Show & Tell
Customer Research

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Research Team

Who We Are

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What We Do

- Variety of research activities and data analysis with the aim of getting feedback and insights directly from businesses we work with now and those that might work with us in future
- Work in an agile multi-disciplinary team environment, focused on service design and support for SE's digital transformation of its services
- We work within a wider team of designers, analysts, developers
- We conduct User Research and generate findings to shape the development of new digital services from discovery work to live
- Focus on user needs is maintained

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Our Approach

- We use a variety of research methodologies to reveal actionable insights enabling a rich picture of customers and other user groups

- Understand the business problem and devise appropriate research strategies

- Plan and design customer research sessions, testing both high level concepts and specific aspects of the service as it is designed and developed

- Lead usability testing process from developing user recruitment briefs through to test moderations, analysis and report writing

- Conduct research F2F, telephone, online, including guerrilla/pop-up testing

- Work closely with web analytics to integrate customer data and research findings

- Develop and present business/design recommendations based on analysis of findings within the user research projects

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Online Channels
SE.com & SDI.co.uk

Purpose

- To understand what customers want from the online domestic & international channels
- To test the strategic design principles
- To perform usability testing on the website wireframe prototypes, to validate initial concepts for future state layout/design.
- To inform the next design iteration

Customer Profiles:

- Scottish companies, non retail, turnover > 500K and not currently receiving support from us
- Field Staff, International companies with potential to invest, Globalscots

Sample

- 184 customers and staff engaged with us on the project
- F2F - 68
- Online - 105
- Telephone - 11

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SE.com Discovery

We explored:

- **Information looked for from Business Support organisations**
- **Where they currently go for such support**
- **Use of Online Channels**
- **Organisations providing good support & what does that look like**
- **Likely transactions on SE.com**

Prototypes: Home page

☺

☹

Everyone clicked on the video

"I Want To" menu was almost totally ignored

Most people gravitated towards this

These statements got in the way of the next section
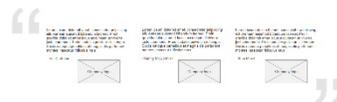
Well received

The STAT's were very well received, although authenticity was questioned

Not well understood or received

Well received

Mild praise but not warmly received

Most users viewed this as overkill on a home page

SE.COM Screenshots

We then asked users to view the prototype sketches of specific journeys:

- Guides Sections - needs to be higher up
- Eligibility for services made clear upfront, or signposting to other organisations who could help
- I want the homepage to be tailored to me
- Video – don't want SE promotional video. Needs to be changed very regularly to show the website is keeping up to date, "videos of case studies more impact".
- Sign in – business account with multiple logins preferred
- Language unclear and off putting, too much jargon

"leadership and learning is clumsy"

- The website needs to link to all other agencies offering businesses support and funding – what can we do? Who else can fill the gaps? A portal to all types of support
- Innovation important – could be upfront on site
- The categories for support look right

"SPOT ON!"

- Stats – impressive but not relevant to me
- Case studies – would prefer how to help companies achieve growth within the success stories. They need to be relevant to business age, stage of journey and industry
- Interactive – how can I feedback about the guides/drop downs if my industry isn't listed? I want to add my knowledge.

Themes

General

- Customers confused where to go for the right information
- Customers often unsure of which organisation they are dealing with
- Customers unclear why they get grant/support rejected

Requesting Customer Details

- Don't ask for too much information too early in the journey (eg high degree of surprise in asking for Companies House information)
- Belief that inputting details would result in "being marketed to"

Communication

- Majority of users preferred telephone number to call if they got stuck
- Live Chat mixed reviews
- Businesses are interested in help from organisations (such as SE) BUT only if it is relevant to them

Information

- Language needs to be clear
- The journey to get to relevant information should be simple and quick
- Large and impressive Stats are popular (but users questioned if they were real)
- Information "Below the Fold" remains a very real barrier to some users seeing the actual CTA's

Content

- Users expect most things to be clickable
- Users expect interaction to be quick so indicated time it takes seen as irrelevant
- The "Search Bar" was used as the preferred bailout method, when the user struggled to find what they were looking for
- Menu Options were well received (though sometimes missed initially)
- Too much content not well received (eg Learning/Development section showcase because not relevant to them at this time)
- Case Studies are good but need to be directed to me and my sector

Discovery - SDI.co.uk

Purpose

- To gain insight from field teams on what customers need from the SDI website and thoughts on the content.
- To gain insight from GlobalScots on drivers for relocating and investing in different locations.
- To inform the next iteration of the website

Sample

- Number: 9 staff / 5 Globalscots
- Country: India, US, London, Germany, Glasgow
- Type: Skype and Face to Face testing

Key Themes

Field Staff

- Company priorities are **Finance, Staff** and **Opportunities**
- Language needs to be more positive and sales orientated
- Headline is unpopular as it mentions London and positions Scotland as 2nd best
- Brexit content is important
- Enthusiasm for the Guide to Scotland

Globalscots

- **Talent and skills –** number one critical factor
- **Stability –** key to attract investment
- **Brexit –** Needs to be addressed, sector specific concerns
- **Critical factors in foreign direct investment –** Talent and skills, education, grants, tax, funding, sustainability
- **Scotland's attractiveness –** Skills, universities, innovation and ease of set-up

"Needs to be more sales orientated rather than facts/guides"

"So what makes Scotland different?"

"Non-native English speakers might not use these words"

"Show me market opportunities"

"Have an 'Oven Ready' catalogue of investment opportunities"

"What is the UK post Brexit? Is it even the UK?"

"Investors are quite impressed with SE and Visit Scotland support. It is much tougher to get that level of support in London"

Quotes

"I love things on the internet that are simple such as HMRC"

"The Stats look Great – are they real?"

I don't want an account at this stage. I am only making an enquiry"

"FAQ's were cool" in the live chat box.

"I just wouldn't scroll"

""I am not in that category anymore so I am not sure how you can help me"

"I would apply online as long as the form is not 10 pages long"

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Next Steps

Upcoming Research:

- Ongoing SE.com

- Ongoing SDI.co.uk

- Corporate Website

- Brexit Diagnostic

- Funding & Support (Large Grants Single Approval Paper & Offer Letter)

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