

Forma Innovations (“Forma”) secures £8.3m Shawbrook Facility to acquire Retail Manager Solutions and fund the future growth of the group

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- Forma is a leader in data-driven software and services for retail planning, space planning, survey and design.
- An existing client, Forma, was looking to expand its services with the acquisition of Retail Manager Solutions and approached Shawbrook for incremental facilities.
- Shawbrook structured a flexible package, combining term loans, revolving credit, and follow-on committed facilities to meet the client's full requirements.

Retail software and services provider Forma has secured new facilities totalling £8.3m from existing funder Shawbrook to support the acquisition of Retail Manager Solutions. This strategic move underscores Forma Innovations' focus on providing cutting-edge technology and a service-driven approach to their clients.

Established in 1984, Forma Innovations is a leading provider of data-driven software and services to survey, manage, and optimise predominantly retail spaces. The business has been instrumental in supplying business-critical solutions to some of the UK's largest retailers, including Sainsbury's, Primark, and Asda.

Forma Innovations has experienced substantial growth, especially since its partnership with investor Tern Capital, who has backed the business since 2023. The client was looking to fund future growth and further expand its services with the acquisition of Retail Manager Solutions, a software and services firm that helps multi-site businesses run more effectively and supports their clients at over 14,000 business locations globally.

Shawbrook, with in-depth knowledge of the client's business structure and strong tech sector experience, arranged an £8.3m funding package consisting of term loans, revolving credit, and follow-on committed facilities. The acquisition represents a significant uplift for Forma Innovations, unlocking new software services, customer bases, and cross-sell opportunities.

Karthik Dasari, Director at Forma said, “Having built a strong relationship with Shawbrook, we felt confident that their team would provide a solution to meet our multiple objectives. Their innovative approach overcame several challenges presented by the acquisition structure, and our long-standing partnership made this a smooth transaction.”

John Palmer, Senior Director at Shawbrook commented, “At Shawbrook, we foster long-term, mutually beneficial relationships. Our commitment extends beyond initial transactions as we continuously support our clients through their growth journeys. In Forma's case, we recognise their strong market position, experienced management team, and dedication to exceptional client service, which is reflected in our ongoing support.”

Pinsent Masons acted for Shawbrook on the transaction, with financial diligence support provided by Mazars.

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