

A large, stylized graphic of an eye is positioned on the right side of the slide. The eye is white with a dark blue pupil and iris, set against a magenta upper eyelid and a light blue lower eyelid. The entire graphic is set against a dark blue background.

Invest NI

Quarterly Survey of Customers & Wider Business Base
in Receipt of Support
Qtr 3 2019

October to December 2019

191511



Methodology

- In conducting this research a telephone methodology was employed. The 10 minute questionnaire had been utilised for many years and remained consistent to enable comparisons with previous waves.
- Throughout the fieldwork period, Millward Brown interviewers worked under direct supervision, with approximately 10% of all interviews being monitored by the Call Centre manager using remote 'listening in' facilities. This process ensures that the quality and consistency of interviewing is maintained at all times, fully complying with the standards enshrined within IQCS (Interviewer Quality control Scheme). During each shift, interviewers provided feedback on an ongoing basis so any issues arising could be resolved and dealt with in real time.
- **All research conducted in accordance with ISO 9001:2008, the international quality standard ISO 20252: 2012 and the Market Research Society ethical Code of Conduct. MRQSA Market Research Quality Standards Authority.**



Sample

- Some 185 interviews were completed, 81 of these were Account Managed Customers and 37 were Regional Office Customers, all who accepted a letter of offer or support between October 2019 and December 2019. A sample of 67 were the Wider Business Base who had some form of interaction with Invest NI between October 2019 and December 2019. Of the 185 participating customers and WBB, 88 Customers and 53 WBB agreed to their responses being attributable. These responses have been provided in a separate report.
- Within this report, top line scores for Account Managed Customers, Regional Office Customers and WBB are illustrated for comparison purposes.
- The data has also been broken down by level of financial assistance and support area (grant support and programme support).
- Caution should be applied when comparing some of the results due to the very small base sizes involved in some instances. They should be seen as indicative rather than conclusive.

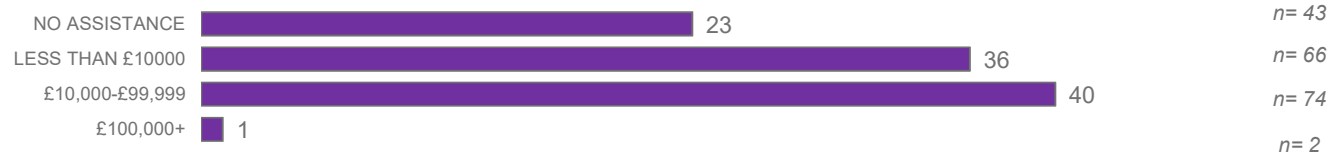
Analysis of Sample



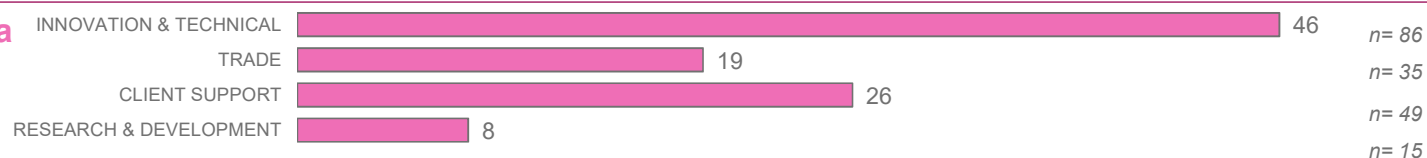
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Base

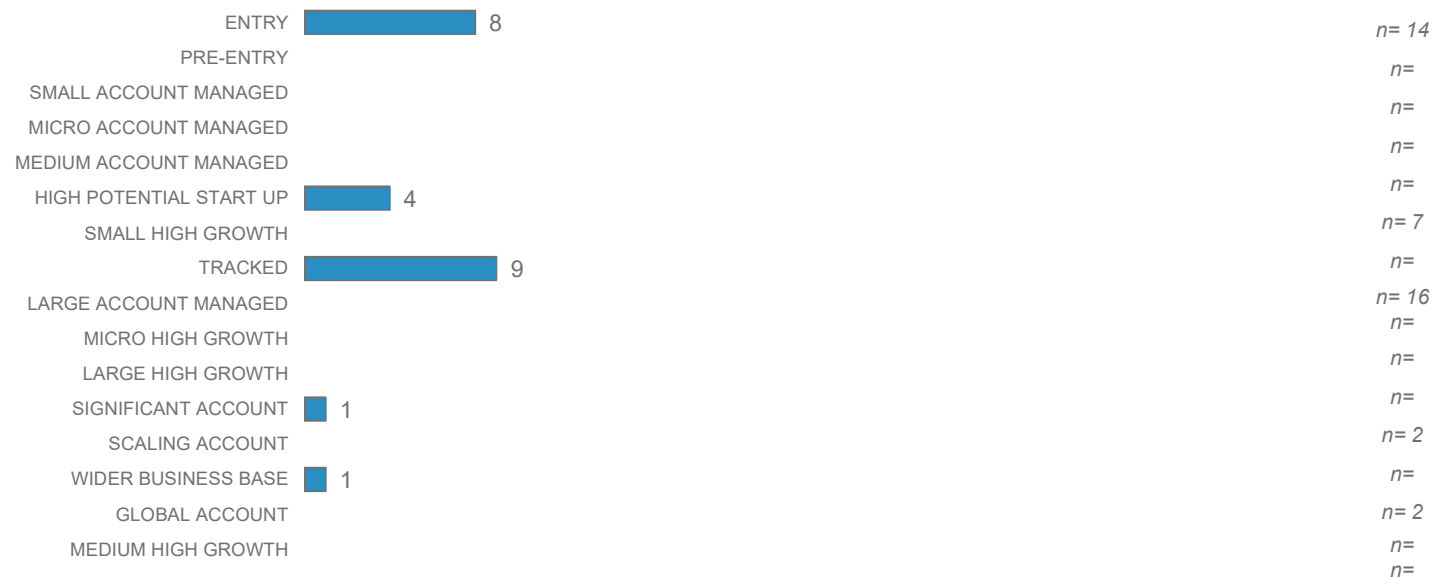
Assistance



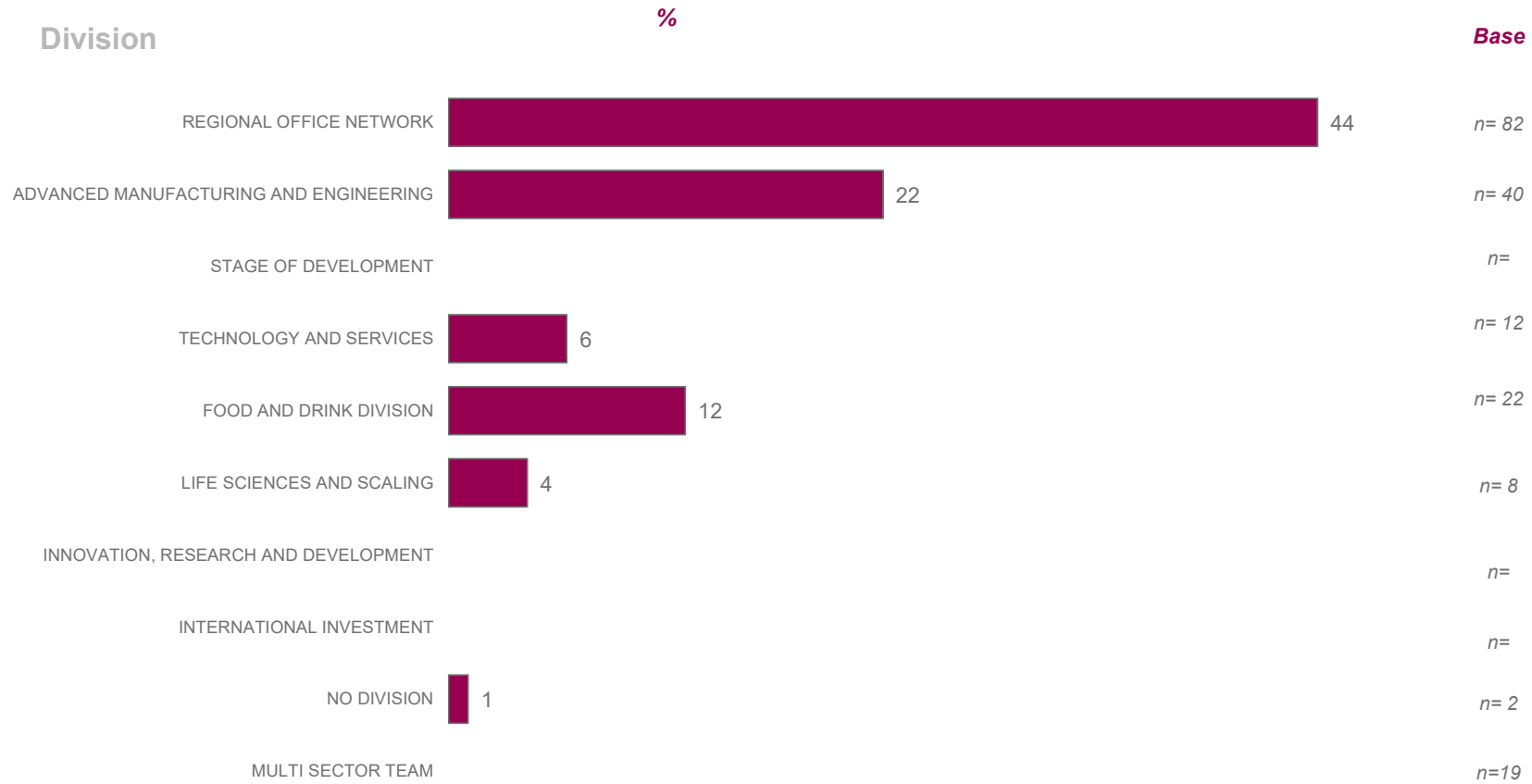
Support Area



Segment



Analysis of Sample cont'd





Technical Note

- **NOTE:** *In some instances there may be a difference of 1% between the figures depicted on the charts and in the commentary e.g. 45% agree strongly, 45% agree slightly, but the overall agreed figure is 97%. This is due to a rounding of decimal places. In this example, the original results may have been 44.6% and 44.6% thus each rounded up to 45%. When combined this equals 97.2%, which is presented as 97%.*



