Likelihood	Impact	Mitigation
Halo API changes or limitations	Medium	High	Create abstraction layer, integration tests, version monitoring and close partner communication.
Trademark / partner positioning risk	Medium	High	Use working title internally; confirm permission or launch under neutral brand.
Grant eligibility gaps	Medium	High	Engage Scottish Enterprise/HIE early; validate eligible costs and intervention rate before committing spend.
Scope creep into custom consultancy	High	High	Product governance board, strict template strategy, clear MVP boundaries and feature triage.
Security / tenant isolation risk	Medium	High	Threat model, secure SDLC, least privilege, pen test, code review and logging.
Recruitment challenge	Medium	Medium	Hybrid roles, Dundee/Inverness talent routes, contractor bridge, university links.
Pilot customers slow to engage	Medium	Medium	Secure letters of support and named pilot sponsors before grant submission.
Revenue slower than forecast	Medium	High	Stage-gated spend, partner channel validation, pricing tests and optional services revenue bridge.
AI trust / data protection concerns	Medium	Medium	Make AI optional, retrieval-only, auditable and constrained to approved knowledge content.
Insufficient match funding	Medium	High	Confirm finance plan, cashflow capacity and grant claims timing before application.

## 17. Governance and reporting

- Monthly project board chaired by the project sponsor with product, technical, finance and delivery representation.
- Quarterly grant evidence pack: timesheets, invoices, payroll evidence, technical deliverables, milestone reports and finance reconciliation.
- Stage-gate decisions at architecture validation, MVP feature-complete, pilot readiness and commercial launch.
- Product backlog maintained with clear distinction between grant-funded R&D, customer-specific work and commercial launch activity.
- Security and data protection review before any pilot accesses live customer data.
- IP register and source code repository controls from day one.

## 18. Pilot and evidence plan

**A grant body will want evidence that the market exists.** The following evidence should be collected before and during the application process.

Evidence type	Action
Customer discovery	10-15 structured interviews with current/prospective Halo customers and partners.
Letters of support	3-5 letters confirming portal pain points, willingness to pilot and expected value.
Pilot cohort	3-5 pilot organisations across MSP, enterprise IT and one non-IT service area such as HR/facilities.
Commercial validation	Indicative pricing feedback, budget owner evidence and route-to-market assumptions.
Technical validation	API feasibility tests, architecture assumptions, security review and data model mapping.
Economic evidence	Recruitment plan, local salary assumptions, supplier quotes, university engagement notes and export assumptions.
Grant evidence	Match funding evidence, management accounts, cashflow, CVs, project plan and procurement evidence as needed.

## 19. Draft Scottish Enterprise enquiry narrative

*HaloNinjas Ltd is seeking support for an 18-month R&D project to develop a Scottish-owned software product currently working-titled the Halo Experience Portal. The project will create a configurable SaaS experience layer that integrates with Halo service management platforms and enables organisations to deploy modern, branded self-service journeys across IT, HR, facilities, customer service and managed services. The project involves technical uncertainty around secure multi-tenant architecture, API abstraction, metadata-driven portal configuration, user experience simplification, knowledge/search capability and repeatable deployment across diverse customer environments. The project will be delivered by a Scottish-based product team across Perthshire, Dundee and/or Inverness, creating high-value technology jobs and exportable product IP. We are seeking grant support because the project requires upfront R&D investment before product revenue exists and would otherwise proceed more slowly as bespoke consultancy work, reducing the creation of reusable Scottish IP and economic impact.*

Use this narrative as a starting point only. The final Scottish Enterprise enquiry should be tailored to the exact form fields and eligibility feedback from the adviser.

## 20. Cover email template

Subject: Initial enquiry - R&D grant support for Scottish software product development project

Dear [Name],



#### Halo Experience Portal - Grant Project Pack

I am contacting you on behalf of HaloNinjas Ltd to ask whether our proposed software product development project may be suitable for R&D grant support.

We are planning an 18-month project to build a Scottish-owned SaaS product currently working-titled the Halo Experience Portal. The product would extend Halo service management deployments with a configurable experience layer for self-service, knowledge, request catalogues, dashboards and secure workflow integration.

