Scottish Enterprise & MyBusiness ID User Testing

April 1st 2015 - Marianne O'Loughlin & Laura Sheen

Scottish Enterprise

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Award-winning Service Design

Contents

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Executive summary

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Findings

Overview of the study

In March 2015 Nile ran 12 x user research sessions with target users of the Scottish Enterprise (SE) website. Four of the interviews were face to face and eight were conducted remotely via online conferencing software. These sessions involved interviewing the participants about their experience of accessing the SE website as well as several key areas of the site. Each participant was asked their initial impressions on the homepage and were then given three tasks relating to the Knowledge Hub section, Services section and finally signing up for an account using MyBusinessID. These sessions explored how they searched for information and the user journeys associated with these tasks.

This report documents the findings from this study as well as feedback from the Solutions Workshop, carried out at Nile's office in Edinburgh on Thursday 26th March with key members of the SE team.

Key findings

- The current homepage design does not convey what SE does and the businesses it helps.

- There is no clear user journey through the site for either the 'confused' or 'convinced' personas.

- The content of the site did not meet participants' expectations. They expected some guide content and were surprised not to find any.

- The participants could not find an industry category that reflected their business accurately.

- Participants missed the filter in the "Knowledge Hub" but this functionality was important as this section is large and diverse.

- The clear user journey on the "Infinite Possibilities" site was really well received.

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About this project

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Background to the project

Scottish Enterprise are looking to review the Scottish Enterprise (SE) website and the My Business ID (MBID) service. SE would like to test whether these sites are fit for purpose as well as ascertain what improvements can be made to enhance the user experience, now and in the future.

Scottish Enterprise is committed to ongoing incremental improvements and the testing in this project is part of a longer term programme.

Of particular interest in this round of testing of the Knowledge Hub and Services section is:

- Understanding motivations behind current users' behaviour on the SE website

- Feedback on the current user experience; navigation, content, layout

- Identifying gaps in the current user experience / content e.g. adding value across multiple devices (not currently catered for)

- Users' understanding of the MBID service and any barriers to use.

- Looking at the experience through the lens of the two personas 'convinced' and 'confused'

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Project objectives

The original research objectives identified by Scottish Enterprise were:

Knowledge Hub Section

- Do people find the "Knowledge Hub' when searching for relevant content?

- When using the 'Knowledge Hub', does the filter work?

- When reading webpages, how well does the 'related content' section work?

- How does this vary when applied with the two personas - 'convinced' and 'confused'

Services Section

- Do the Services page names resonate with customers?

- Do customers find the right content when using these pages?

- Does the layout of the subpages work well?

- How does this vary when applied with the two personas - 'convinced' and 'confused'?

MyBusinessID

- Ascertain if the combined Login/Register functionality works

- Examine usability of shared social media (LinkedIn) and MBID login/register options

- Do customers trying to access a service have their journey supported or interrupted by the MBID login/register functionality?

- Check how well customers understand and experience customer journeys across partner websites

  - Does the user recognise that it is MBID on both sites?

  - Does the user successfully use their MBID, created on Scottish Enterprise, to log into a partner website?

  - Are there any pain points in this process?

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Methodology

Methodology

The method used to conduct this study consisted of:

- Four x face to face user labs in Edinburgh

- Eight x remote user labs across Scotland

The breakdown of participants for this study was:

- 18 - 65 year old

- Male and female

- Scottish businesses

- Not currently relationship managed by Scottish Enterprise

- Range of business sectors

- Variation in business life stage: start-up, growing, established, expanding

- Range of business sizes - by turnover

Both the face to face and remote sessions followed the same format:

- Pre test interview

- 2 x information seeking tasks

- 1 x register / login task

- Wrap up interview

Face to face interviews were conducted in Nile's Edinburgh office while remote session participants controlled the moderator's desktop via GoToMeeting web conferencing software to complete the tasks.

Participant details can be found on the following two slides.

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Face to Face Participants

Participant number	Gender	Age	Job title / Industry	Role	Business Life Stage
1	F	43	Manufacturing; Bathrooms	Senior	Established & Expanding
2	M	36	Manufacturing & Retail: Instruments	Senior	Growing
3	F	48	Scottish Massage Schools	Senior	Established & Growing
4	F	65	Relocation Manager	Senior	Established and Expanding

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Remote Participants: Table

Participant number	Gender	Age	Job title / Industry	Role	Business Life Stage
5	M	28	Education: Director of paralegal qualifications	Influential	Established & Expanding
6	M	30	Creative Industry: Interior Designed	Influential	Established & Expanding
7	M	35	Co-Director: Technology: IT software developer	Senior	Growing
8	F	60	Managing Director: Chemical Wholesale	Senior	Established
9	M	32	Creative Industry: Graphic Designer	Senior	Growing
10	F	28	Creative Industry: Artist/Illustrator	Senior	Start up & Growing
11	M	38	Engineering: Company Director	Senior	Start up
12	F	28	Creative Industry; Artist/Designer	Senior	Growing

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Insight & recommendations

1. Content
2. Functionality
3. Design
4. Prioritisation of issues

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1. Content

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Unclear what SE does from homepage

HIGH: The homepage doesn't convey what SE does and who the target audience is.

Although all of the participants had heard of SE they were unclear about what kind of help they gave to what kind of businesses. When they were shown the homepage they were still unclear about this and tried to gain clues from the kind of content that was shown here which lead to some misconceptions:

• SE helps companies that want to expand globally

• SE helps big businesses

• SE helps businesses who are "innovating"

In contrast the "Infinite Possibilities" landing page stated at the top a positioning statement about who SE helped and this was well received.

RECOMMENDATION: In the short term SE can work within the current template to convey what SE does and link through to the "Services" section. However, in the longer term SE needs to look at how effective this is via the website analytics and consider if a more fundamental redesign is needed to support a clearer user journey.
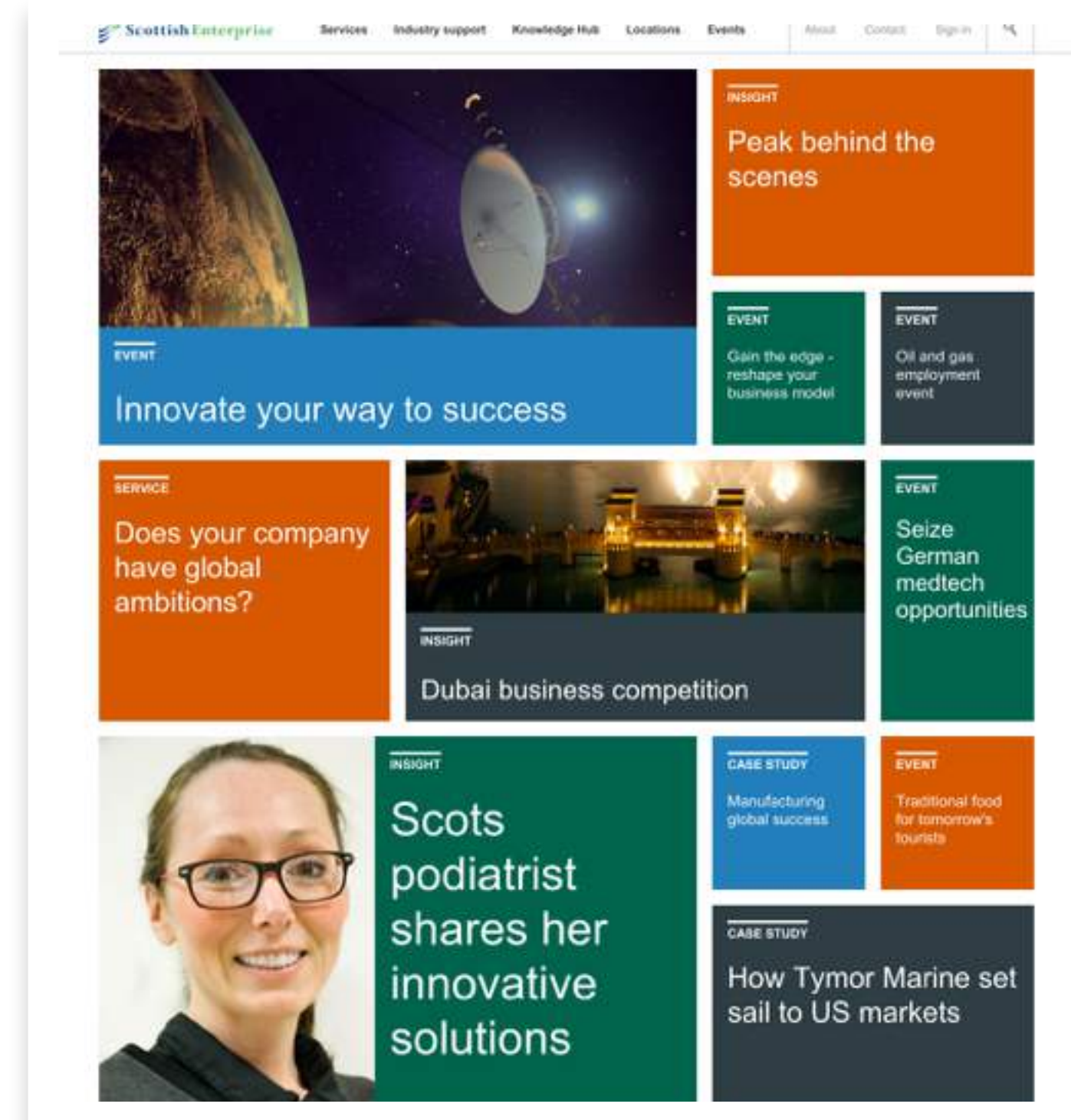
Participant 12

" Homepage reaffirms what I thought, that Scottish Enterprise is for bigger companies than me"

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Content
The tiles did not convey content clearly

MEDIUM: The participants did not aways get the content they expected when they clicked on the tiles on the homepage. There were two reasons for this:

- The content type tags were not noticed on the homepage - participants were surprised to go into an event

- The title text did not always convey clearly what the target content was

  - "Peak behind the scenes" lead to a case study about a company called Peak

  - "Innovate your way to success" lead to an event rather than more general content

RECOMMENDATION: The title text on the tiles on the homepage needs to be more explicit about the subject and type of content they lead to. Consider if a rollover state can be added to give the user more information on the content before they click through.

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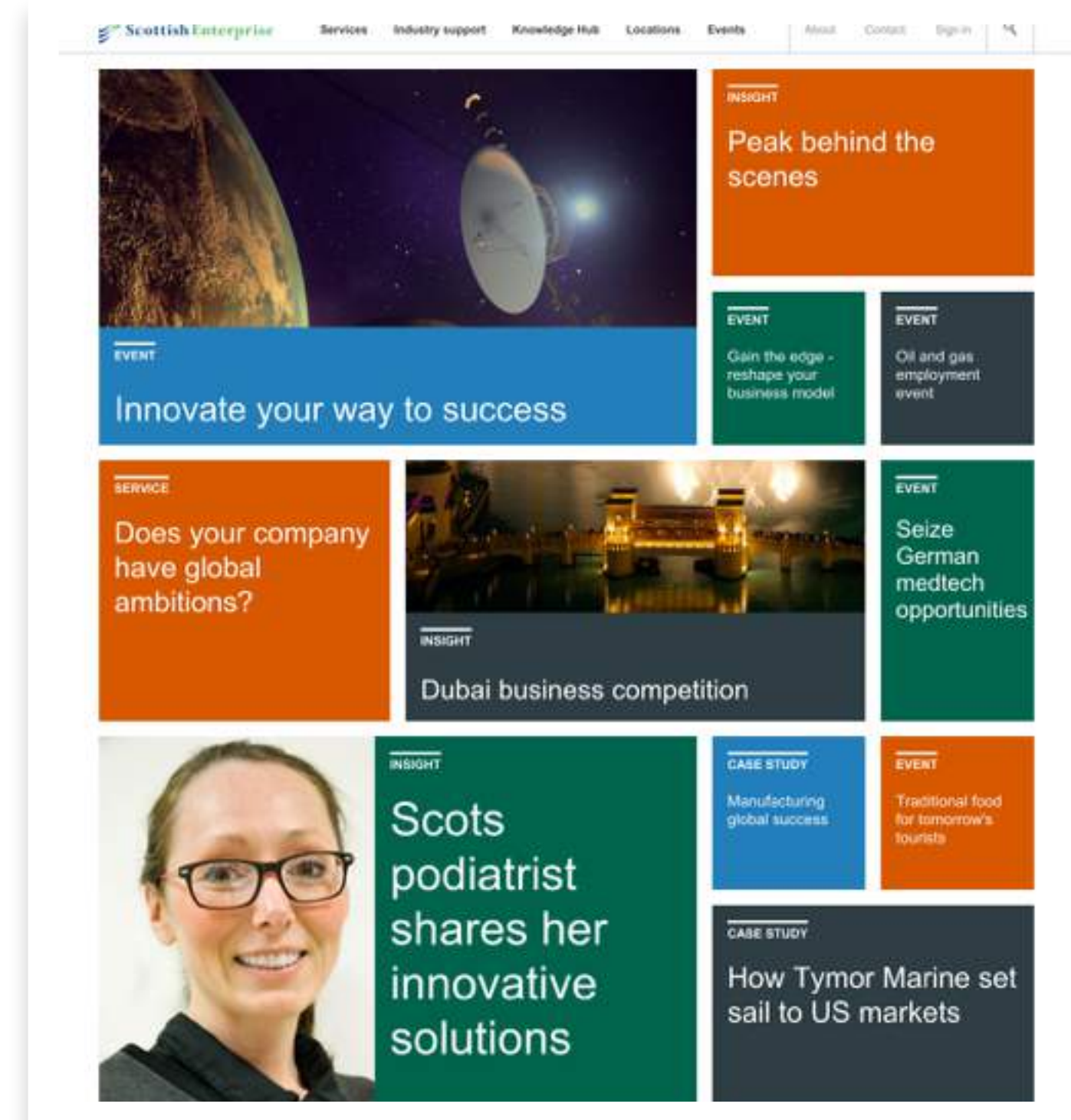
Primary navigation comments

OBSERVATION: We explored participants' understanding of the top level headings - "Services", "Industry Support" and "Knowledge Hub".

- "Services" and "Industry Support": Although there was felt to be some cross over between these sections, generally participants got what they were trying to do. If they noticed the top navigation they were more likely to go into 'Industry Support". This is because of the active term "support" appearing helpful and they were very focused on what industry they were in and what help was available. Generally they found this section of limited use (see p19).

- "Knowledge Hub": Participants did not tend to navigate here of their own initiative. When we asked them to find some information about expanding into the Middle East, they looked at specific content items from the homepage (see p32) and in "Services" and "Industry support" but generally they didn't click into the "Knowledge Hub". When questioned about this there was a mixed understanding of what content is there - some thought it would just be case studies. However, from our general experience this kind of area isn't of primary interest, but rather is more accessed via contextual links from other more concrete content (like "Services").

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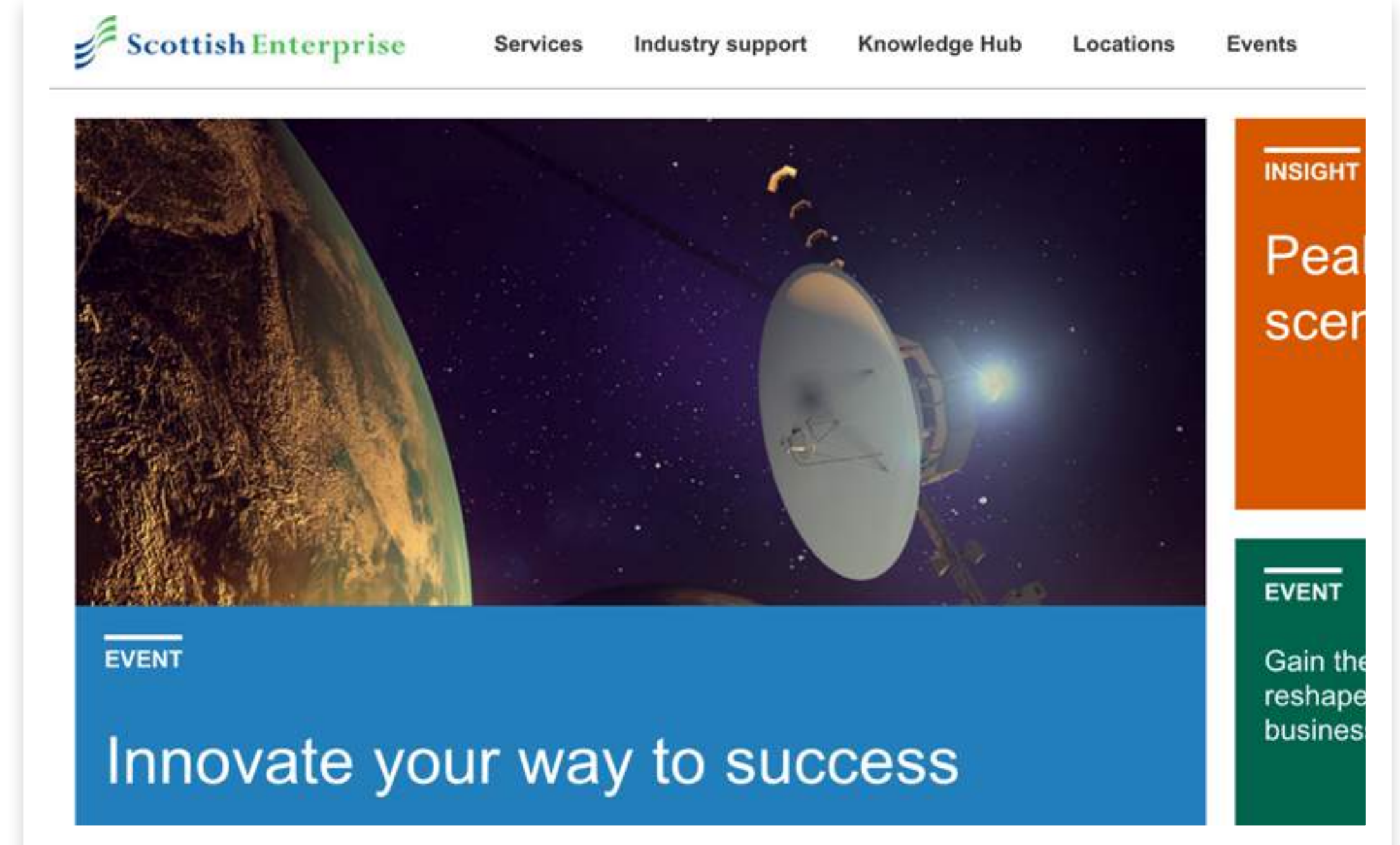
Content
There is no guide content

MEDIUM: The content type did not meet the expectations of participants in this study. There was an assumption that they would find some content on the website that would provide guide content: help and advice that supports the goals of their business. One participant had used the old Business Link website and expected content similar to the guides that were found on that. The current content fell short of these expectations because:

- There is no guide content.