Executive Summary (1) - Customers

Key Performance Indicators

- In Q3 2019, satisfaction with overall service received remained consistently high across the total sample with over 9 in 10 (93%) claiming to be satisfied. Within this, almost 7 in 10 (68%) were 'very satisfied' with Invest NI overall. These satisfaction results are slightly up on Q2 2019 (90%) findings.
- Over 9 in 10 of Account Managed Customers surveyed (93%) stated they were satisfied (consistent with Q2 2019 - 94%). Around two thirds (67%) of Account Managed Customers expressed they were 'very satisfied' (similar to Q1 2019 - 65%).
- All Regional Office Customers (100%) claimed to be satisfied, higher than Q2'19 (86%) results, and there was also an incline in those who claimed to be 'very satisfied' (from 68% to 76%) .
- Some 88% of wider business base customers were satisfied, with around two thirds (64%) very satisfied.
- Levels of satisfaction remained high across both support areas. Grant support received a mean score of 4.59 (up from Q2'19 at 4.56) and Programme support received a mean score of 4.57 (up from 4.49 in Q2'19).



Executive Summary (2) - Customers

Key Performance Indicators

- In Q3 2019, advocacy levels were high with over 9 in 10 (91%) customers stating they would speak highly of Invest NI (higher than Q2'19 at 86%).
- Advocacy levels were higher among Account Managed Customers (91%) than Regional Office customers (92%) (Q2'19 Account Managed customers 90% / Regional Office customers 85%). Of the WBB customers participating, over 9 in 10 (91%) would speak highly of Invest NI.
- Levels of advocacy were higher for Programme than Grant support, 4.46 and 4.37 respectively. These results were similar to Q2'19 for Grant support (4.37) and higher for Programme support (4.27).
- Invest NI achieved a Net Promoter Score of +59 (consistent with Q2'19 +59). The Net Promoter Score amongst Account Managed Customers was +66 and +62 among Regional Office customers. A score of +51 was achieved among the WBB.



Executive Summary (3) - Customers

- Over 4 in 5 (83%) customers agreed that Invest NI was helping to develop their business, levels higher than Q2'19 (79%). Agreement was 81% across Account Managed Customers and similar across Regional Office Customers (81%). Agreement was higher among the WBB (87%).
- In terms of support areas, the highest mean score in relation to Invest NI helping develop business was achieved among those receiving programme support (4.32) compared to grant support (4.21). Figures for programme support had increased while there was a downward trend among those receiving grant support since Q2'19 (4.16 and 4.39 respectively).
- There was almost universal agreement amongst customers (98%) that Invest NI acts with professionalism and integrity, with almost four fifths (76%) of customers strongly agreeing with this sentiment. Agreement levels were highest among Account Managed Customers with all agreeing (100%), while 97% of Regional Office Customers agreed. Some 94% of WBB customers agreed.
- Levels of agreement were high across the support areas, with Grant support receiving a mean score of 4.69, slightly lower than Q2 '19 (4.74), and Programme support receiving a mean score of 4.71, higher than the previous quarter (4.69).
- Levels of agreement that Invest NI exceeded expectations had increased from Q2 2019 (78% in Q3 compared to 69% in Q2). Agreement levels were higher among Account Managed Customers (81%), compared to Regional Office Customers (70%).



Executive Summary (4) - Customers

- In Q3 '19, over 9 in 10 (91%) customers agreed that Invest NI delivered value to their business (Q2'19 at 83%). Agreement levels were similar across the Account Managed (93%) compared to Regional Office customers (92%).
- Three quarters (75%) agreed that they received information on additional support programmes that are available from Invest NI. These levels of agreement were higher than Q2'19 (70%). Overall agreement among Regional Office customers was 73%, lower than Account Managed customers (79%).
- Over 9 in 10 customers (92%) were in agreement that a realistic timescale was discussed and agreed for planned activities. A finding that was higher than the previous quarter (84% in Q2'19).
- Agreement levels among Account Managed customers (92%) had increased marginally since Q2'19 (89%). Agreement levels among Regional Office customers (91%) had also inclined since Q2'19 (83%).
- The vast majority (96%) were in agreement that Invest NI treated them fairly, similar to Q2'19 (94%). Across customer segments, all Regional Office customers (100%) agreed while 94% of Account Managed customers agreed.



Executive Summary (5) - Customers

Key Drivers of Satisfaction

- A key drivers' analysis conducted on the monthly survey data (at beginning of the contract) revealed the seven top drivers of satisfaction were:
 - Helping to develop customers' businesses;
 - Delivering value to customers' businesses;
 - Tailoring solutions to meet business needs;
 - Satisfaction with Client Executive;
 - Discussing and agreeing a realistic timescale for planned activities;
 - Responding to queries in a reasonable timeframe; and
 - Being clear at the start if and how Invest NI could help customers' businesses.
- In Q3 2019, all key drivers of satisfaction achieved a mean score of no less than 4.36 out of a possible 5. The top five rated drivers for Q3 were clarity of communication (4.61), responded to queries (4.57), explained and agreed requirements (4.54), completed to agreed timetable (4.54) and discussed timetable (4.52).



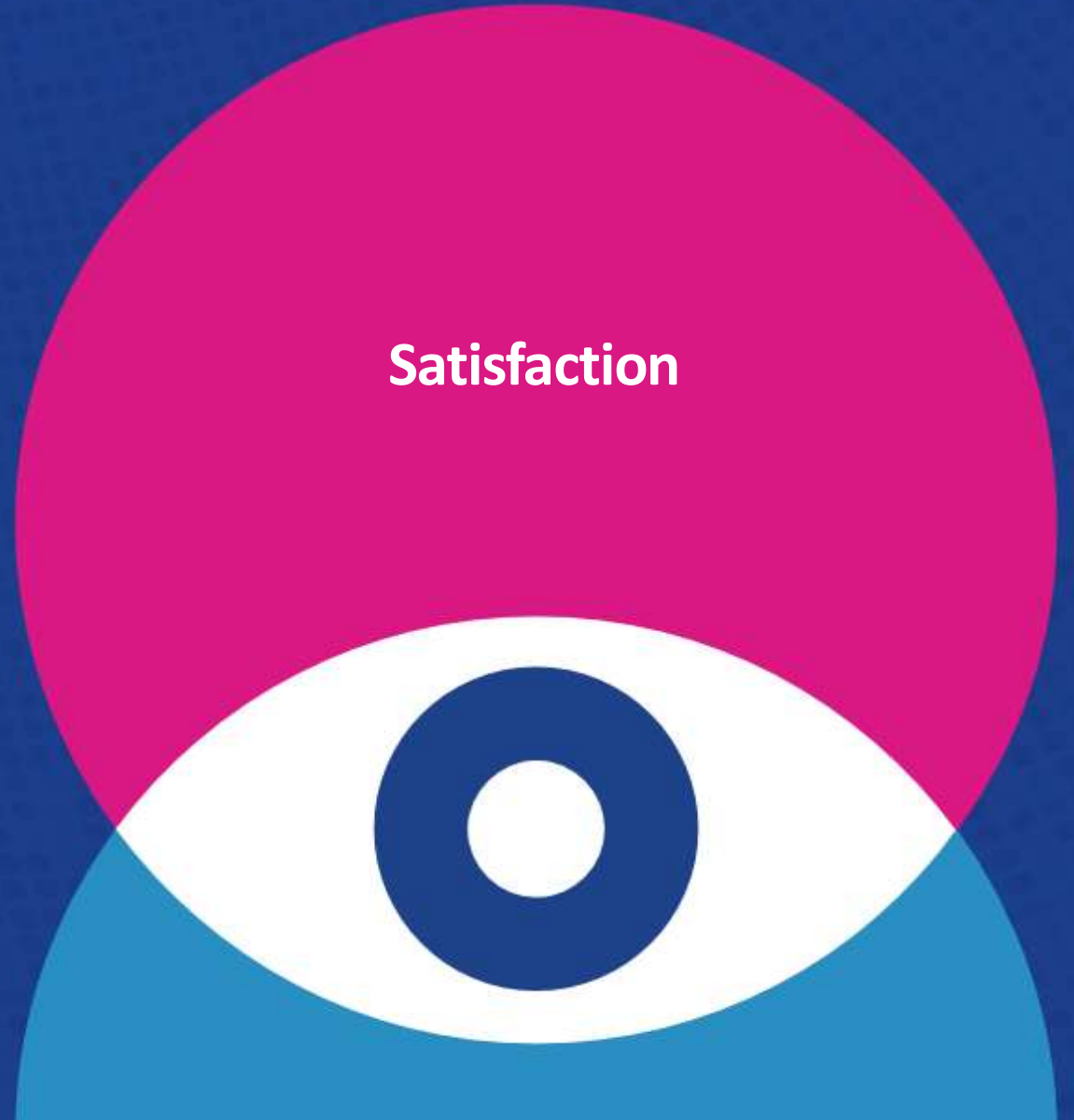
Executive Summary (6) - Customers

Detailed Performance Measures

- In Q3 2019, the average mean score for overall performance was 4.48 out of a possible 5. The mean score was higher than Q2'19 (4.35).
- All performance areas achieved a mean score of no less than 4.36 out of a possible 5, higher than Q2'19 (4.12).
- The strongest performing areas were clarity of communication (4.61), responded to queries (4.57), explained and agreed requirements (4.54), completed to agreed timetable (4.54) and discussed timetable (4.52).
- The weaker aspects of the engagement included proactive in support / advice (4.36) partnership approach (4.36).
- The mean score for the overall performance by segment were as follows:
 - Account Managed customers = 4.49
 - Regional Office customers = 4.55
 - Wider Business base = 4.44