The project is intended to create new product IP in Scotland, recruit a development team in the Perthshire / Dundee / Inverness area, and create a scalable recurring-revenue product with UK and international sales potential. We estimate total project costs of approximately £1.025m and are exploring grant support in the region of £450k, subject to eligibility and intervention rates.

I have attached a short project pack and budget workbook. We would welcome an initial conversation to confirm whether this is potentially aligned with your current funding priorities and what evidence you would need from us before a formal application.

Kind regards,  
Jon Adlum  
Co-Founder and Director, HaloNinjas Ltd  
[Email] | [Phone]

## 21. Pre-submission checklist

Checklist item	What to confirm
Legal applicant confirmed	Company name, company number, registered address, bank details and VAT position confirmed.
Grant route selected	Scottish Enterprise / HIE / Innovate UK / Interface route selected based on adviser feedback.
No work started	Confirm no grant-funded project work has started before approval, where required by the scheme.
Match funding evidence	Board approval, cash, investment, bank facility, retained profits or other match funding evidenced.
IP ownership	Employee, contractor and academic agreements assign project IP appropriately.
Halo naming / trademark	Permission or neutral naming strategy confirmed.
Customer evidence	Letters of support, pilot candidates, interview notes and pricing feedback collected.
Financials	Management accounts, forecasts, cashflow and budget workbook reviewed by accountant.
CVs and team	CVs/job descriptions for key personnel prepared.
Fair work/net zero	Commitments and internal policies drafted.
Security/data	DPA, privacy, security and hosting approach defined for pilots.
Grant evidence process	Timesheets, payroll records, invoices, procurement and reporting process ready from day one.

## 22. Source notes used in this draft

Source	URL
Scottish Enterprise R&D Grants	<a href="https://www.scottish-enterprise.com/how-we-can-help/funding-and-grants/business-grants-and-funding-calls/research-and-development-grants">https://www.scottish-enterprise.com/how-we-can-help/funding-and-grants/business-grants-and-funding-calls/research-and-development-grants</a>
Find Business Support - Scottish Enterprise R&D grants	<a href="https://findbusinesssupport.gov.scot/service/funding/research-and-development-grants">https://findbusinesssupport.gov.scot/service/funding/research-and-development-grants</a>
Find Business Support - funding to support R&D projects	<a href="https://findbusinesssupport.gov.scot/service/funding/funding-to-support-research-and-development-projects">https://findbusinesssupport.gov.scot/service/funding/funding-to-support-research-and-development-projects</a>
SMART: SCOTLAND grant page	<a href="https://www.scottish-enterprise.com/how-we-can-help/funding-and-grants/business-grants-and-funding-calls/smart-scotland-grant">https://www.scottish-enterprise.com/how-we-can-help/funding-and-grants/business-grants-and-funding-calls/smart-scotland-grant</a>
HIE Digital and Technology Adoption Capital Grant	<a href="https://findbusinesssupport.gov.scot/service/funding/digital-and-technology-adoption-capital-grant">https://findbusinesssupport.gov.scot/service/funding/digital-and-technology-adoption-capital-grant</a>
Interface Standard Innovation Vouchers	<a href="https://interface-online.org.uk/vouchers/standard-innovation-vouchers/">https://interface-online.org.uk/vouchers/standard-innovation-vouchers/</a>
UKRI Innovate UK Smart Grants guidance	<a href="https://www.ukri.org/councils/innovate-uk/guidance-for-applicants/guidance-for-specific-funds/smart-innovation-funding-guidance/">https://www.ukri.org/councils/innovate-uk/guidance-for-applicants/guidance-for-specific-funds/smart-innovation-funding-guidance/</a>
Halo Service Solutions overview	<a href="https://haloservicesolutions.com/">https://haloservicesolutions.com/</a>
HaloITSM features	<a href="https://usehalo.com/haloitsm/features/">https://usehalo.com/haloitsm/features/</a>
Halo API documentation	<a href="https://haloitsm.com/apidoc/">https://haloitsm.com/apidoc/</a>