- The 'Services' content drove participants towards events, grant applications and contacting SE, rather than offering advice on the site.

- As the content is organised around SE services, it appeared very specific to participants who were trying to get a more general sense of what help they need and how SE can support them.

This content exists on the Business Gateway site but there was no reference to that content or links.

RECOMMENDATION: Consider this issue when reviewing how to improve the user journey on the site. In the short term consider linking to Business Gateway or duplicating this content on the SE site.
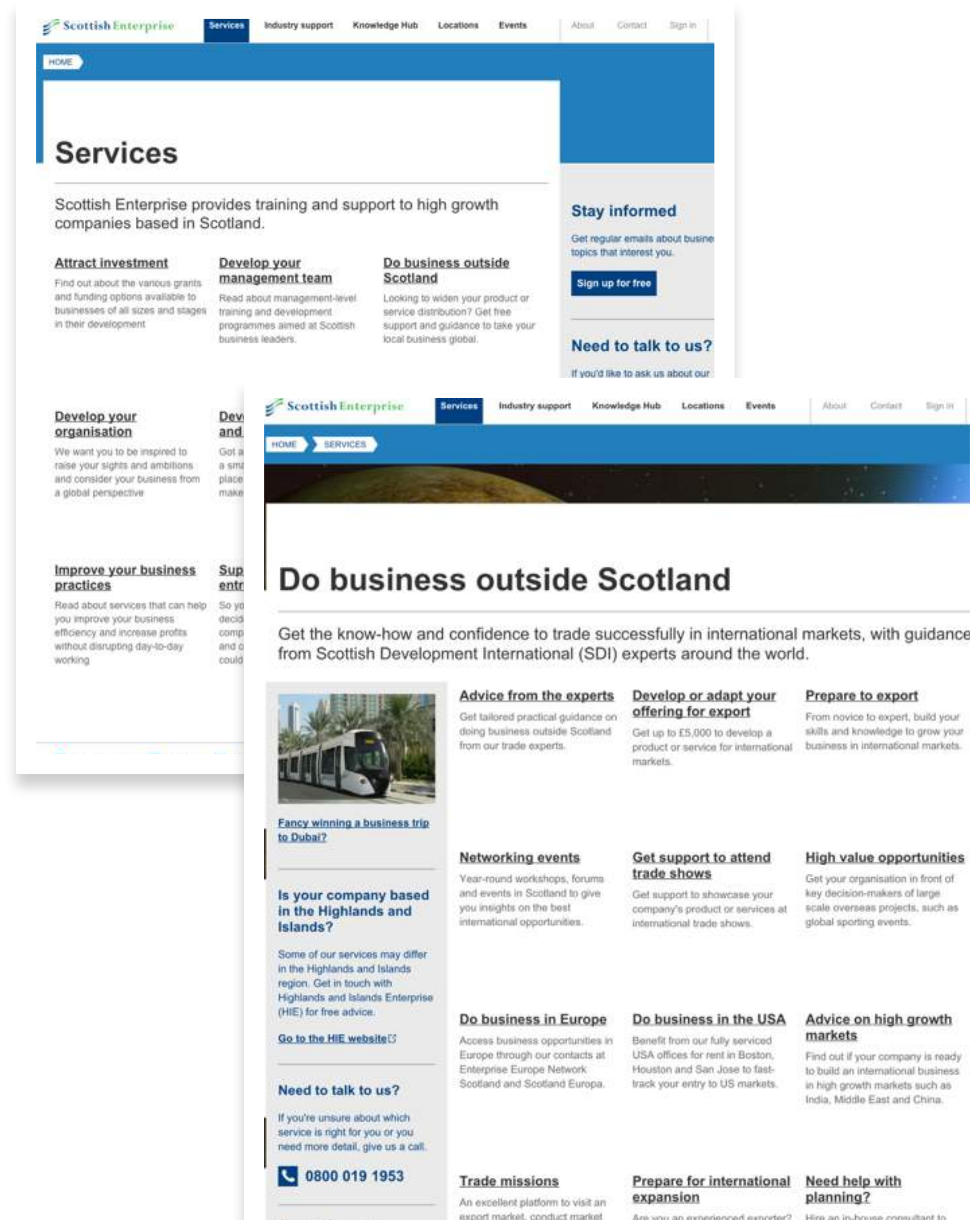
Services content surprised participants

MEDIUM: In the "Services" section participants struggled to find something useful in the second level unless they had a specific goal or need. The links lead them to decision tree flow to help them understand if they were eligible for a programme or grant for support on a topic.

All the participants were surprised by this. They were generally expecting more general content (see previous page).

Those who were closer to the "Convinced" persona liked this approach, even if it was not what they were expecting as they could quickly find out if something applied to them.

However the participants who were closer to the "Confused" category were looking for more general help and support on the site rather than jumping straight into a decision tree to see if they were eligible for a service. In some cases, such as the example shown bottom right, there was very little scene setting for the service and no onward journey for users who were not looking for a service, but more general content.

RECOMMENDATION: See previous page

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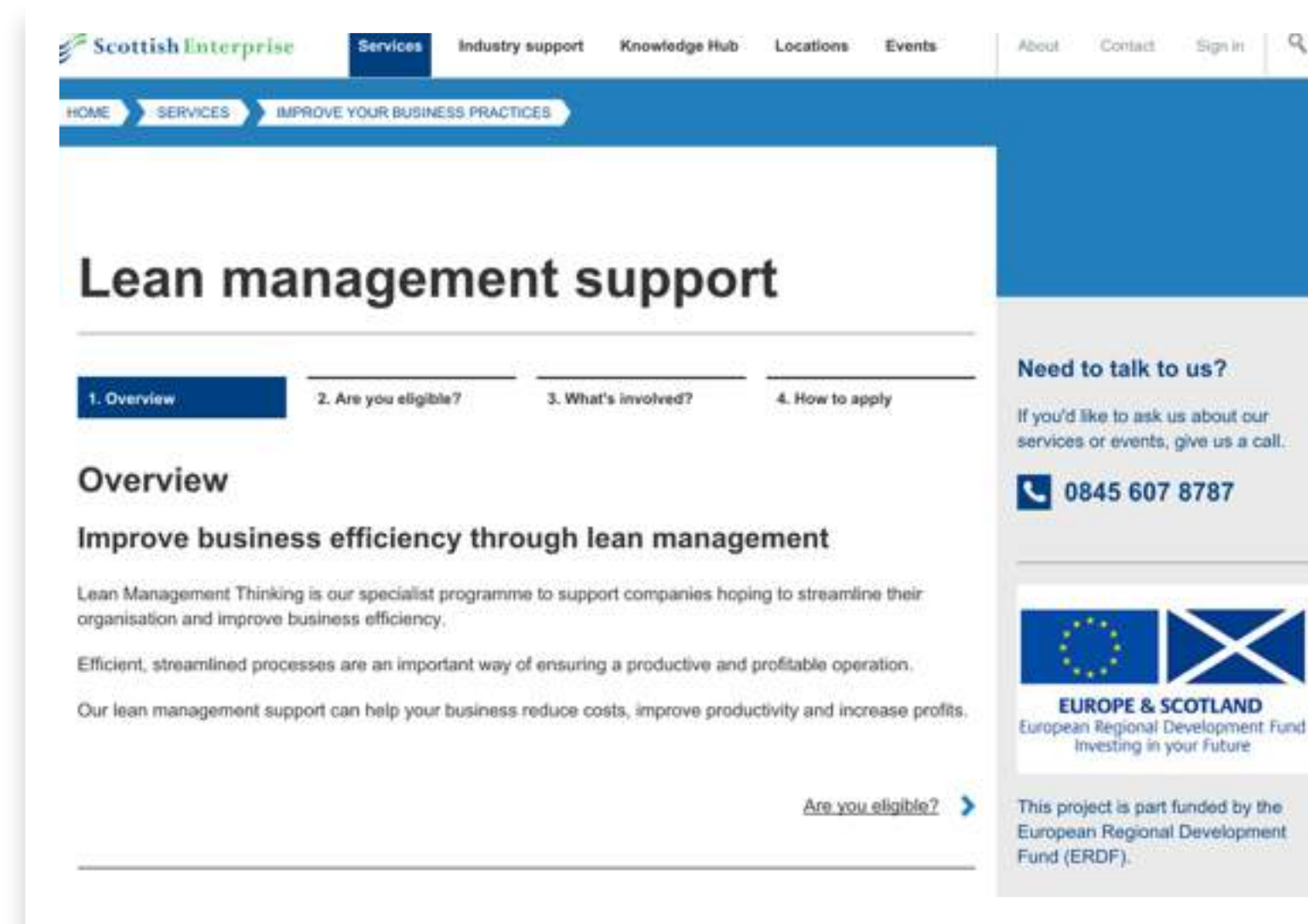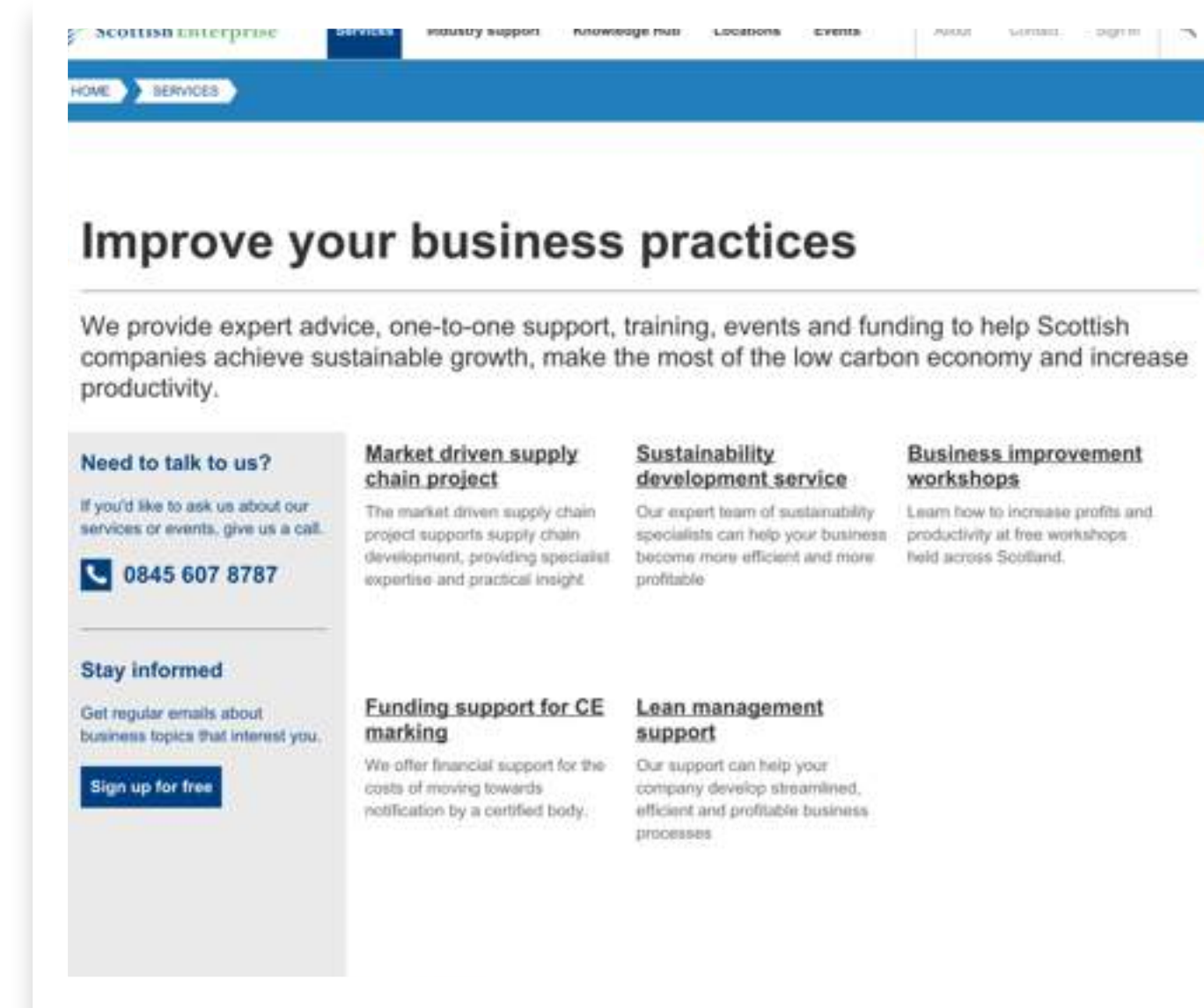
Participants didn't fit into industry categories

MEDIUM: When trying to determine what SE did participants felt that if they could find information in "Industry support" they could better understand what SE could do for them.

However, 10 out of the 12 participants felt they fell between two or more categories or there wasn't a category to apply to them. The two illustrators identified with the "Creative Industry" section, but the content in there states that the support from SE is for digital creatives.

Industries that were noted as missing were:

- Retail

- Consumer goods

- Education

RECOMMENDATION: Industries is a potentially useful filter but this study suggests that it is also alienating if users cannot find a category that applies to them.

Reviewing this is a larger piece of work and would require some strategic input from SE. In the short term it would be worth putting in a call to action for those who don't see their category and reiterating that SE don't restrict themselves to helping specific industries.

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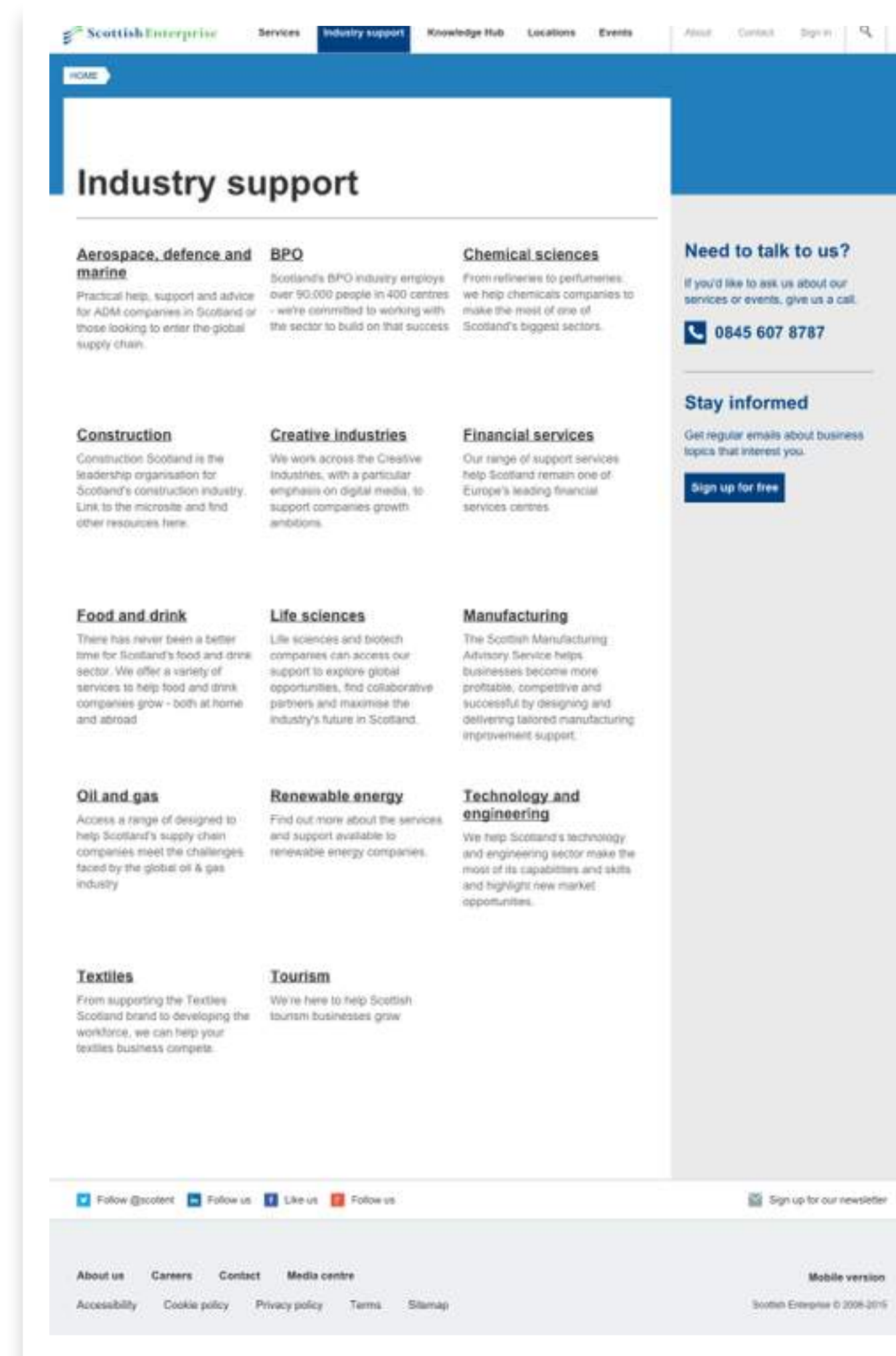
Industry pages not engaged with

OBSERVATION: The industry pages were not accessed much as participants found it hard to find a industry that their business fitted into (see previous page).