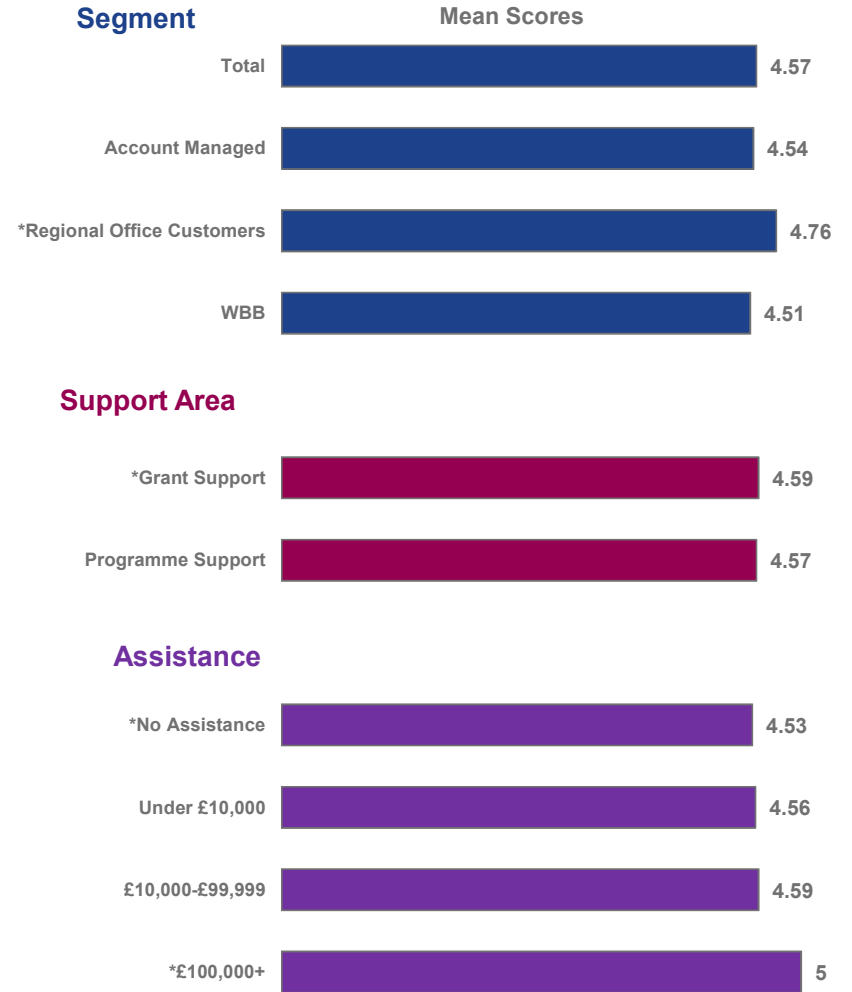
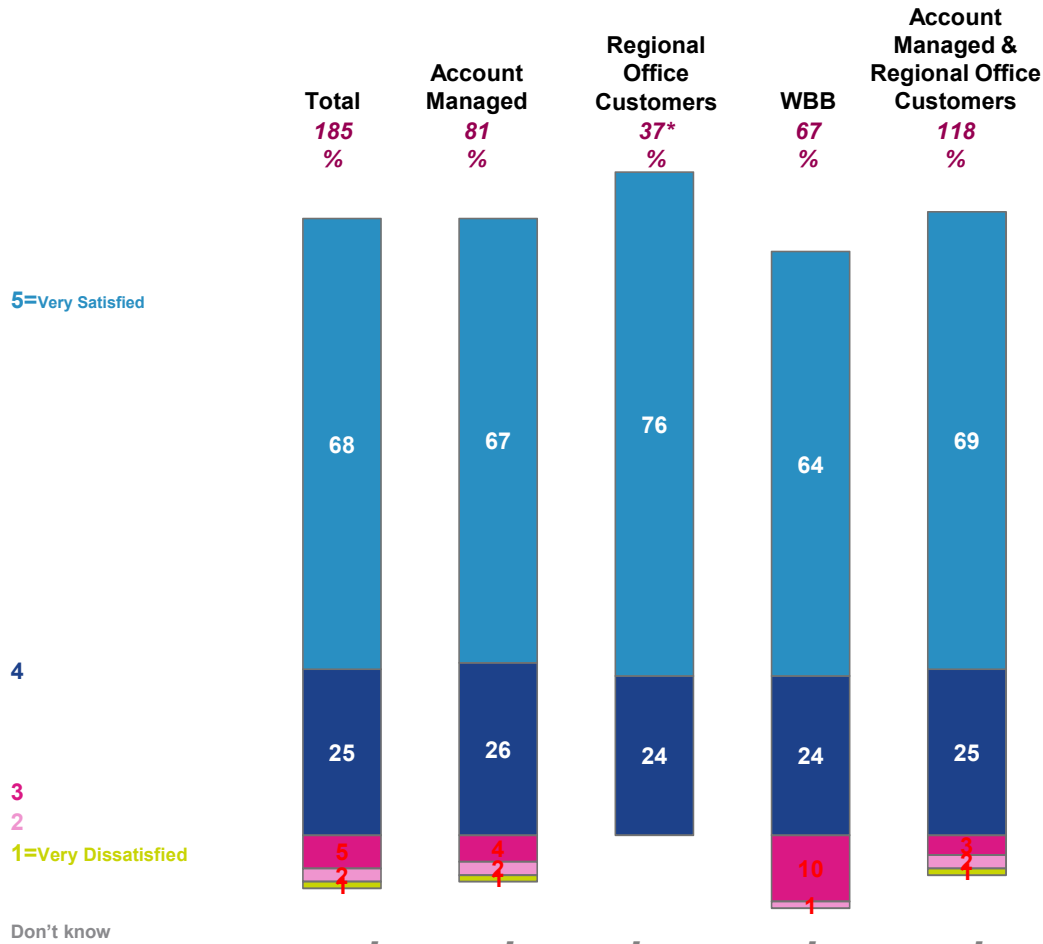
Cognisense

Satisfaction



Key Performance Indicator – Satisfaction

**Small Bases = less than 50*



Cognisense

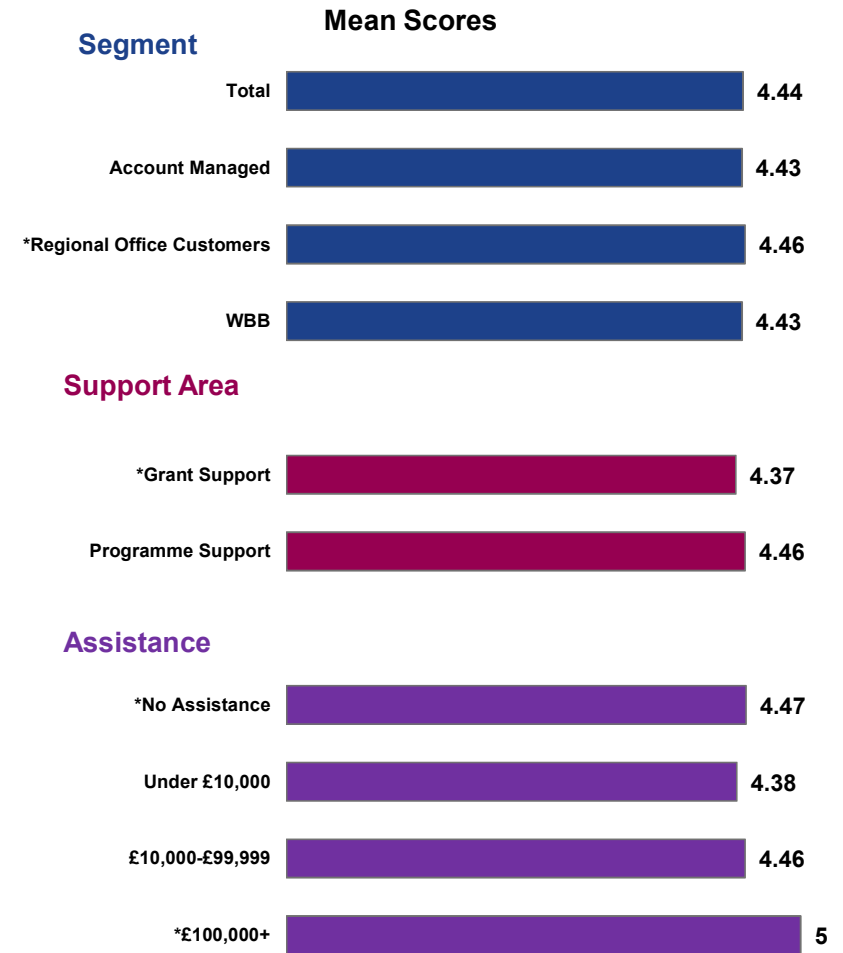
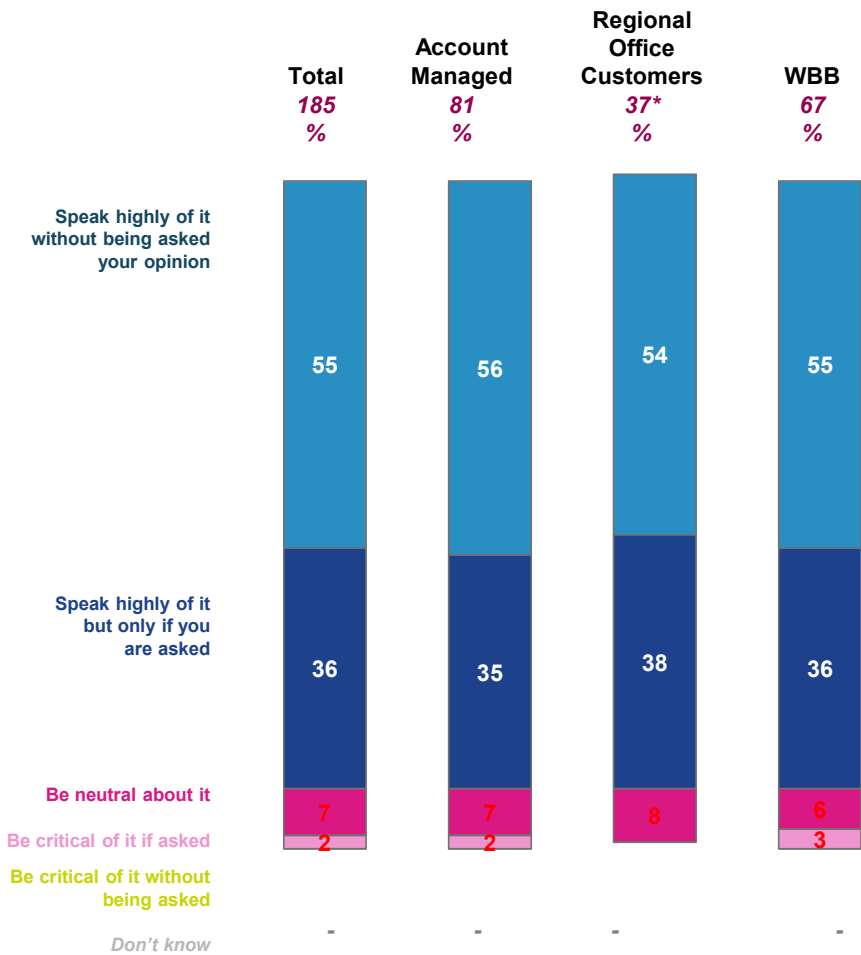
Advocacy