However, when participants did look at (for example participant 10 and 12 who were illustrators and so identified with category "Creative Industry") they did not engage much with the page. One of the illustrators commented that only a few services were shown here, which she found discouraging. She did note that she could link through to more services but wanted to feel that there were more specifically for her industry.

RECOMMENDATION: We do not feel that we can draw a conclusion from this study about how well the industry pages were used. However, we feel that this style of page would work well in the "Services" section (see p37).

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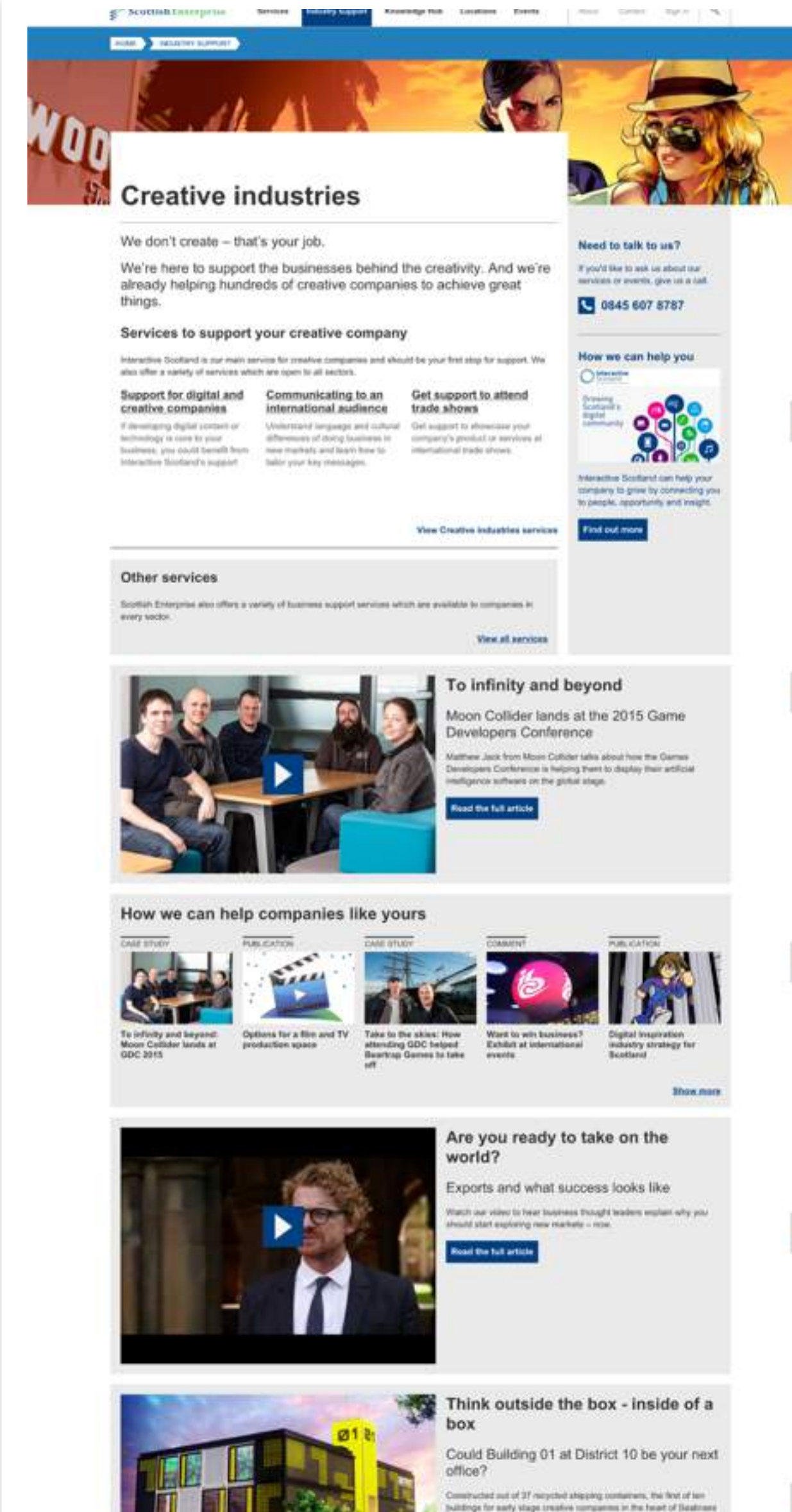
Trade shows support liked

GOOD: Some of the participants noted the trade show support within the "Services" section or in a case study. This was something that they were interested in and would find useful.

One participant talked about how she would like information on what trade shows were on and which ones were better to attend. She had experience of some in the UK and knew from her network which one to go to. However, for shows abroad she would not have the same knowledge and would find that useful.

RECOMMENDATION: Review the content on trade shows. The feedback from this research suggests that it is worth providing more general content about what trade shows there are and the value in attending them.

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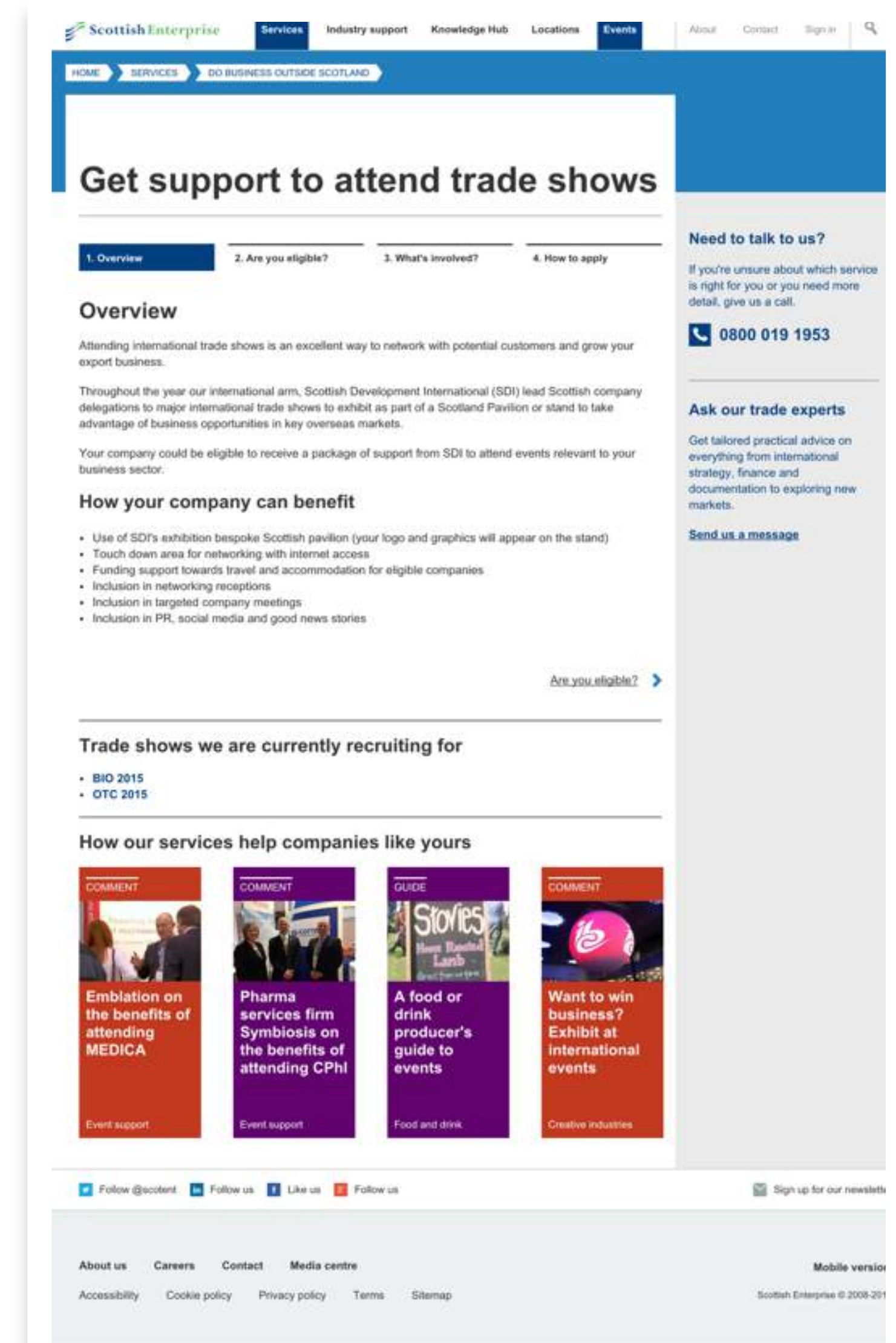
Videos expected to play straight away

OBSERVATION: The large play icon on the picture lead some participants to think that the video would start playing as soon as they clicked on it. They were surprised that the video was a supporting aspect to the article rather than the core content.

We had mixed feedback from participants about if they would watch video content and this is something that it is difficult to determine through user testing sessions.

RECOMMENDATION: We do not feel we can draw a conclusive recommendation from the user testing. However, we feel this finding should be borne in mind and explored in other user research sessions or when reviewing how often this content is clicked through to on the SE site.

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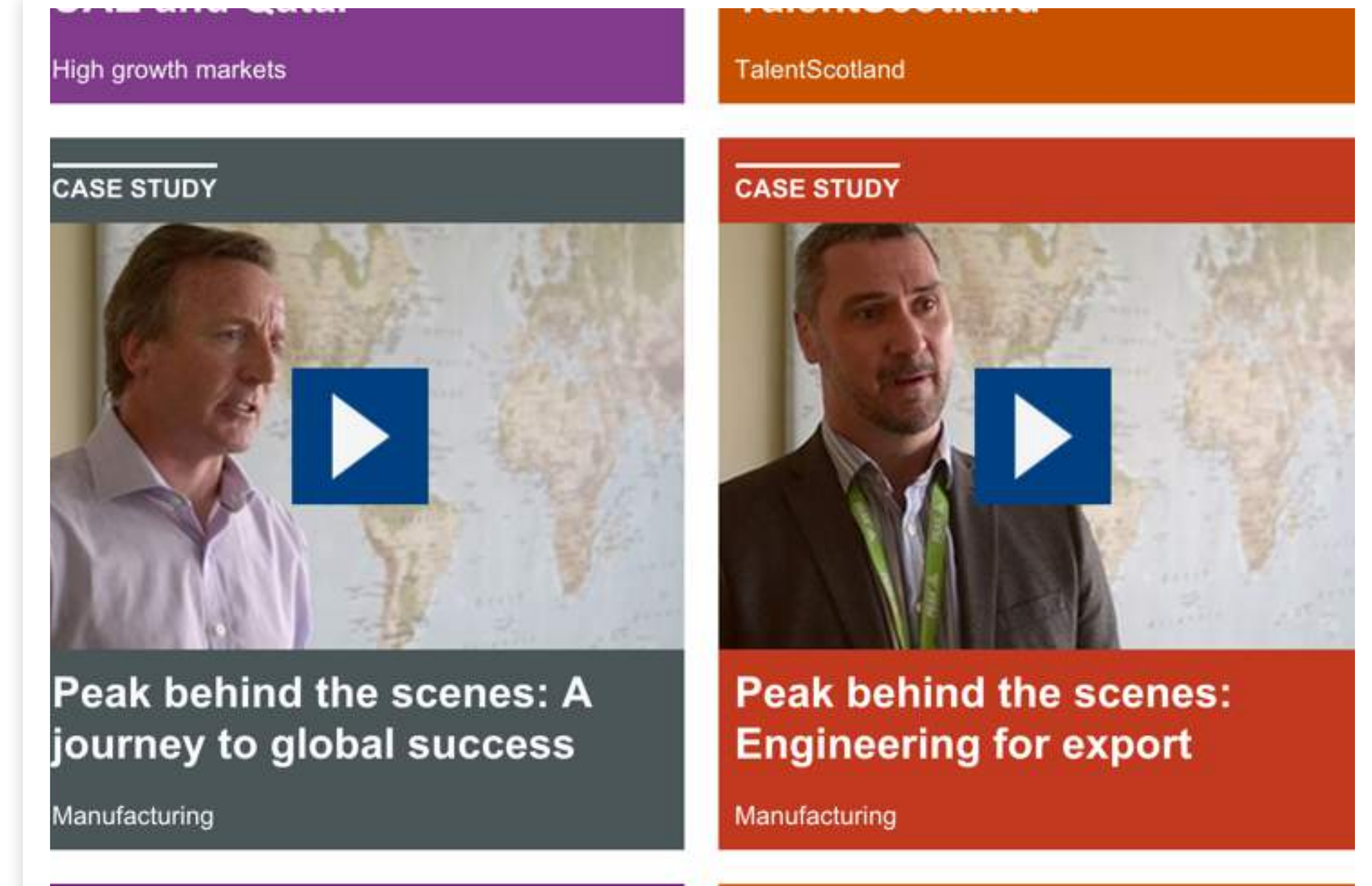
Case studies had a mixed reception

OBSERVATION: The interest in case studies depended on the participant.

Those who were closer to the "convinced" persona were not interested in other people's experience unless they were very closely related to their industry and business size. They assumed they would not be and would therefore not look at this content.

Those who were closer to the "confused" persona were more open to reading case studies. They felt that if the case study reflected a business of a similar size or who is trying to achieve similar business goals (e.g. move into new markets) they would get value from the study.

For those who are interested in case studies they wanted to see the practical advice on how objectives were achieved or changes made. General success stories were not of much use to them.

RECOMMENDATION: Ensure that case studies pull out practical advice from each story.

Scottish Enterprise

Innovation takes rare whisky bottles further round the world

CASE STUDY
Published:
23 March 2015

Gregor Hannah, director of Hannah Whisky, has found the perfect blend of rare and aged products with cutting-edge innovation that will take him into new overseas markets.

LADY GLEN

Participant 10

Participant 7

" I think it is healthy to have an interest in things that aren't directly related to what I do."

"The usefulness of case studies depends on how closely they match our business market"

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"Your guide to…" page liked

GOOD: Generally participants liked the second level pages in "Infinite Possibilities". The content is positioned better than on the SE site and participants felt that it was more helpful to have a smaller range of curated content rather than having a wider range of content that they had to search extensively through without such a clear journey.

The rotating events carousel was not liked. It was likened to an advert and felt to be annoying and they would ignore it.

The events did not show the times they were running and if they were a full day workshop or for a couple of hours in the evening.

Once the participants clicked on content at this point they were taken to a content page on the main SE site and lost the clear journey that they were on.