Key Performance Indicator – Advocacy

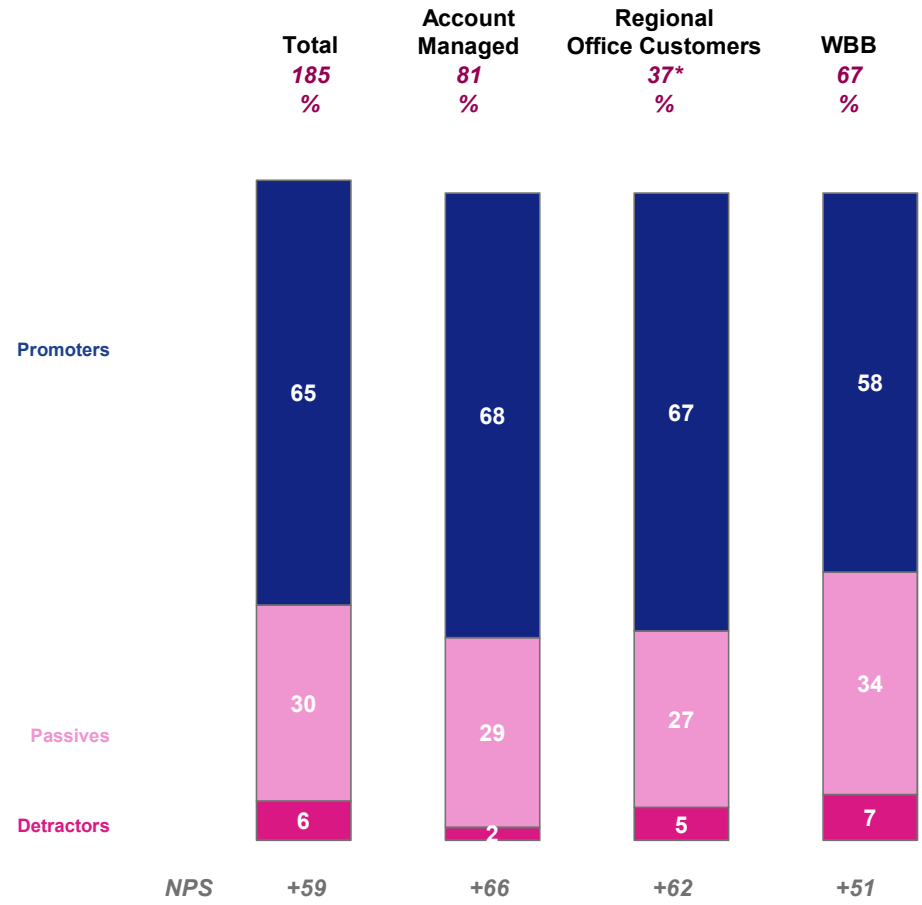
**Small Bases = less than 50*





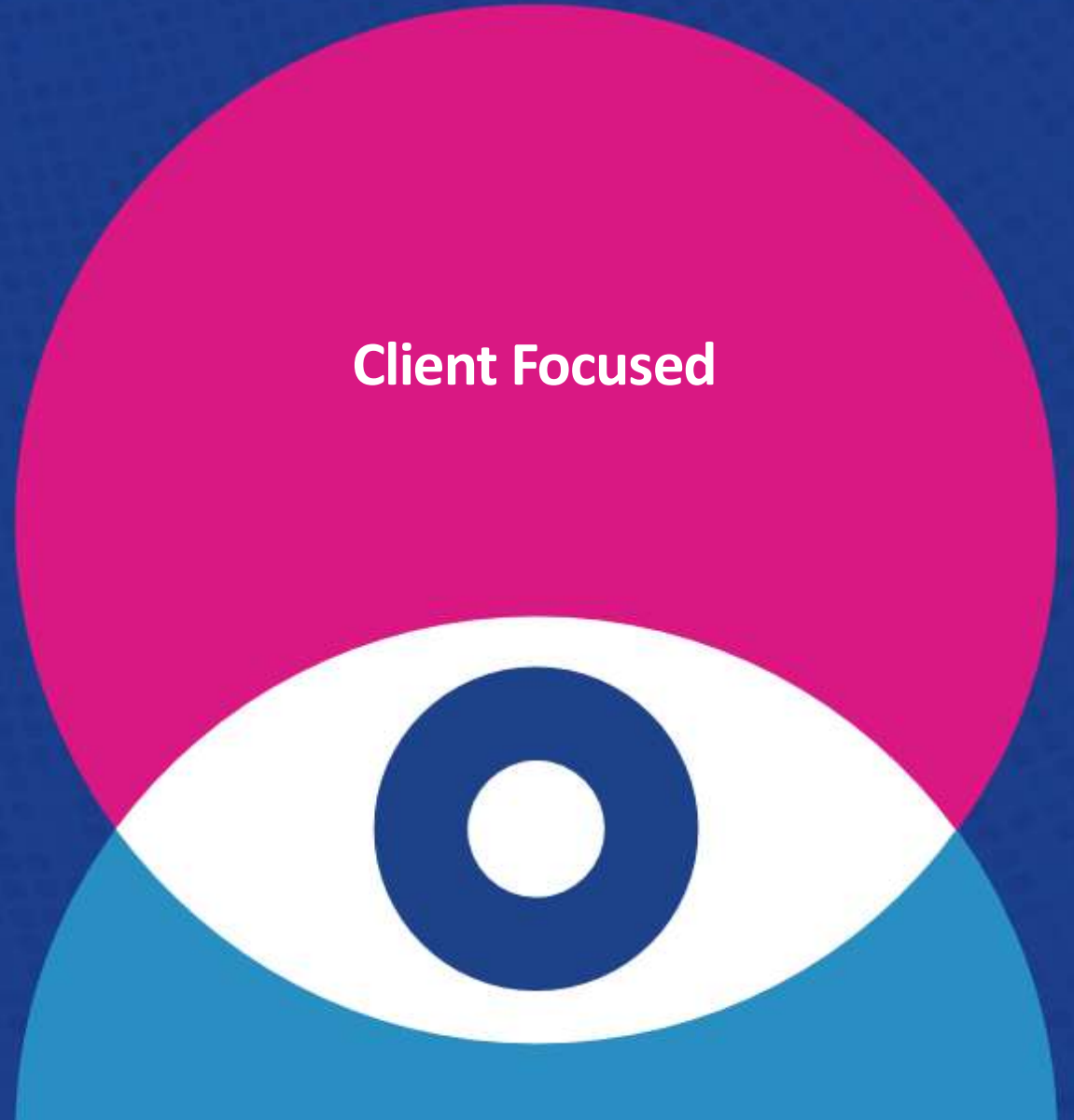
Net Promoter Score

**Small Bases = less than 50*



Cognisense

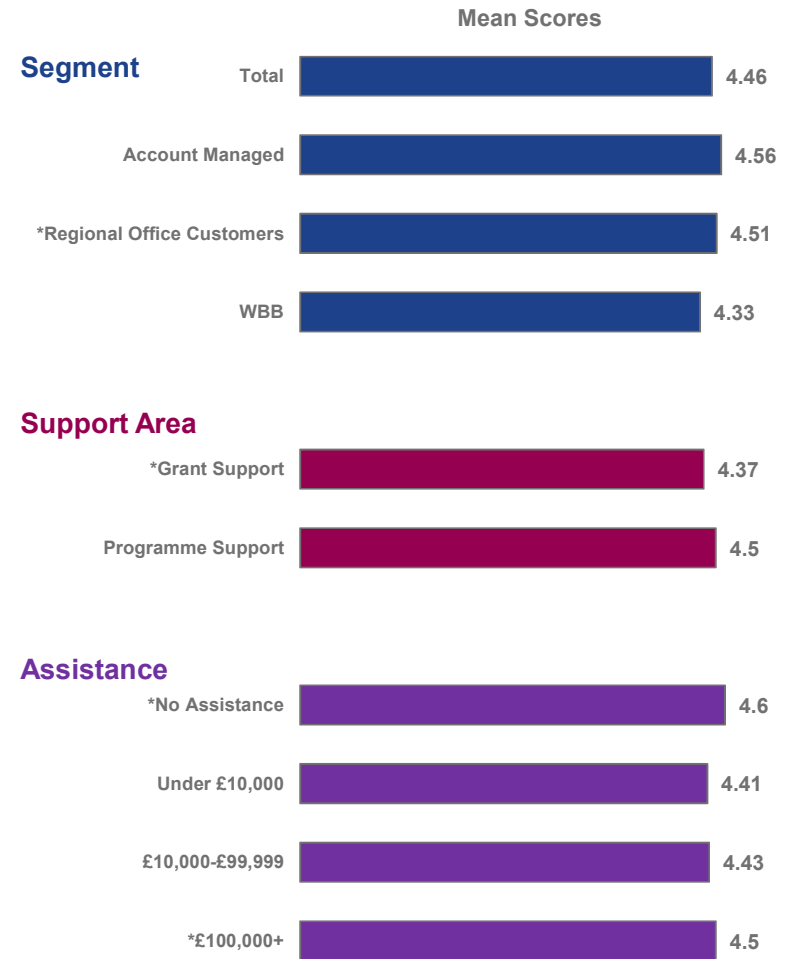
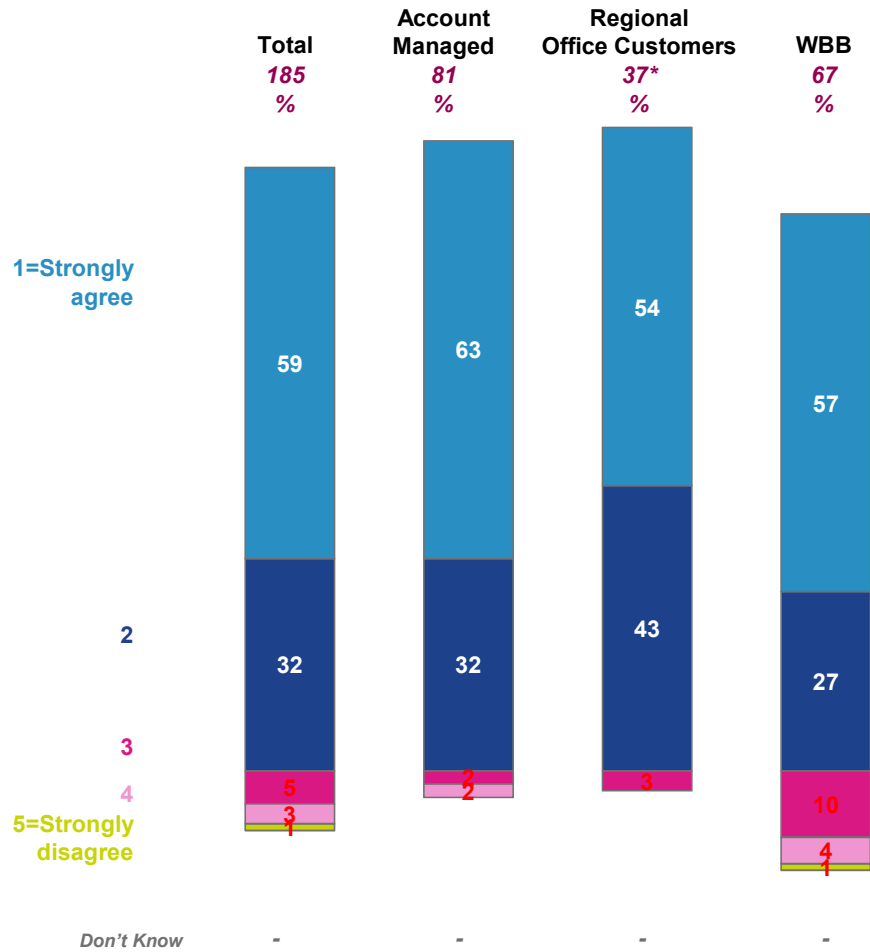
Client Focused



Key Performance Indicator – Client Focused

‘Made it clear at the start if and how it could assist your business’

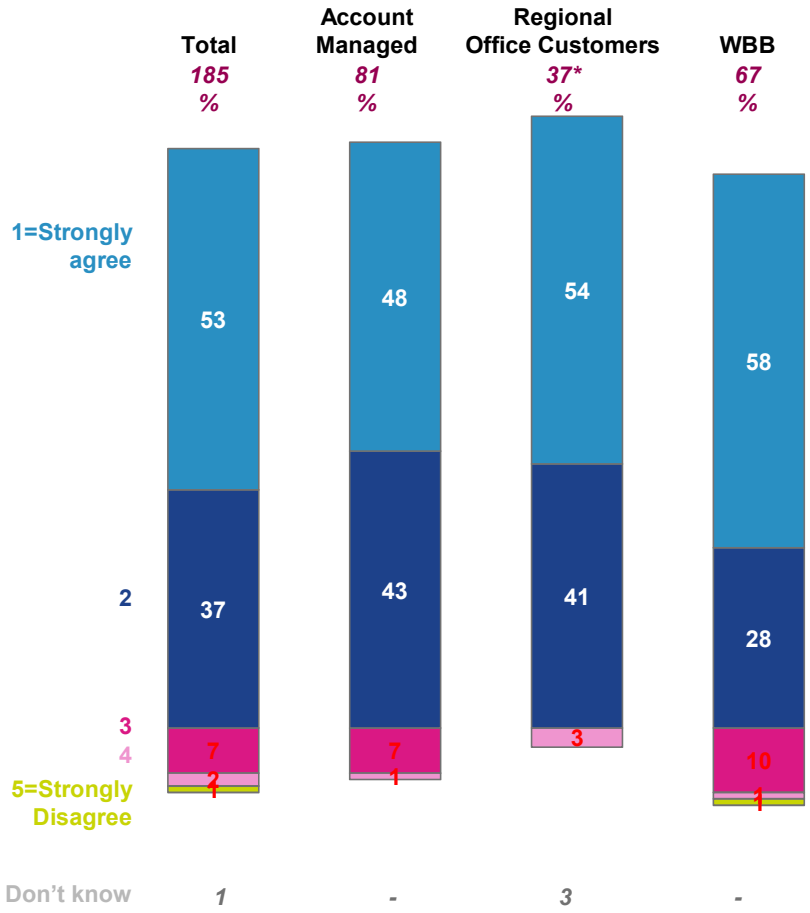
*Small Bases = less than 50



Key Performance Indicator – Client Focused

'Had sufficient understanding of your business needs'