RECOMMENDATION: The success of this user journey is a strong argument for developing a similar approach on the main SE website. However, if this is taken forward SE needs to consider the end to end journey as after this page on "Infinite Possibilities" the context is lost and there is not natural onward journey on the site.
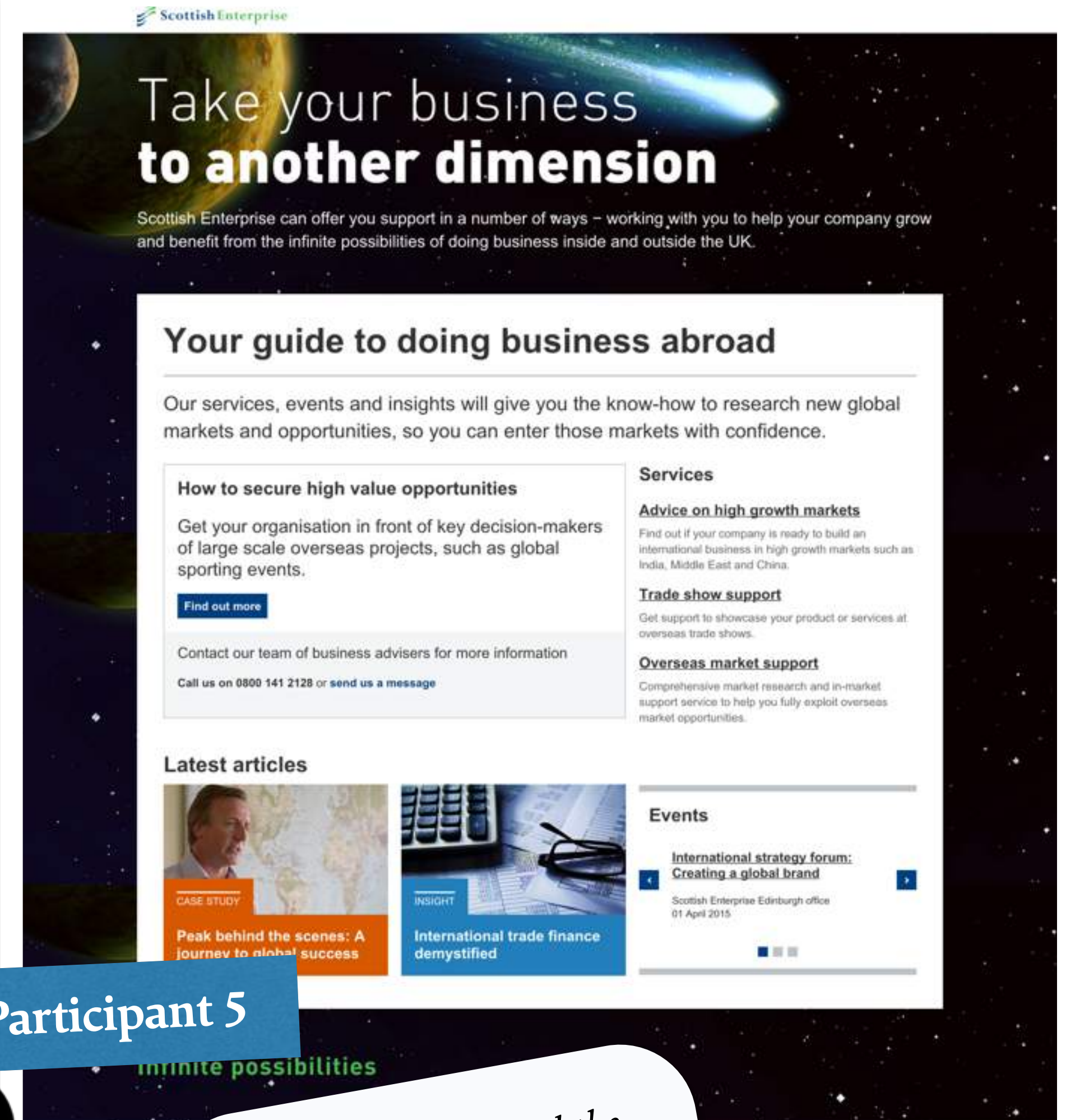
Participant 5

"Seems I would find the answer quicker as they have refined the options for me"

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2. Functionality

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Filters missed in the "Knowledge Hub"

HIGH: When scanning the "Knowledge Hub" content participants naturally wanted to filter to content that was relevant to them - generally by industry type or what they are trying to achieve with their business. When scanning through the list they pointed out what wasn't relevant to them and what they wanted to dismiss.

The filter was missed by most because it is subtle and the content page is so long it encourages scrolling which means the filter is missed at the top.

When the participants discovered the filter or were directed to it they found it useful. However there were some issues with it:

- It was not clear that there were options under the three headings - it looked like there were just three broad filters.

- In some cases participants were unsure if the content had changed if the top items remained the same.

- Some participants commented they would find it clearer if the filters were on the left hand side as they were used to on retail sites (like John Lewis).

RECOMMENDATION: See overleaf for recommendation.
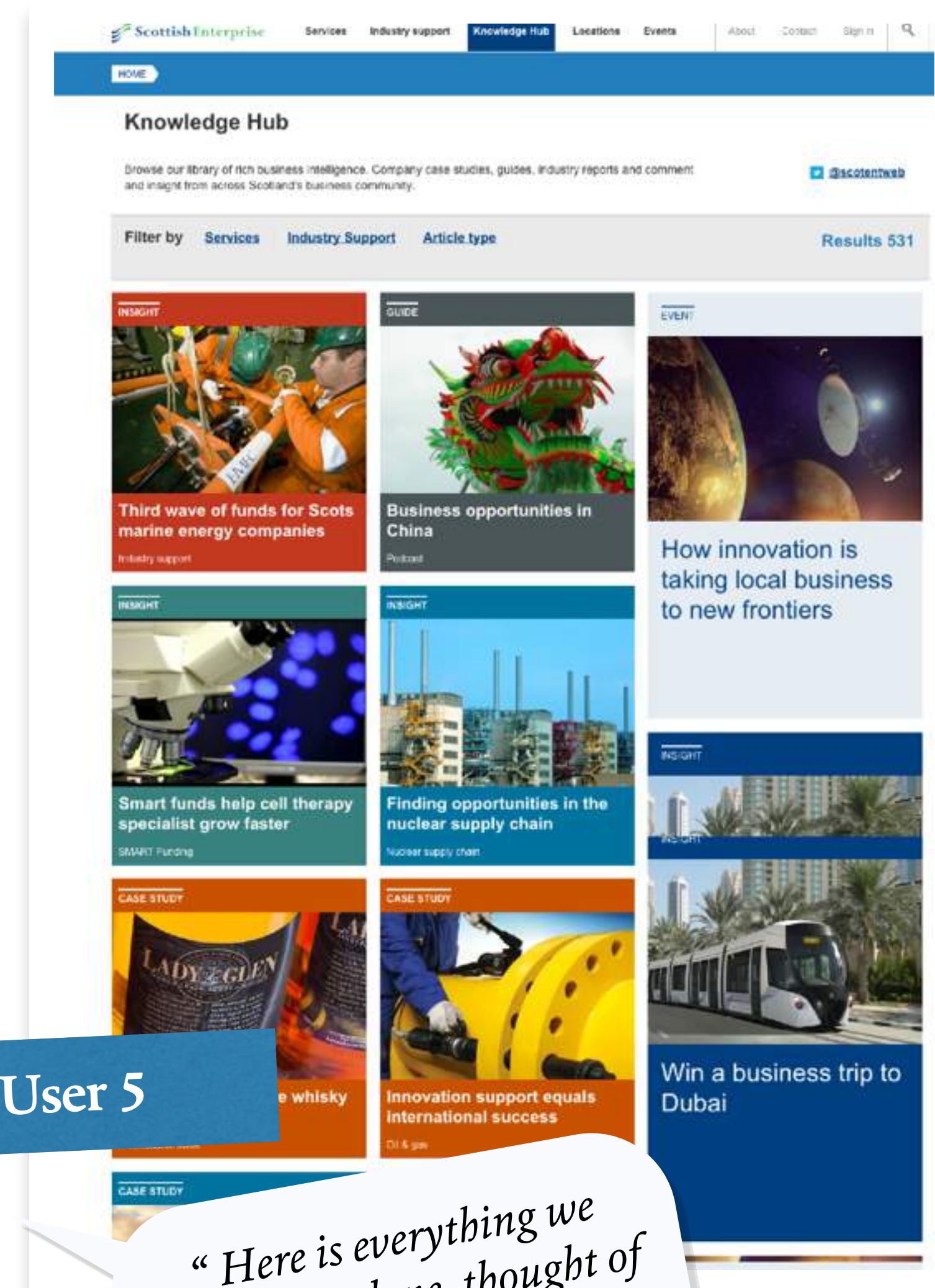
User 5

" Here is everything we have every done, thought of or might do"

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Search box not visible

MEDIUM: The search box is not visible on the page but was accessed by clicking a magnifying glass icon at the top right of the page. However, this was overlooked and participants who wanted to search had to be directed to it or took a while to find it. This is an issue we have seen across other sites we have run user testing on.

During the testing sessions the search didn't always work due to technical issues and results weren't returned.

RECOMMENDATION: Place the search box visible in the header area, rather than behind a link.

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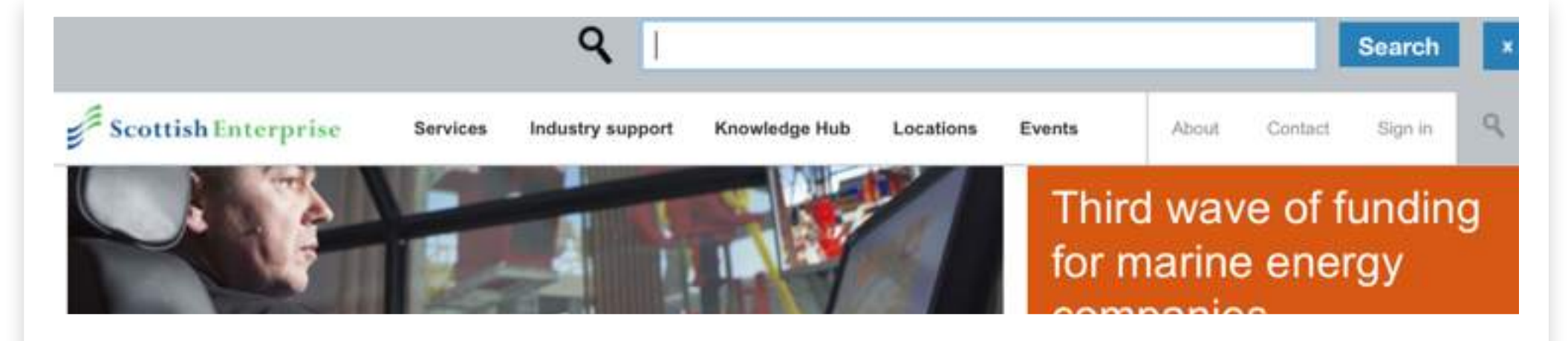
Not clear how to register

When asked to create an account on the SE site, participants found the "Sign in" link at the top of the page easily.

However, when they got into that page the journey became more confused.

- There was no link to register adjacent to the form field, as participants expected.

- The text explaining My Business ID distracted and confused the participants (see also overleaf).

- Participants were hesitant to put in their email address as they were not sure that it would lead to a registration process. However, some noticed the heading was Login or Register and assumed this must be a case.

RECOMMENDATION: Simplify this page. Remove the explanation about My Business ID. Consider moving to the layout that participants expected and have a call to action to register next to the login form.

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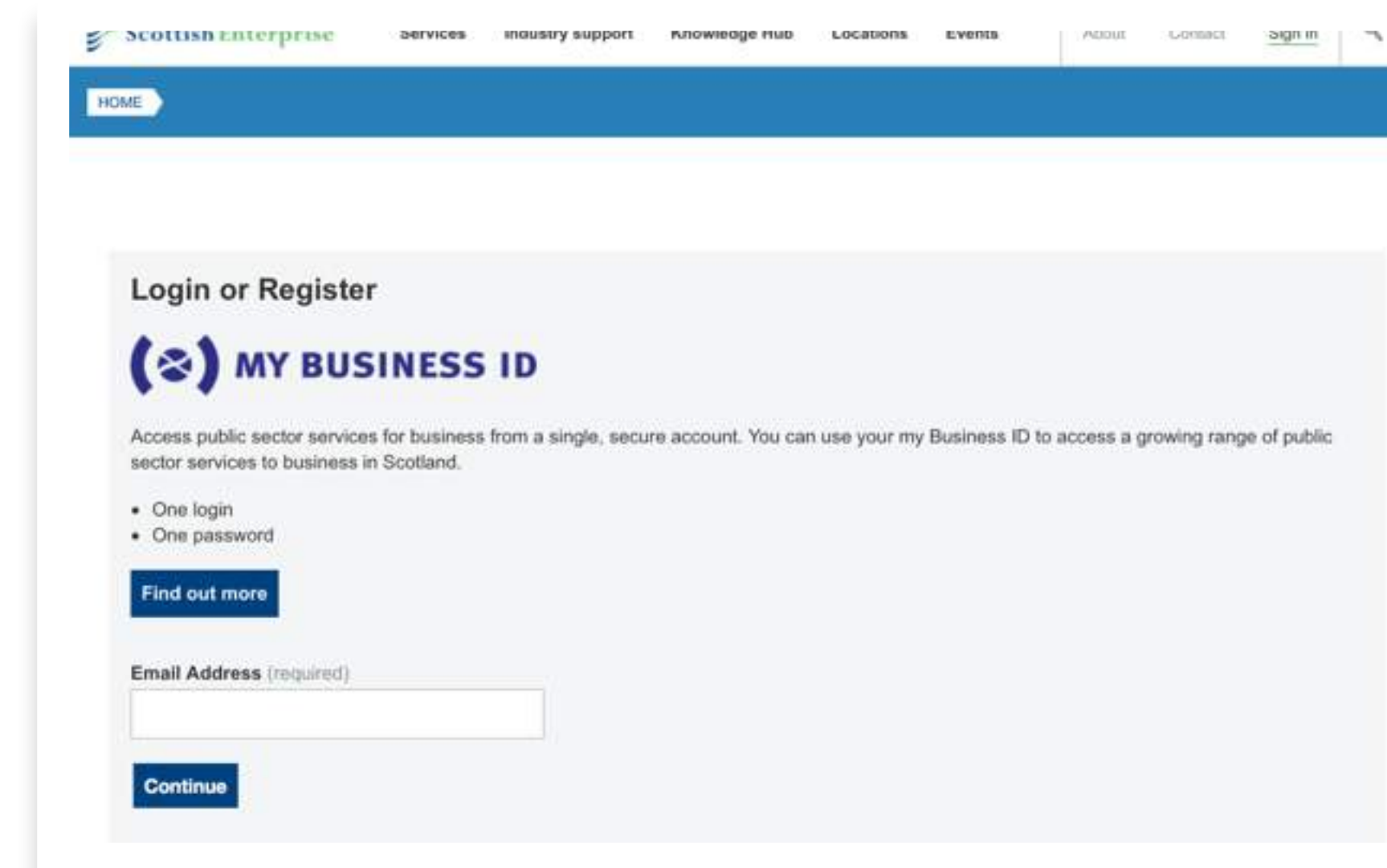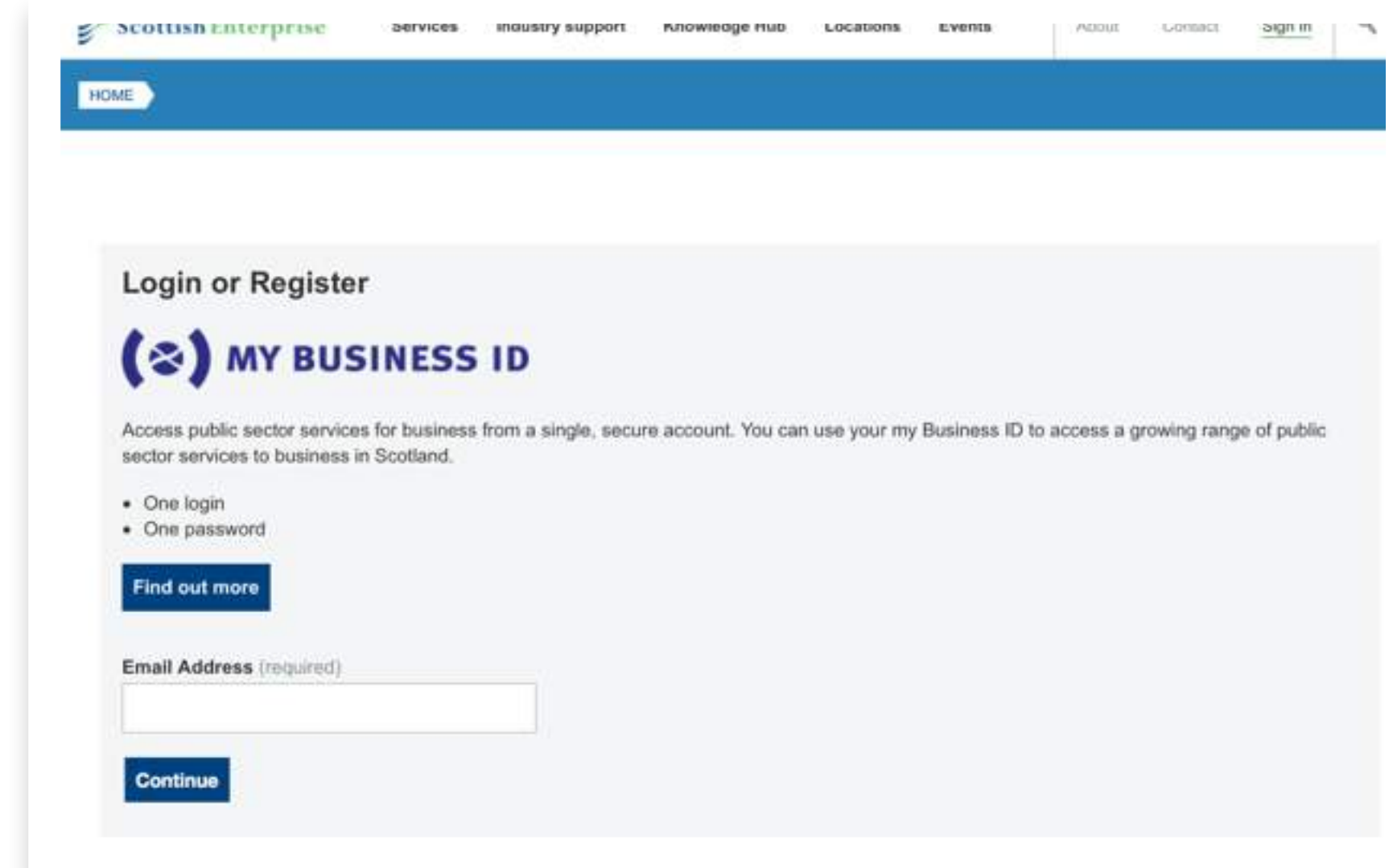
My Business ID explanation unclear

MEDIUM: A few of the test participants thought that "My Business ID" was something that they already had. They were confusing it with their Government Gateway login. Generally the name is very "official" sounding and generic. If there is value in having a log in for multiple sites we would recommend that a stronger brand is created.