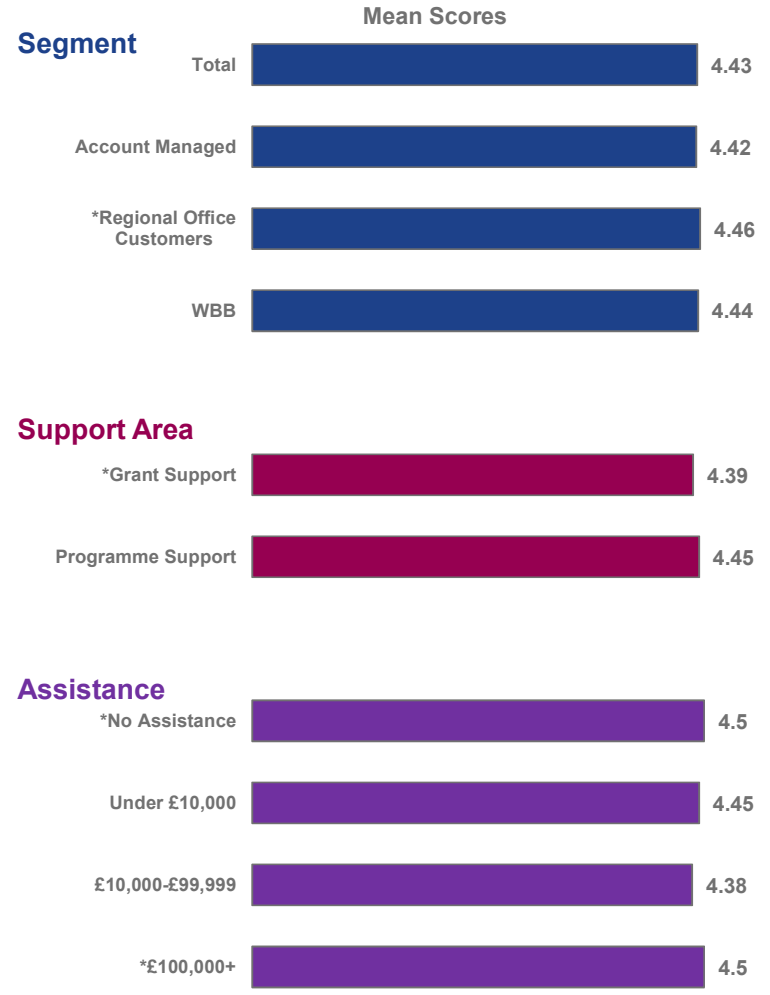
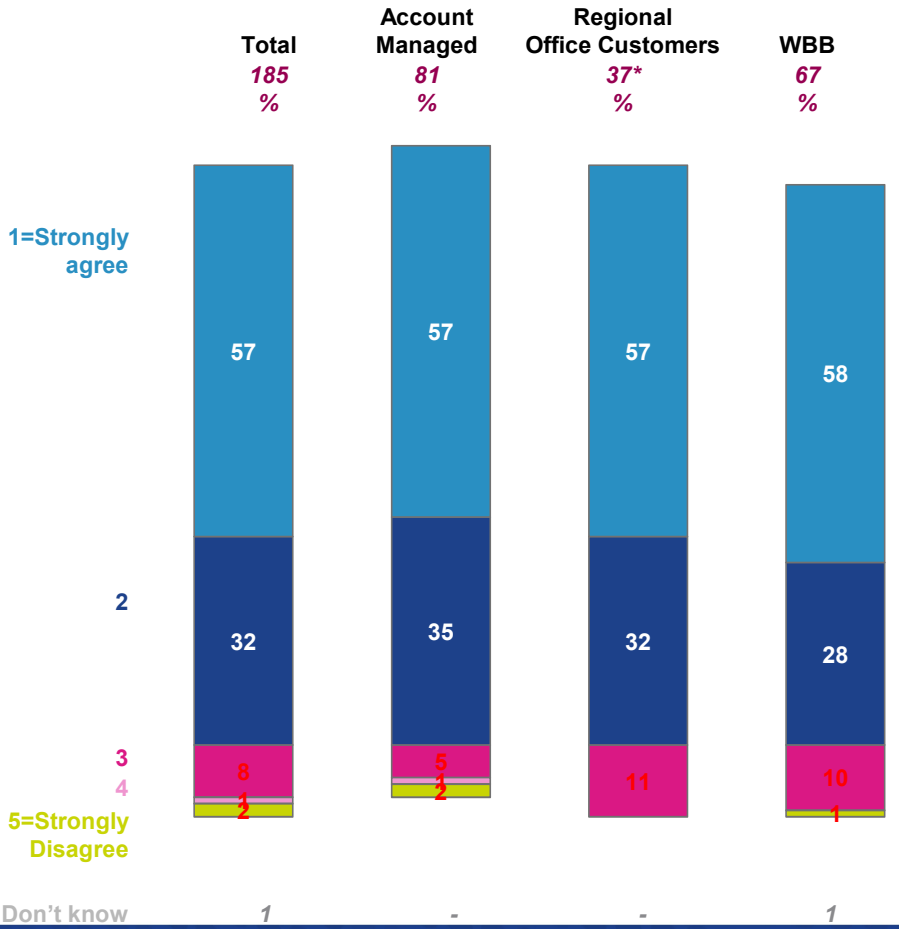
*Small Bases = less than 50



Key Performance Indicator – Client Focused

'Tailored its response to meet your business needs'

*Small Bases = less than 50

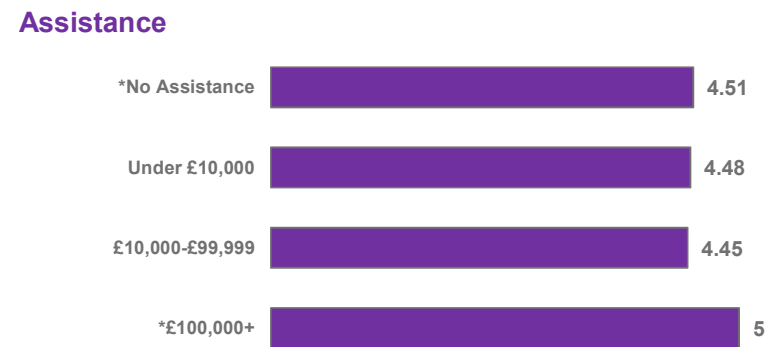
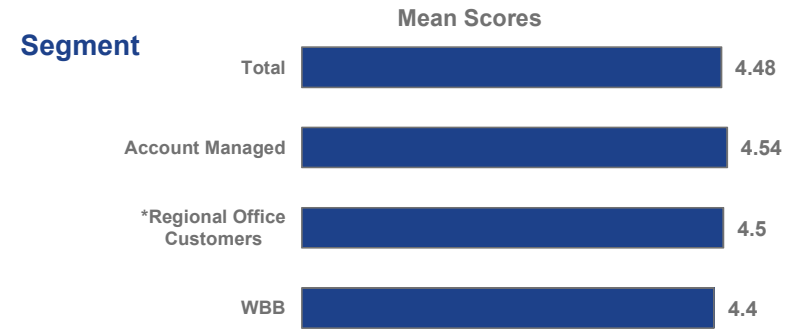
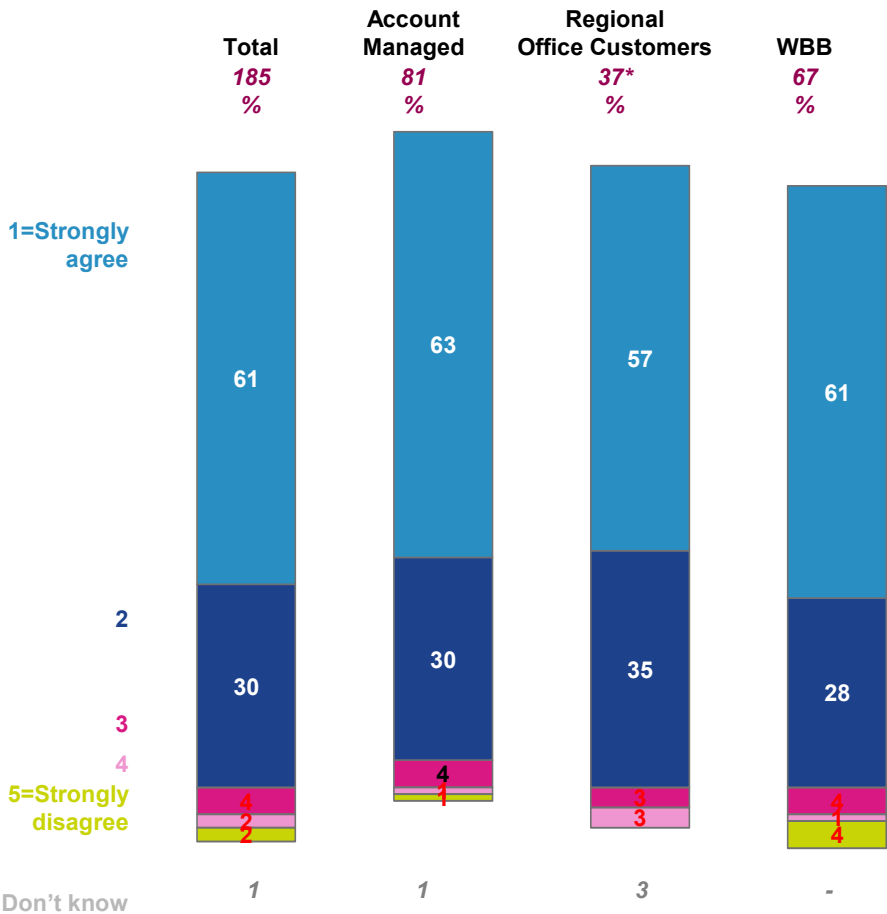




Key Performance Indicator – Client Focused

‘Delivered value to your business’