As an observation - it is unclear what value there is for users having a My Business ID on the SE site. The only value was the email choices, but there is a separate sign up for the newsletter on the site already.

RECOMMENDATION: Look at the branding of the "My Business ID". Currently there is no obvious value for the user having an account on the SE site and we would question the value of having it on the site.

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Signing in with LinkedIn needs more reassurance

MEDIUM: When we asked participants about signing in on the SDI site with LinkedIn they were theoretically up for it as an easy way to access their account on the site. However, they were concerned generally about what information it would access and if it would post on their timeline that they had been on SDI.

When we went in to to look at it with some of the participants they weren't reassured by the content that was there. The login page states that SDI is going to access some of their LinkedIn info - name, photo, headline and current position. On top of this there is not reassurance that it will not post information on LinkedIn. After seeing this participants didn't feel confident about this process and would just create their own login.

RECOMMENDATION: We understand that the wording on this page is dictated by LinkedIn. In light of these findings we would recommend that SE pass this feedback on and suggest that the wording is adjusted to offer some reassurance that there will be no activity on the user's LinkedIn account - such as posting activity or contacting their connections.

Scottish Development International would like to access some of your LinkedIn info:

YOUR PROFILE OVERVIEW
Name, photo, headline, and current positions

YOUR EMAIL ADDRESS
The primary email address you use for your LinkedIn account

Sign in to LinkedIn and allow access:

Email
Password

Join LinkedIn
Forgot your password?

Allow access   Cancel   Linked **in**®

All Applications can be found in your settings
Terms of Service | Privacy Policy

Participant 12

" They don't need to access my profile - I'll share what I want to share. I think that's overkill"

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3. Design

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No clear user journey from the homepage

HIGH: Participants found the content tiles on the homepage of limited use in navigating deeper into the site.

- They did not notice the primary navigation at the top that would have taken them into the main sections.

- The tiles lead into specific content items which did not open out the rest of the content to the participants. When they clicked into a content item from the homepage they would have had to use the primary navigation or the breadcrumb to go anywhere besides back to the homepage and they didn't. We saw participants pogoing between the homepage and the content items trying to find some relevant content.

- The "core" content - "Services" - was not linked to from the homepage

This is a fundamental issue that some of the recommendations around the homepage content will help resolve, but we feel that the current site does not cater for a clear user journey and makes users work quite hard to find useful and relevant content. The reaction to the "Infinite Possibilities" section reinforces this point.

RECOMMENDATION: See p34.
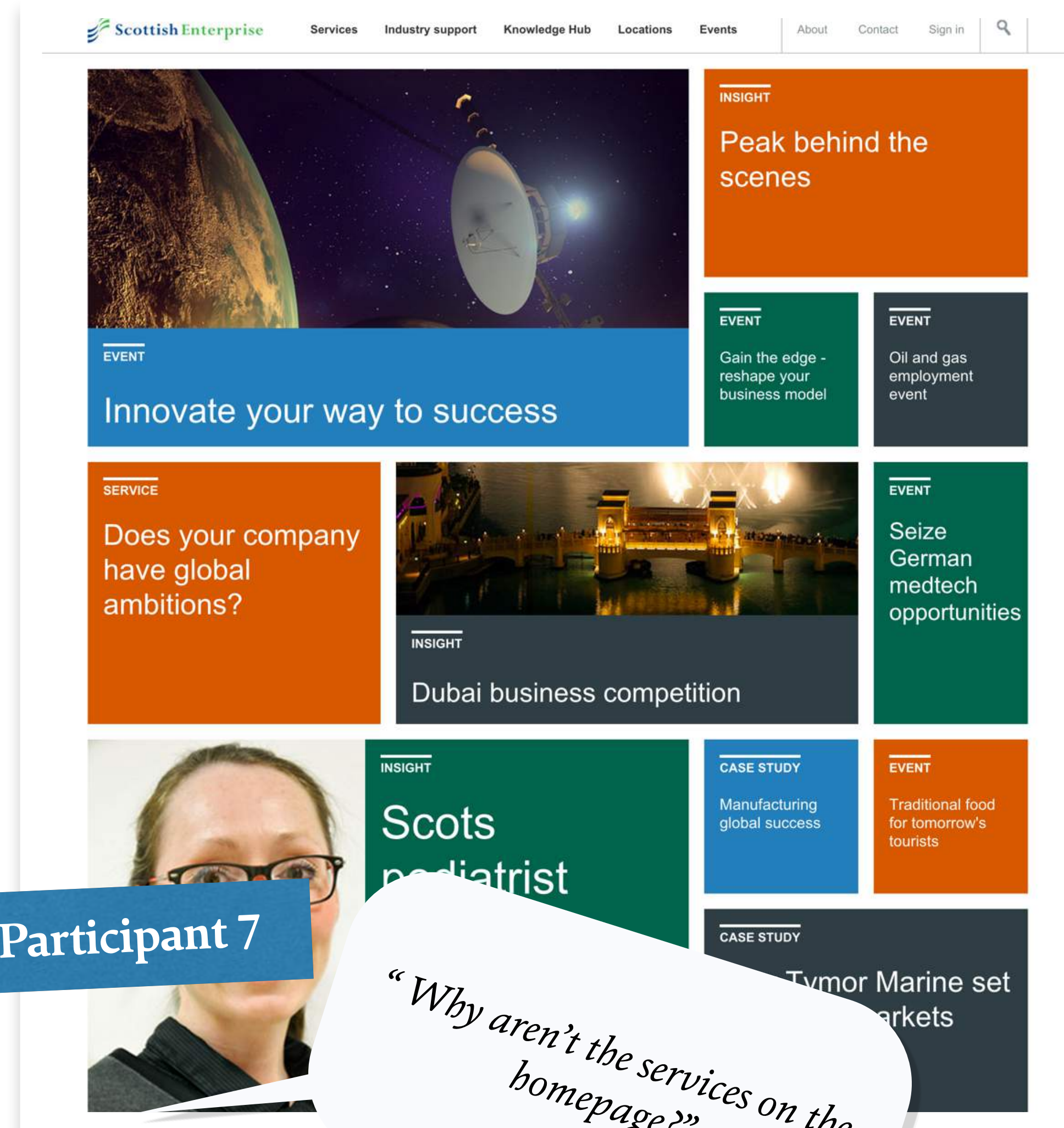
Participant 7

" Why aren't the services on the homepage?"

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"Infinite Possibilities" has a clear user journey

GOOD: After trying a few tasks on the SE site, we showed participants the "Infinite Possibilities" section.

The user journey in this section was much more clearly defined and participants contrasted it to their experience on the SE site:

- The landing page clearly communicated what SE did and was very welcoming.

- The participants felt that the three business need options on the landing page were clear and useful and they could pick one or more that applied to them.

- Once they got into the next section they got a range of content that supported the business need they had clicked into.

RECOMMENDATION: See overleaf.
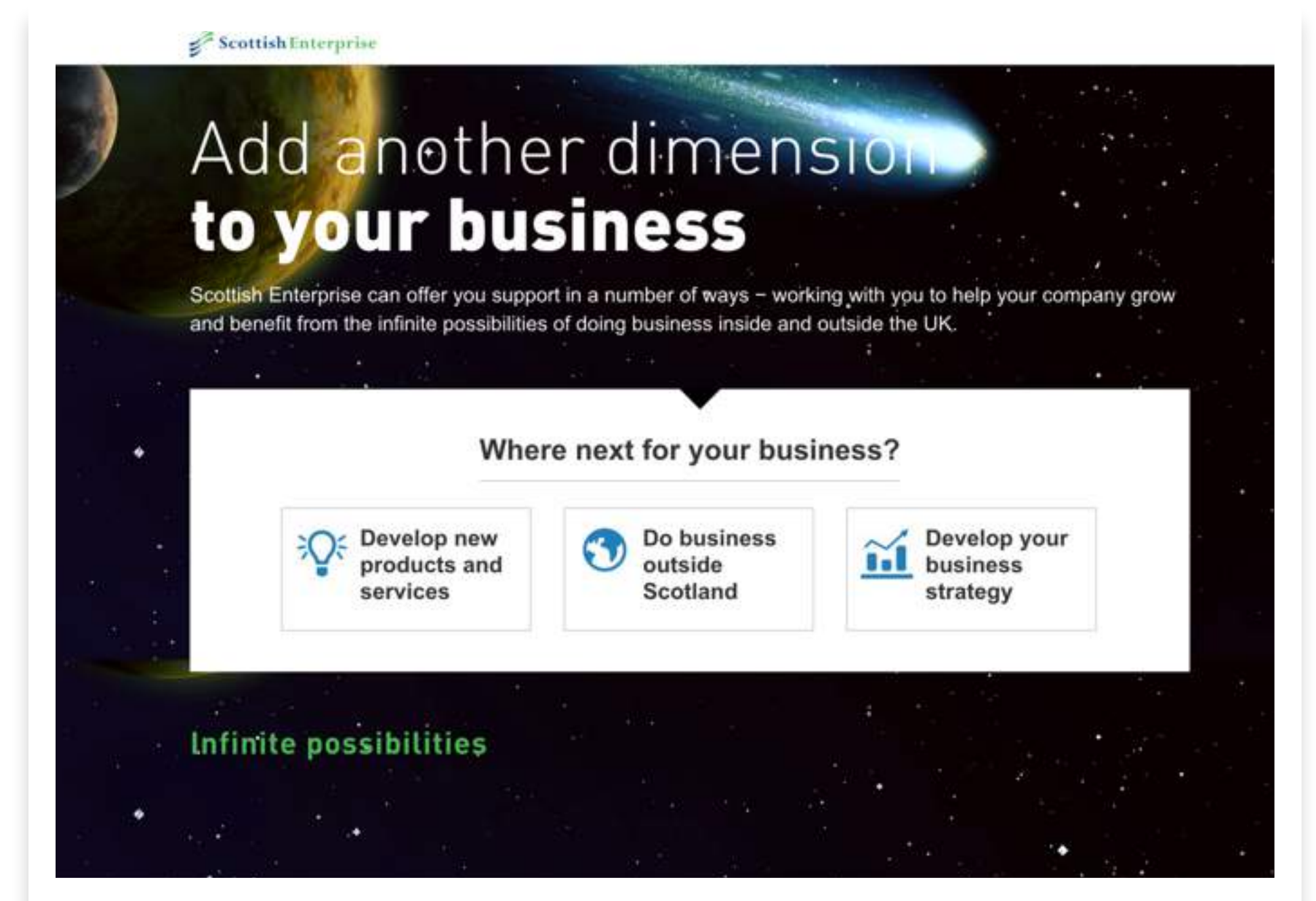
User 10

"I like that it says what Scottish Enterprise does"

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Homepage recommendations

RECOMMENDATION: The reaction to the user journey on the "Infinite Possibilities" site illustrates how fragmented the journey was on the SE site. SE need to explore what this means for the site overall. In terms of taking the homepage design forward SE needs to consider:

- It is not clear to users what SE does, so there needs to be the ability to communicate this on the homepage.

- The current panelled approach limits SE's ability to illustrate core content (services) vs support content (knowledge hub content). A hybrid approach would be worth considering where part of the page leads the users into the core site content and part showcases the range of articles.

- We recommend exploring how the business need user journey could fit into the wider site and what that means for users accessing the range of services that SE can provide.

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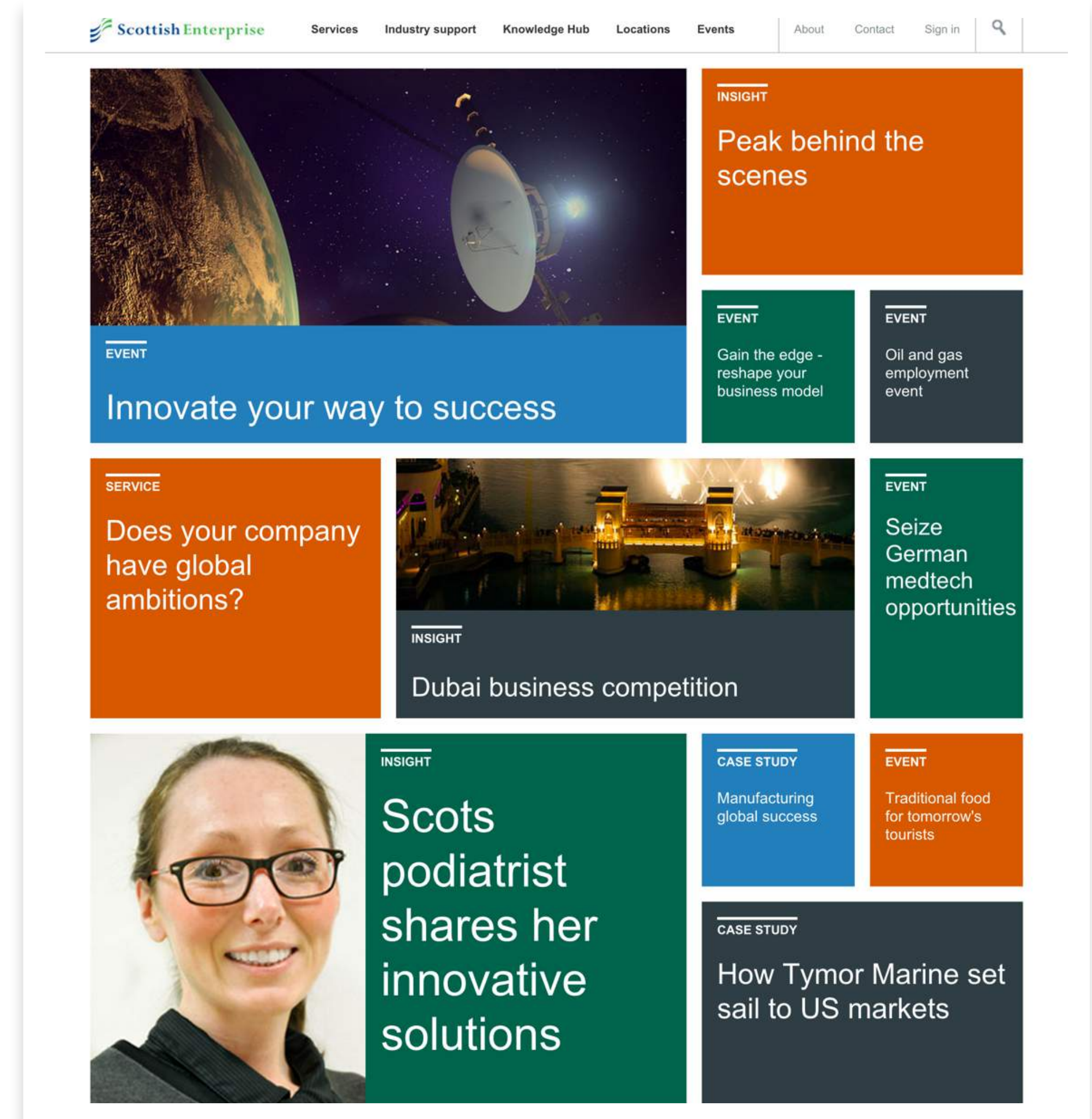
Homepage inspiration : Econsultancy

https://econsultancy.com

The Econsultancy homepage has a full page width row design that requires the user to scroll down to access different rows of content.

This design would work well for SE as you would have the ability to showcase a variety of content clearly - services, business needs, events, global reach.
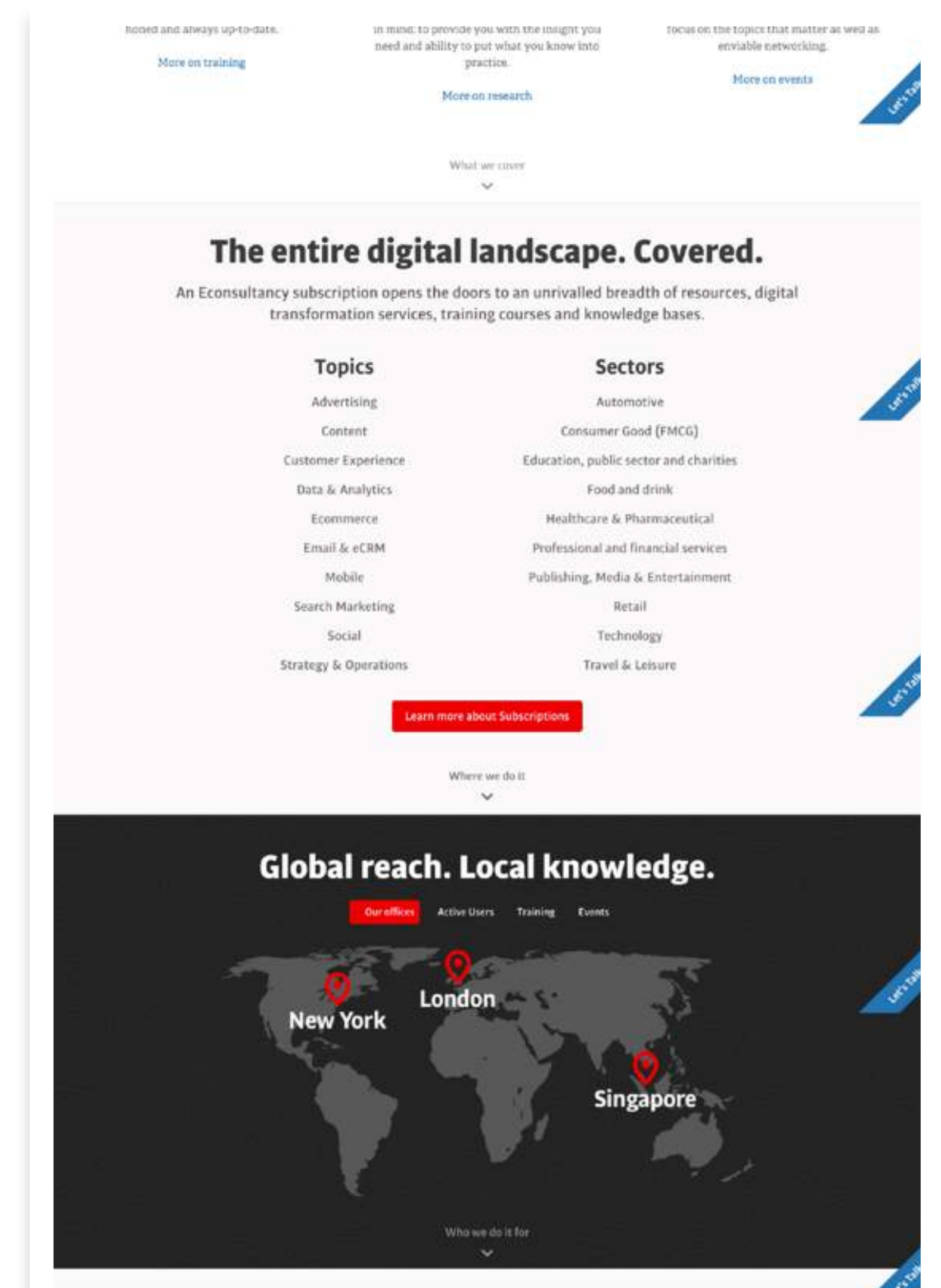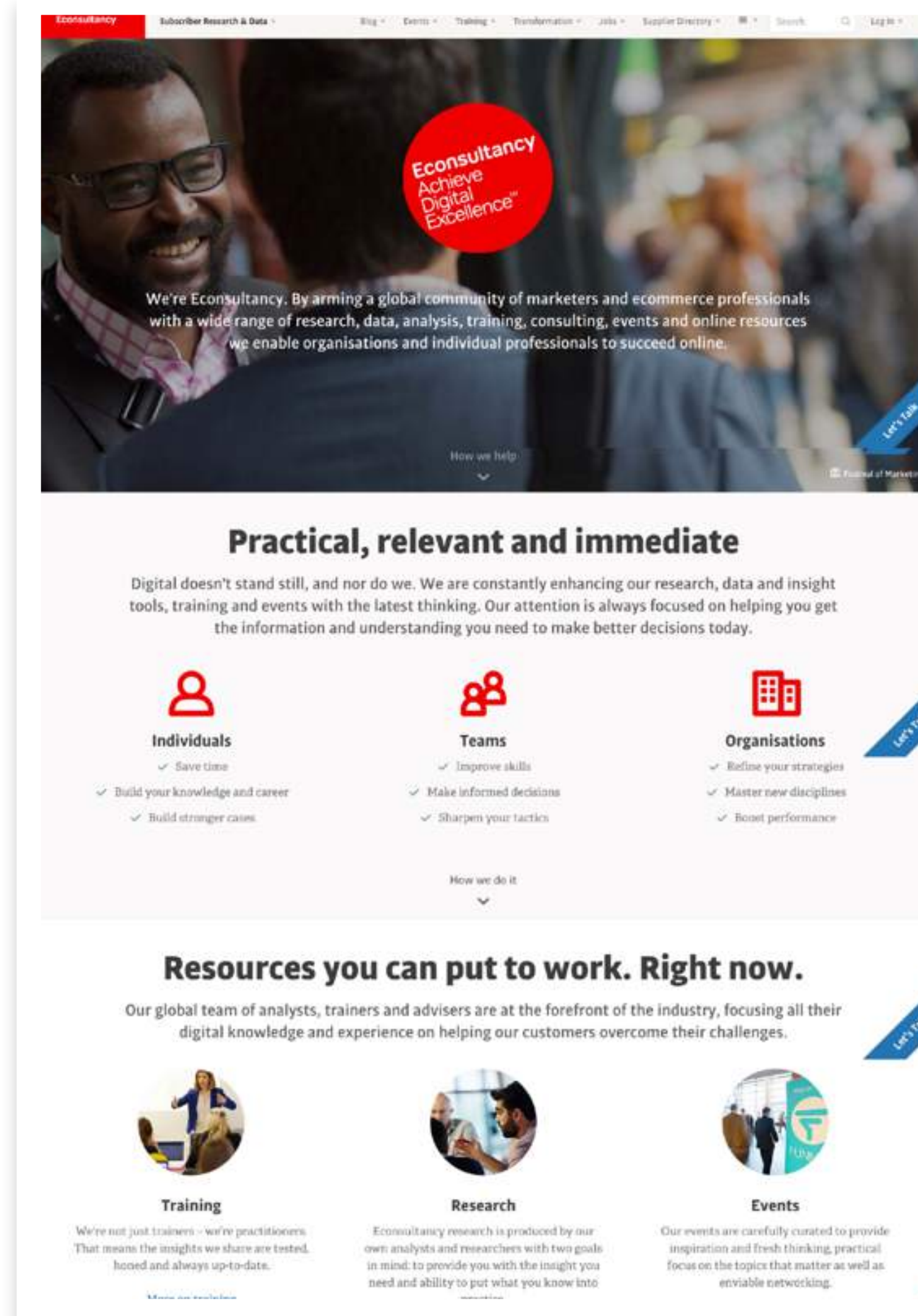
"Knowledge Hub" colours assumed to be a code

GOOD: The pictures in the content tiles on the "Knowledge Hub" were considered attractive and helpful. They supported the content well and helped direct participants to content relevant to them.

MEDIUM: The colours of the panel in the content area were assumed to be related to the types of content (e.g. all case studies are grey) or industry (e.g. all oil and gas are blue). However when they realised that this was not the case they were unclear what the colours were meant to signify.

RECOMMENDATION: There is a lot of content in the "Knowledge Centre" and giving users clues on how to digest this usefully is helpful. Consider colour coding this content by type, as that is what most participants assumed it was because of the content type tags on the panels.

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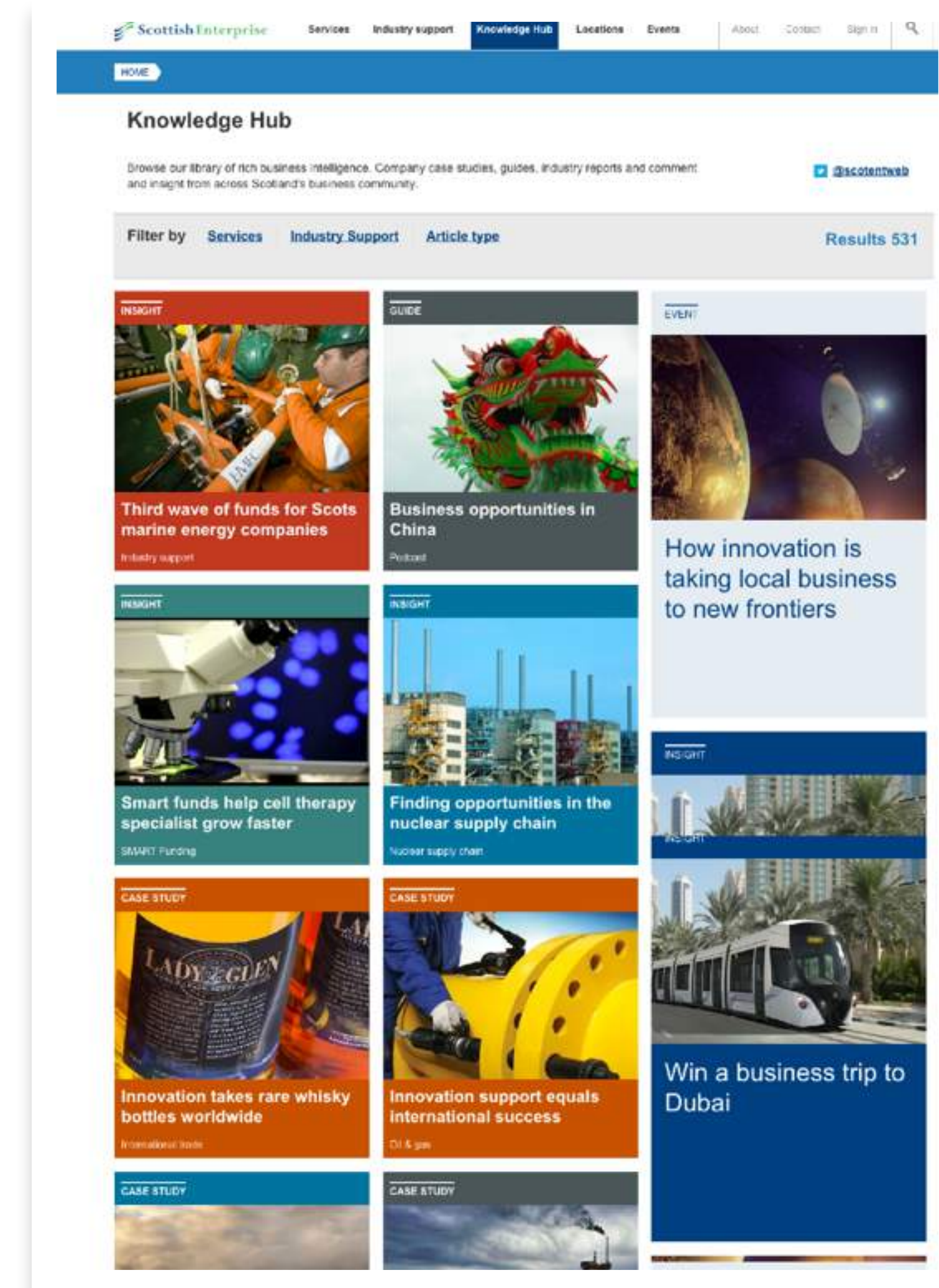
Design
"Services" and "Industry Support" text heavy

HIGH: The "Services" and "Industry Support" sections don't have any images or graphics on many of the pages and are text heavy.

There is no visible contextual navigation. The combination of this meant that participants ended up being confused about which section they were in, how they had got to the page they were on and what pages/sections they had already looked at.

RECOMMENDATION: The design of these sections needs to be looked at to improve the overall user journey and help users orientate themselves.

The "Services" section would benefit from looking at the design and information architecture in light of the popularity of the "Infinite Possibilities" business need navigation and the desire for guide content. The design that is used for the industry pages (see p20) and the second level "Your guide to.." pages in "Infinite Possibilities" provide curated content around a topic that would work better for "Services".

We think that SE would get great value in determining the direction of the "Services" section, and the user journey overall, by conducting co-design sessions with target users that would allow you to get quick feedback and direction. See Next Steps for more on this.

User 10
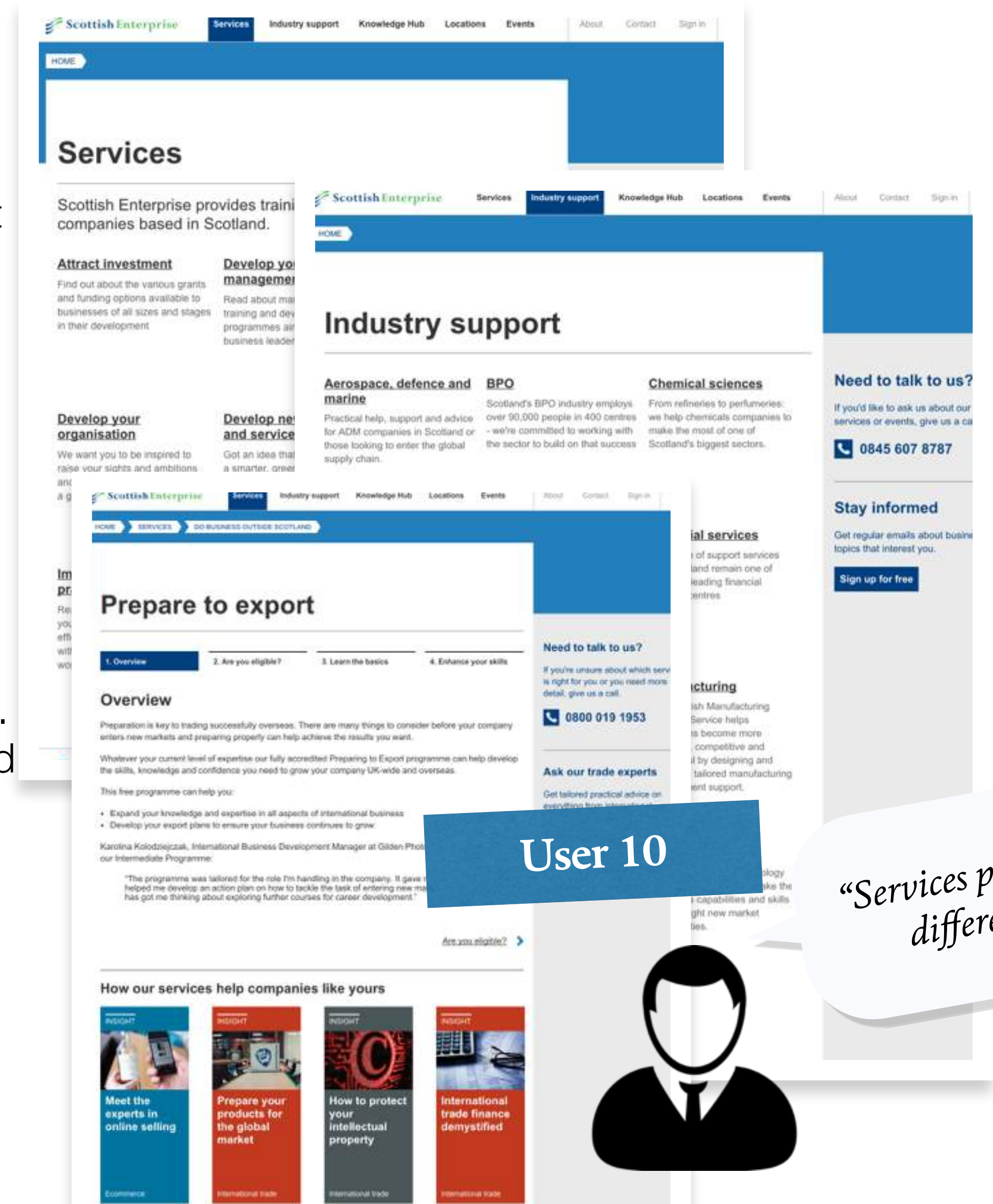
"Services page looks like a different website"

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Space analogy provoked mixed reactions

OBSERVATION: The space analogy in the "Infinite Possibilities" section provoked mixed reactions. Some participants liked the design, but some found it a bit "too much". Comments included:

- It looked it was aimed at children

- It seemed to be for engineering or science type businesses

- It brought "Brian Cox" to mind with connotations of trendy science programme
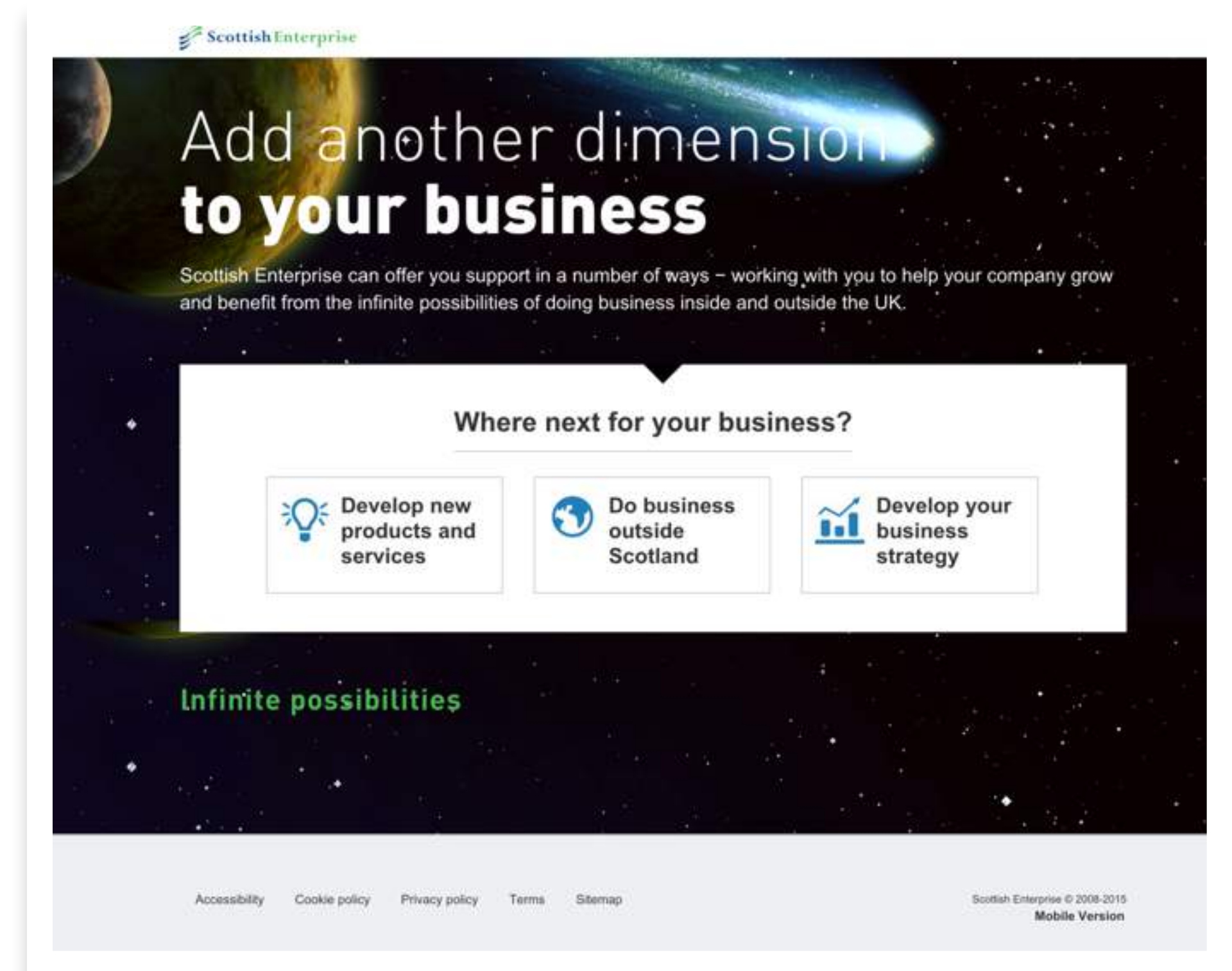
User 7

"Planets and space makes me think this is something for children"

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Contact Us

OBSERVATION: Some participants expressed an interest in more guidance around the ways in which to contact SE.

One participant wanted guidance on what to put in the contact form - size of business, turnover, goals etc. He felt that this would allow SE to respond in a more useful fashion to him.

Another participant wanted to see contact avenues specific to what they were enquiring about e.g. creative@scottishenterprise.com, funding@scottishenterprise.com. She would feel better about sending an email to a dedicated team, rather than a generic contact.

RECOMMENDATION: Consider the above ideas and if SE can implement them.

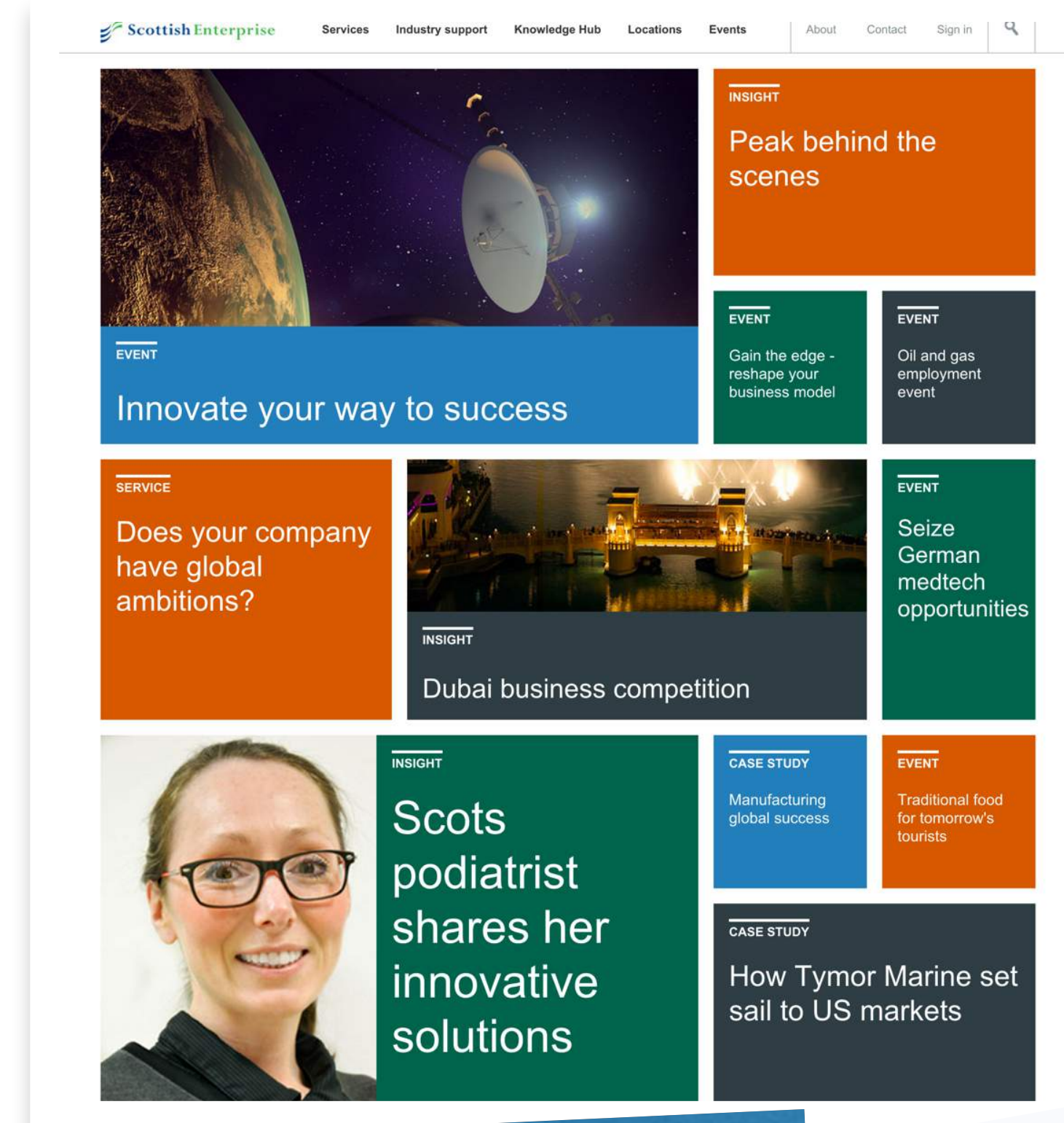*nile.*

Establishing where their business fits

OBSERVATION: Several participants wondered if their situation excluded them from assistance from SE.

• The site gave the impressions that it helped companies that wanted to trade outside Scotland so one participant was unsure if she would get help as she only traded domestically.

• One participant was senior in the company but not owner (although this is likely). Is there support for people who don't actually own the business yet?

• One participant was unsure of the meaning of SME. "How small is small?"

• Two businesses had been trading for 30+ years. The participants wondered if they were 'too established' for SE to consider helping them

RECOMMENDATIONS: The content needs to bear this issue in mind and ensure that the site conveys the breadth of businesses that SE offers assistance to.

User 4

"Am I too established for help?"

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Prioritisation of issues

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Solutions workshop

In the solutions workshop on Thursday 26th March, Nile stepped through the initial findings from the user testing with eight members of the SE team. The issues were discussed in detail and initial impressions and solutions discussed.

To help SE take the findings from this study forward the issues identified were prioritised by the SE team. Each team member indicated:

- Three "quick win" issues that could be resolved quickly with little effort and which would have a positive impact on the site

- Three "significant effort" issues that are a more fundamental change and would require strategic and design

This section shows the results from this exercise.

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Quick Fix 1: Filter visibility

Improving the visibility of the existing filter was felt to be a fix that could be easily improved and would make a large impact on the user experience of this section.
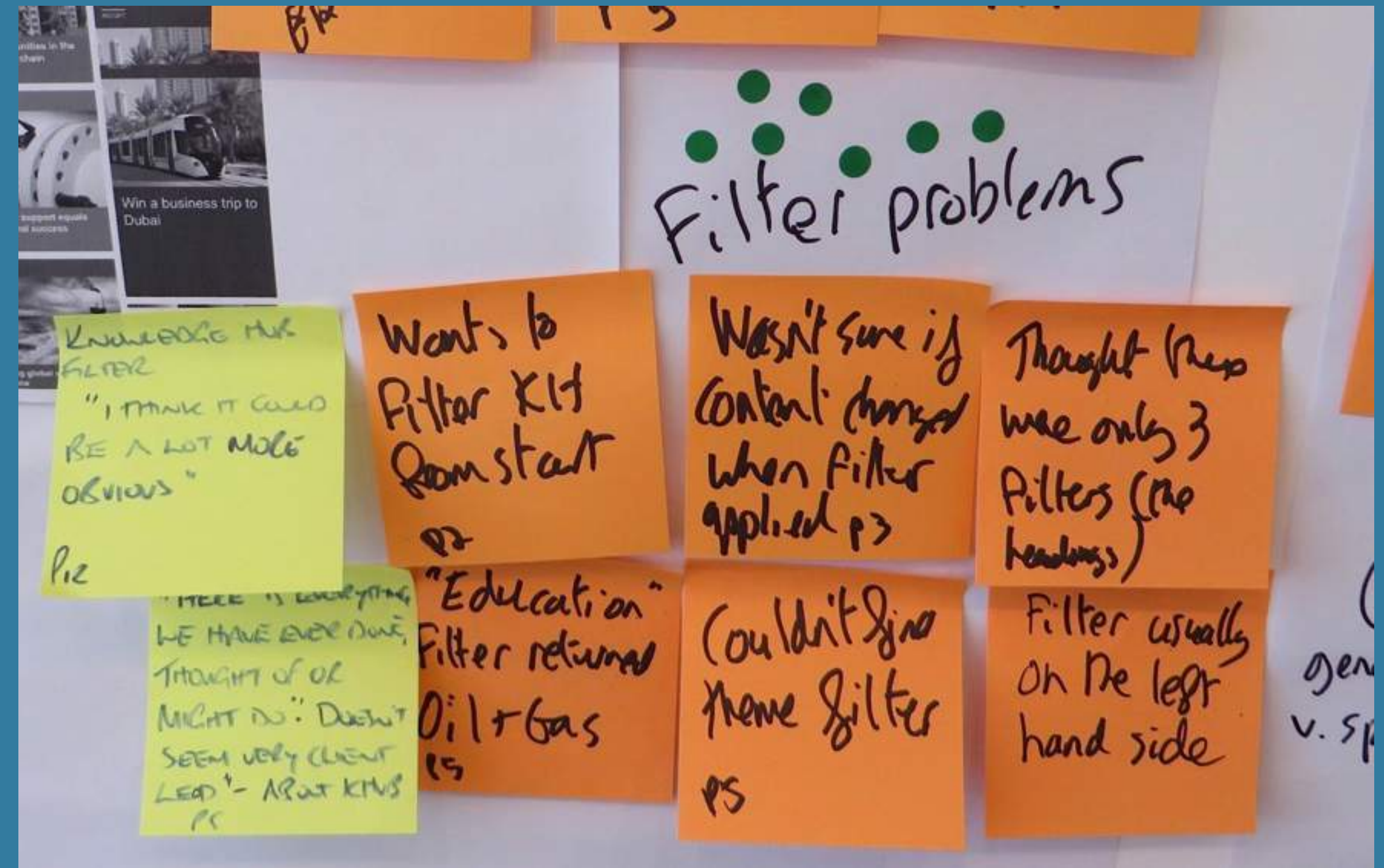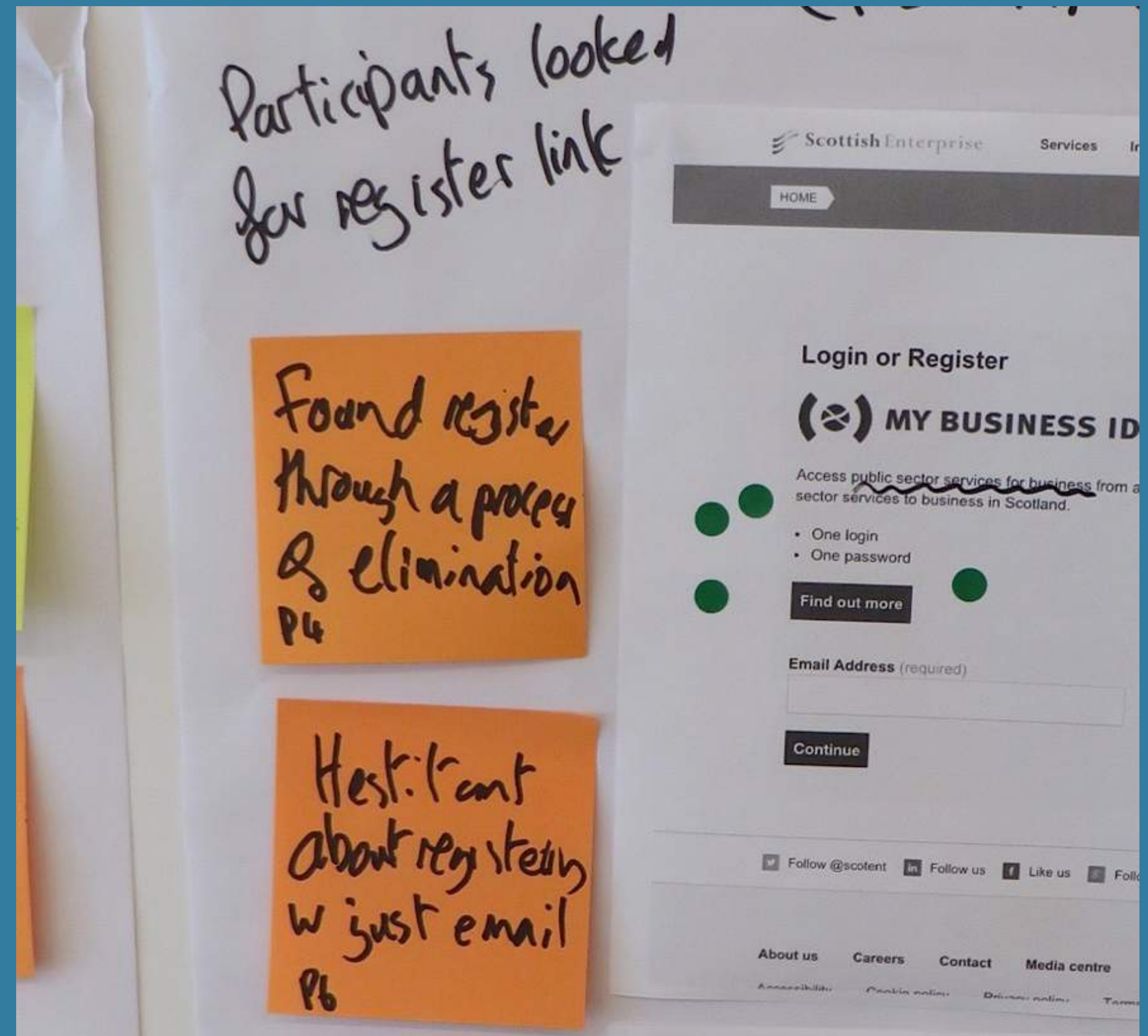
Quick Fix 2: Search visibility

Make the search visible in the header area, rather than having it accessed via a button with a magnifying glass icon.