**Small Bases = less than 50*

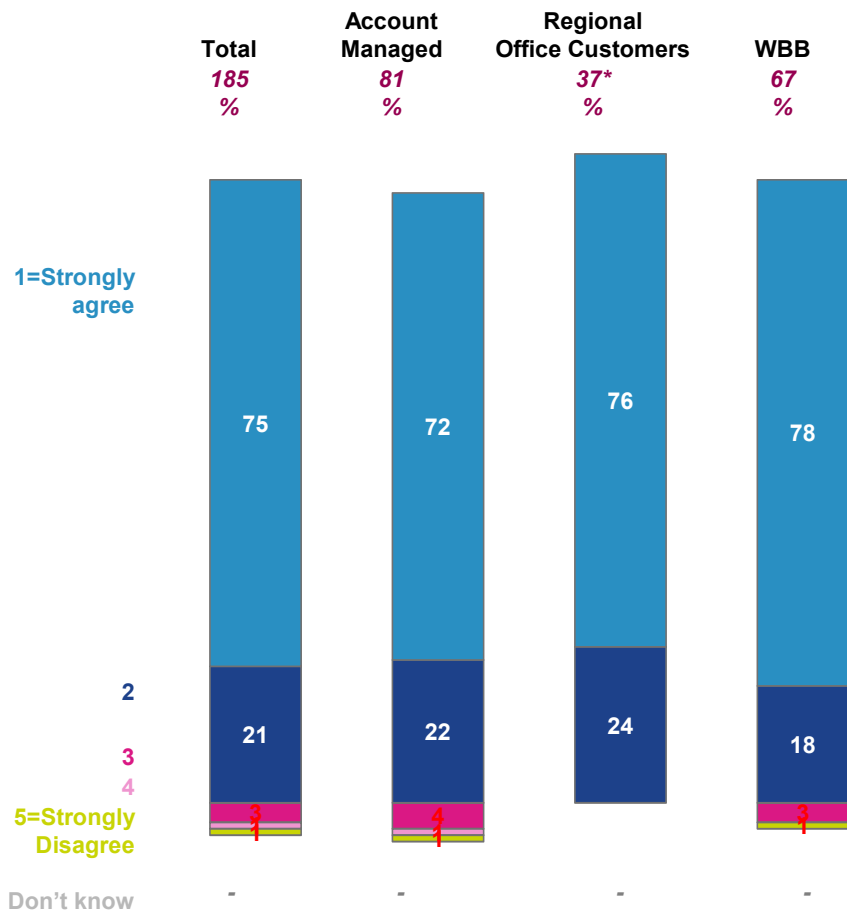




Key Performance Indicator – Client Focused

'Treated You Fairly'

**Small Bases = less than 50*



Segment



Support Area



Assistance



Cognisense

Process Management

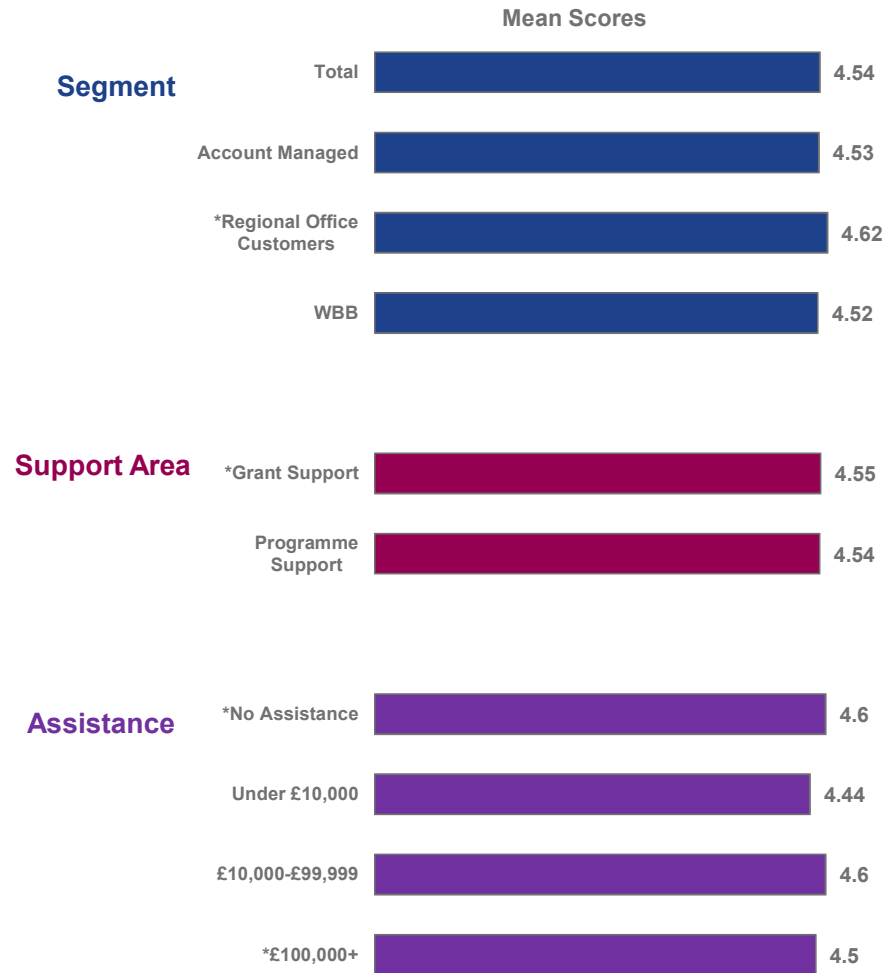
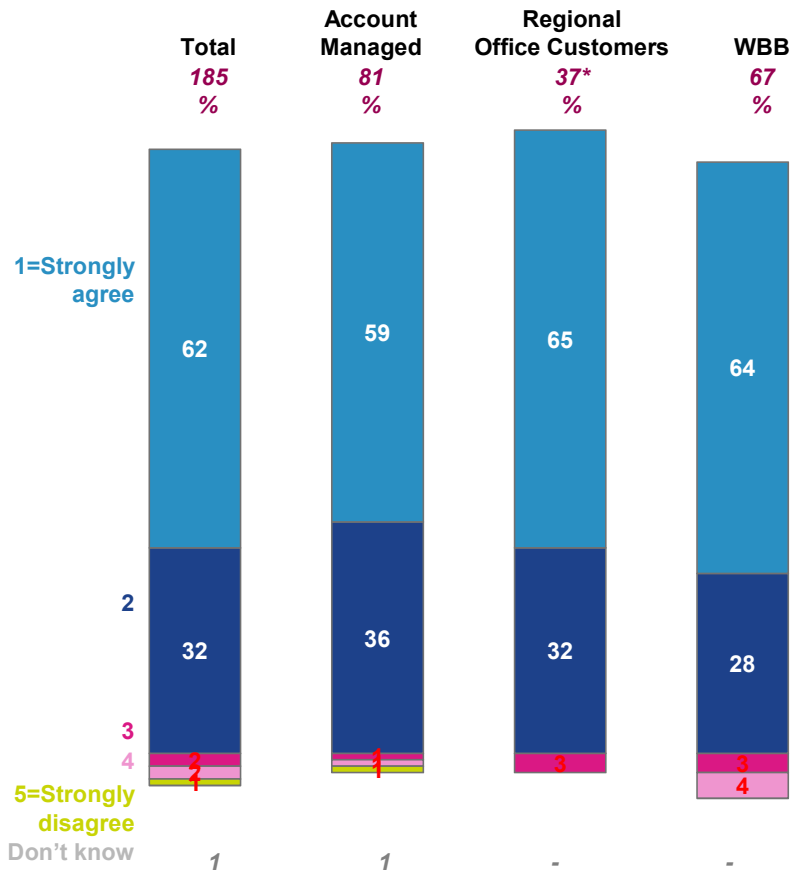




Key Performance Indicator – Process Management

‘Explained and agreed detailed requirements’