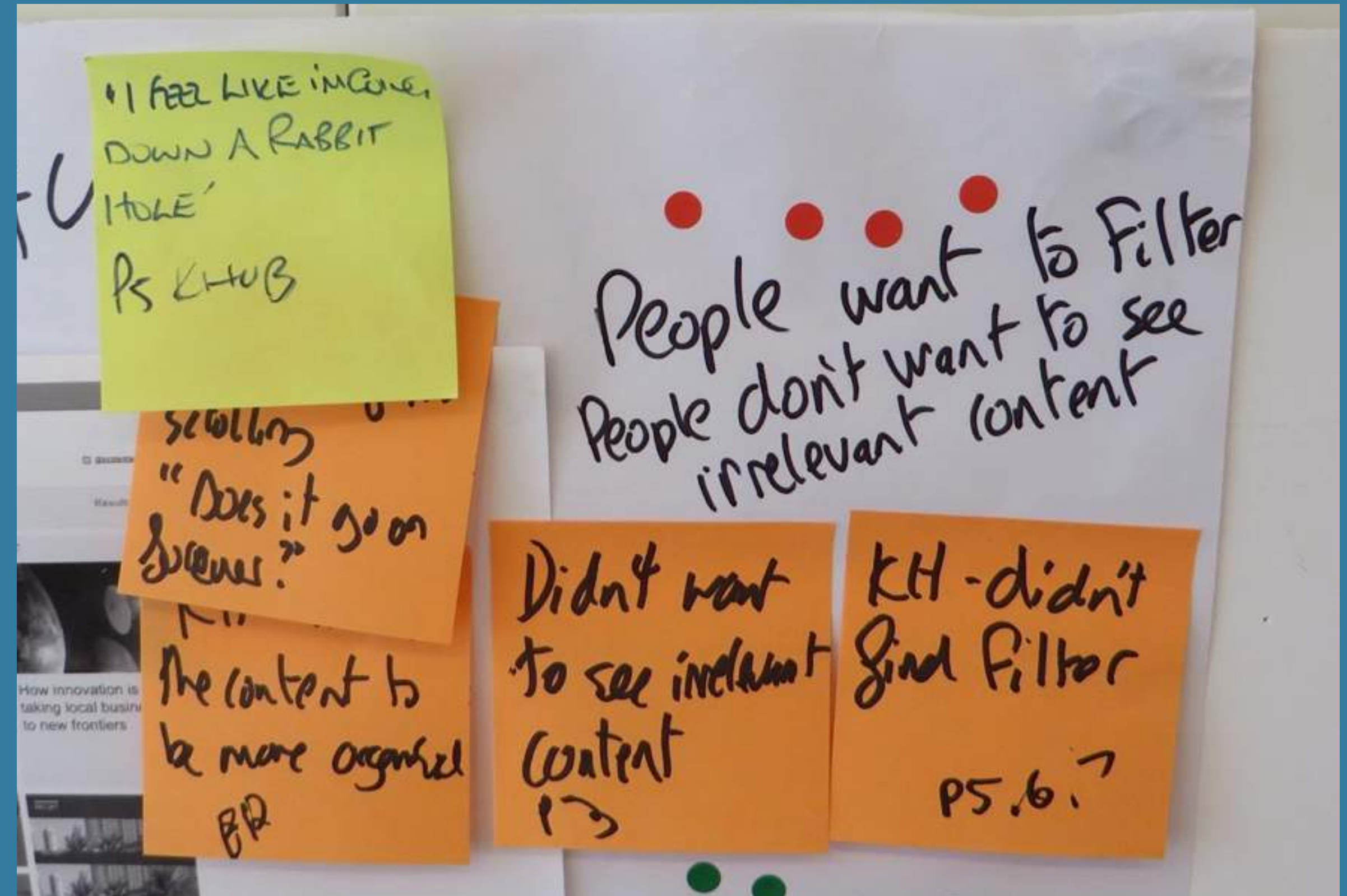*nile.*
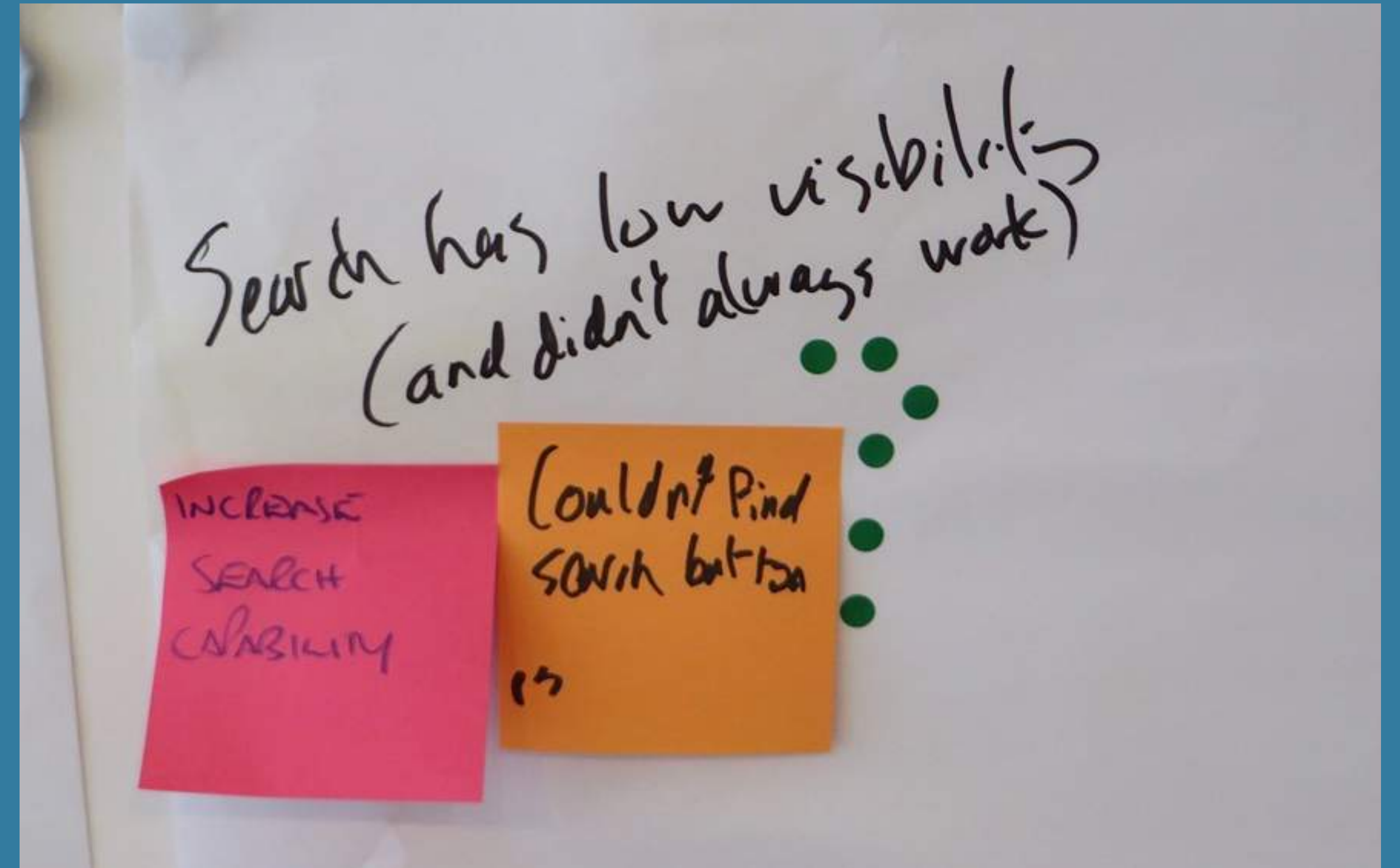
Quick Fix 3: Register call to action

Simplify the login page so that the explanation around My Business ID does not distract from the sign in/register field.

Include a separate call to action for registration.

Significant Effort 1: KH needs to deliver

The "Knowledge Hub" will work more effectively for users when the filtering is more robust and obvious.

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Significant Effort 2: No clear user journey

This is a significant issue that needs a lot of strategic work from SE to resolve. It impacts design, content and information architecture. We think that a dynamic way to look at this would be by involving your target users in the design process and running some co-design sessions where the issues are looked at and SE and the users come up with solutions together. We have outlined how this could work on p51.

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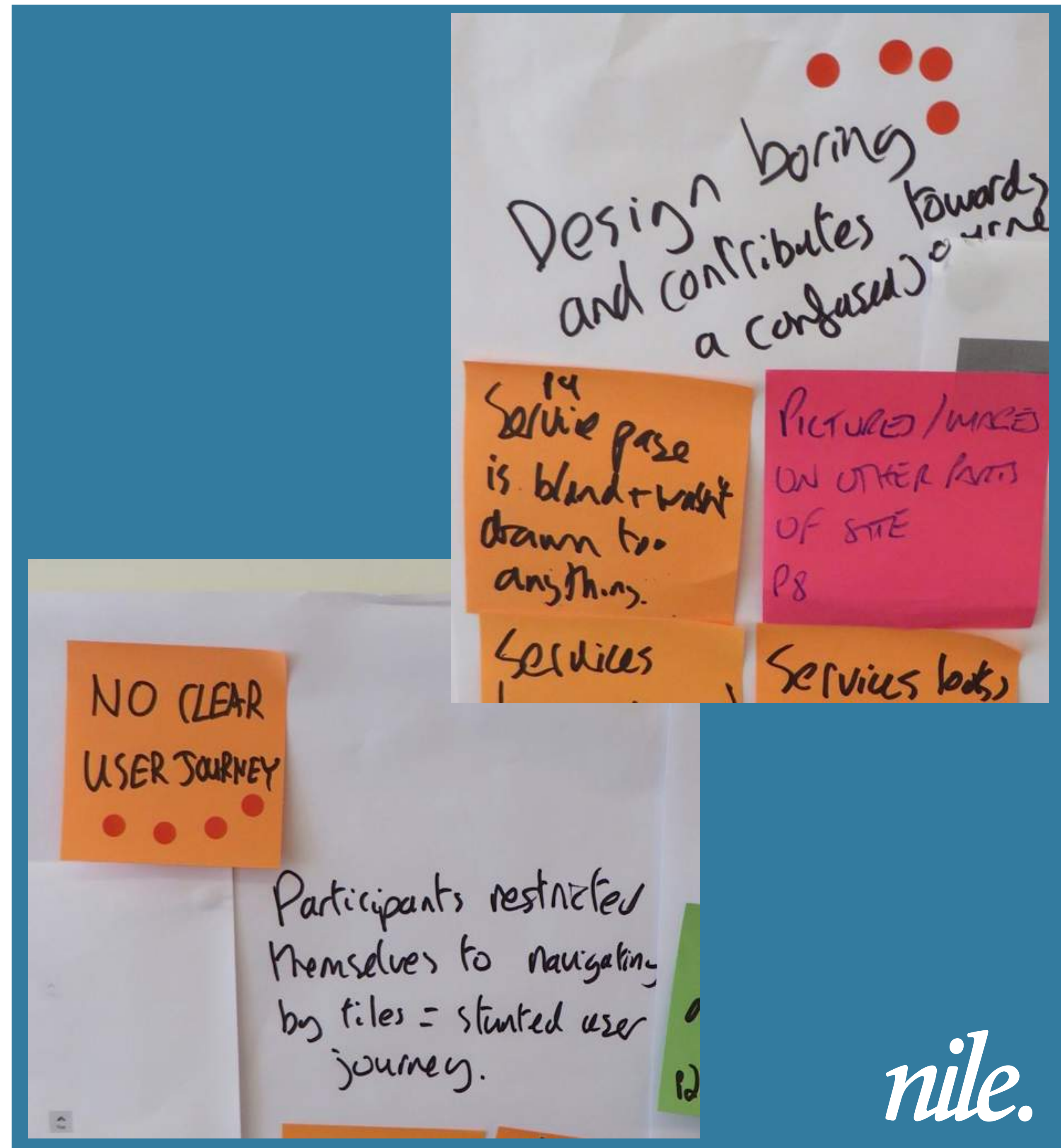
Significant Effort 3: Industry categorisation

- This is an historic issue with the site and one that we have seen across other industries as well. Businesses identify heavily with the industry so this is potentially useful but in its current form was of limited use. This area would need significant IA work and strategic input from SE to be improved.

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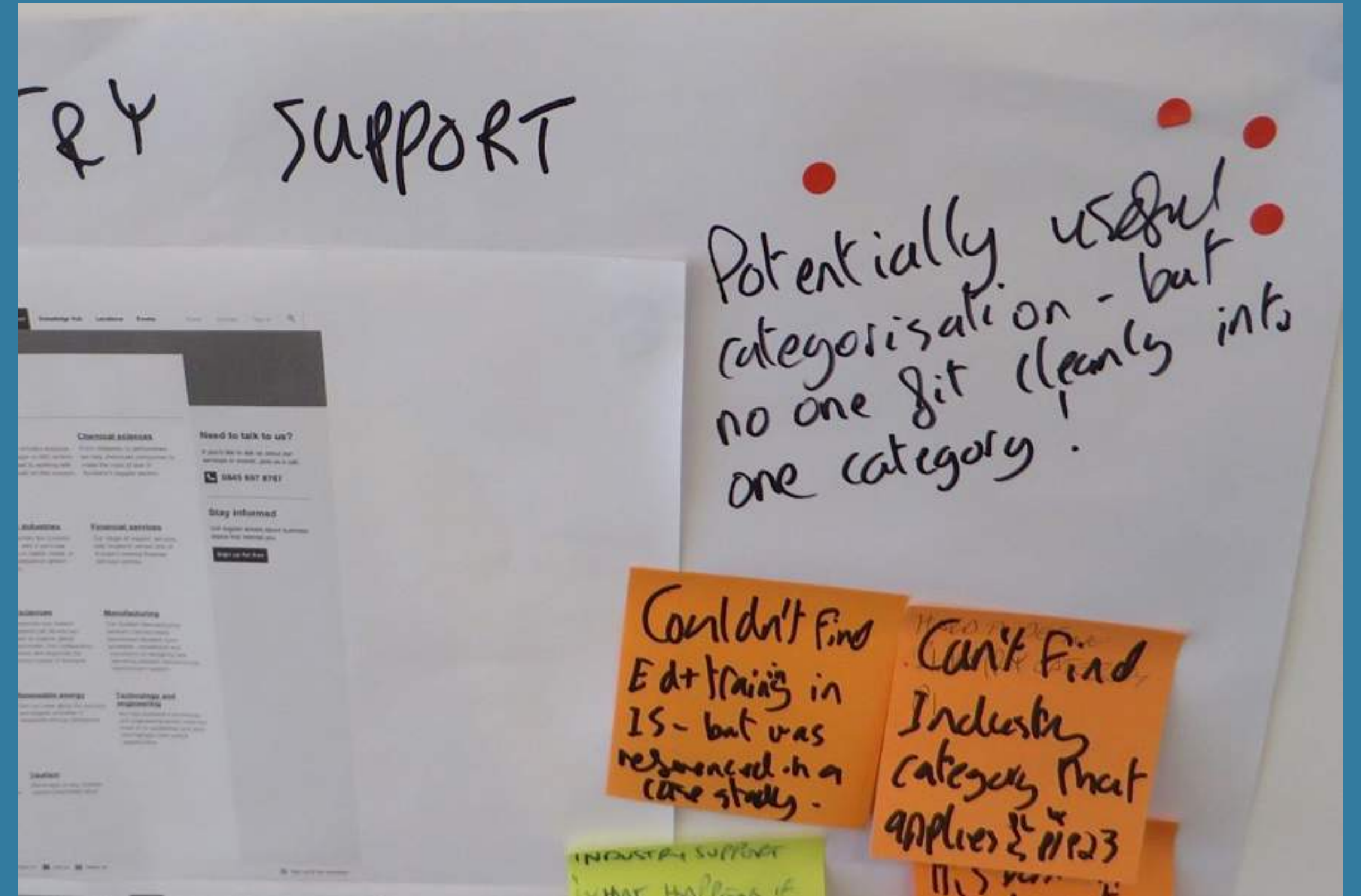
Conclusions &
next steps

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Conclusions and next steps

Conclusions

- The user testing has brought up some tactical and strategic issues with the current Scottish Enterprise site.

- The current site would benefit from a much more supported user journey that incorporates guide content alongside the service content that is already there.

- The homepage does not currently open up the site to the users. SE have identified some changes within the current template that will improve the experience. However, this needs to be monitored as a more fundamental redesign might be needed.

- The "Knowledge Hub" is an attractive resource, but the user needs to be able to filter and define the content shown to make it useful to them

Next steps

- The solutions workshop usefully identified areas that can be moved forward quickly after the testing

- For the more fundamental issues around the user journey and how the content on the site should be structured we feel that SE would get great value from running co-design workshops with business customers. This is a collaborative workshop approach that we have used several times with our current clients. It involves you and your customers in a workshop together and is an engaging and energetic way of getting feedback and taking forward concepts that work for both audiences. The next few slides give an overview of co-design workshops and what the output is.

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What is co-design

We recommend a collaborative workshop method called "co-design" to help us better understand user needs and to collaboratively develop designs.

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Why co-design?

xxxx

•xxxxx

The benefit of this approach over 1:1 sessions is that it allows the team to move forward more quickly as a greater number of ideas are generated. Ideas which aren't effective are identified much more quickly.

Also we are able to bring the right expertise into the room to address any issues early by working directly with customers e.g. UX design, proposition, tech.

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Deliverables

What you'll get

- Sketch concepts mocked up to an appropriate level of fidelity
- A report illustrating each concept associated with customer needs and insights

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