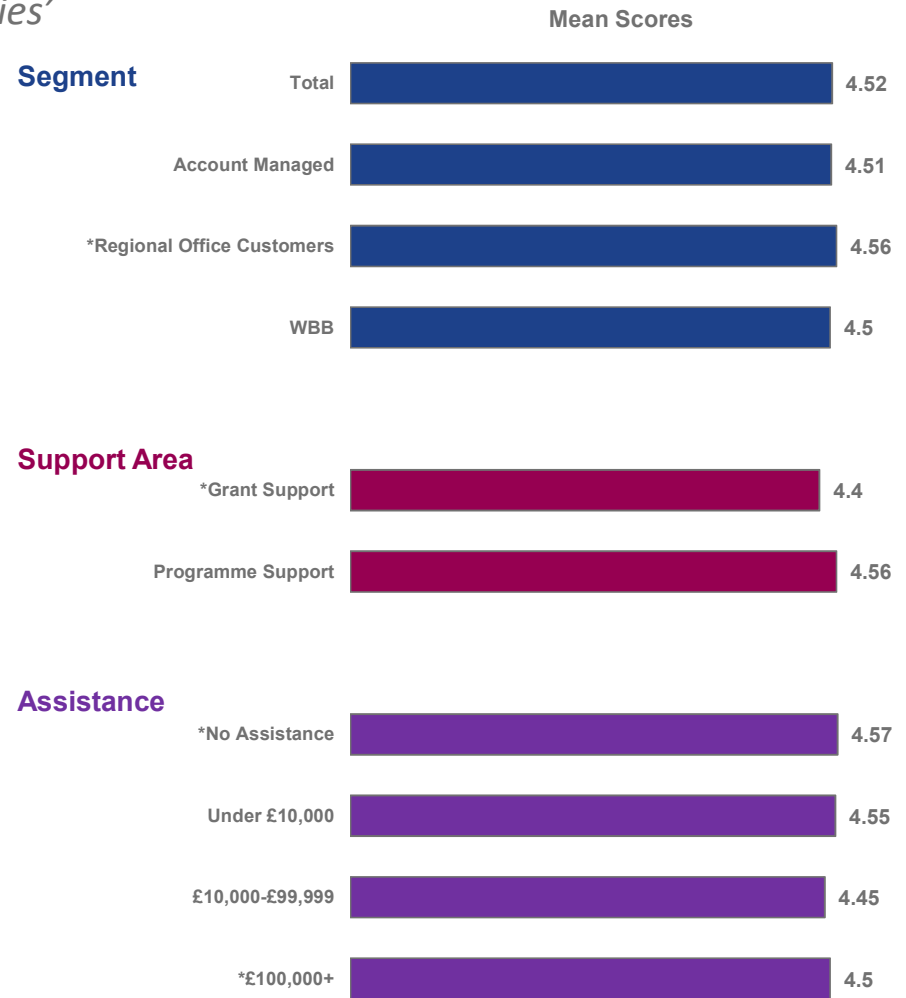
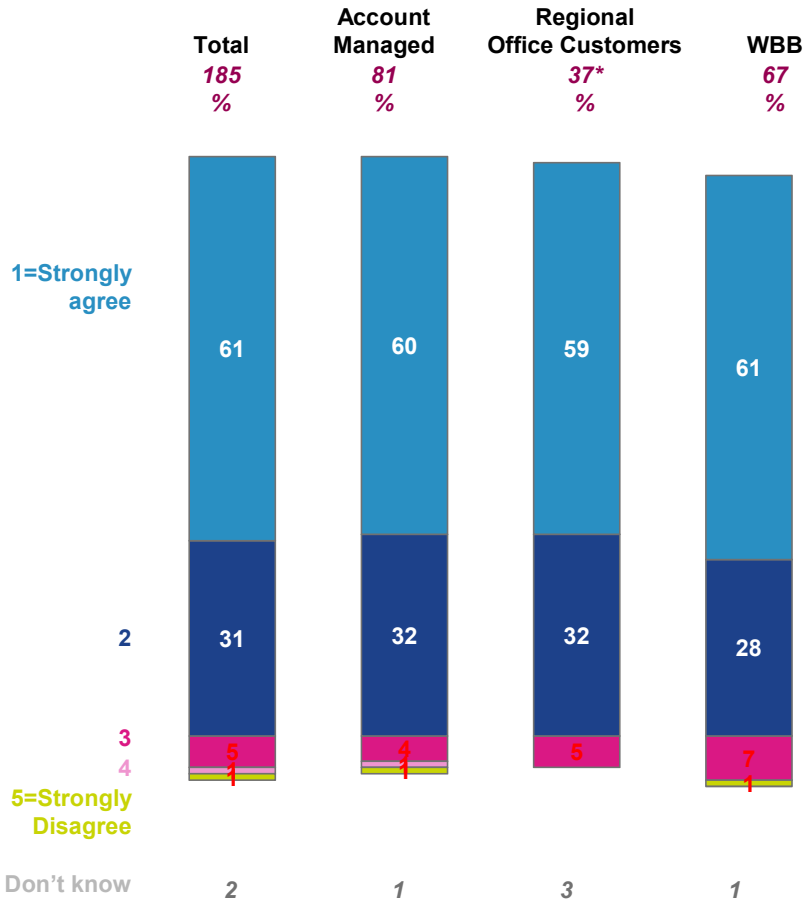
*Small Bases = less than 50



Key Performance Indicator – Process Management

‘Discussed and agreed a realistic timescale for planned activities’

*Small Bases = less than 50

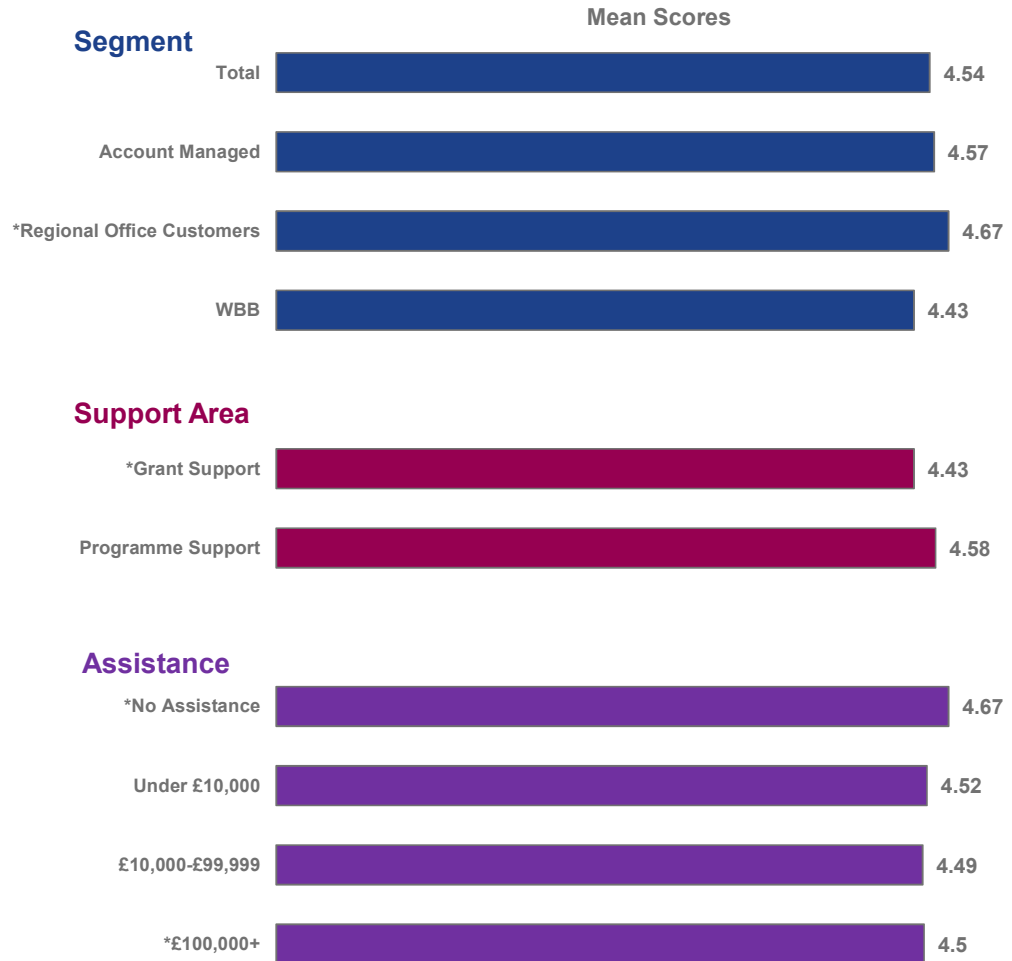
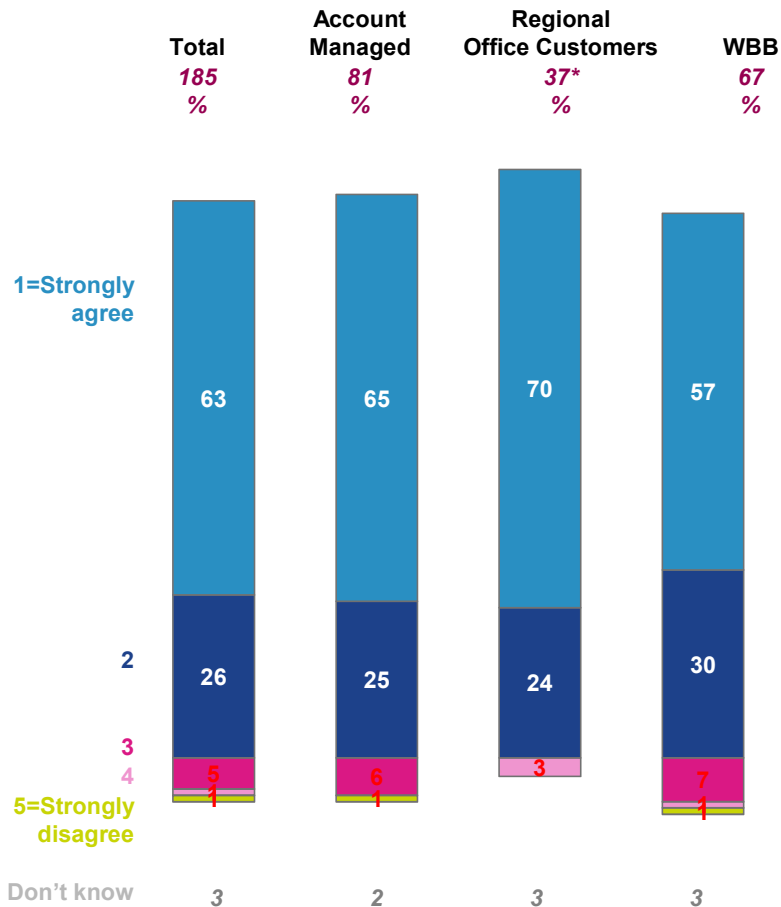




Key Performance Indicator – Process Management

‘Completed activities according to the agreed timeline’

*Small Bases = less than 50

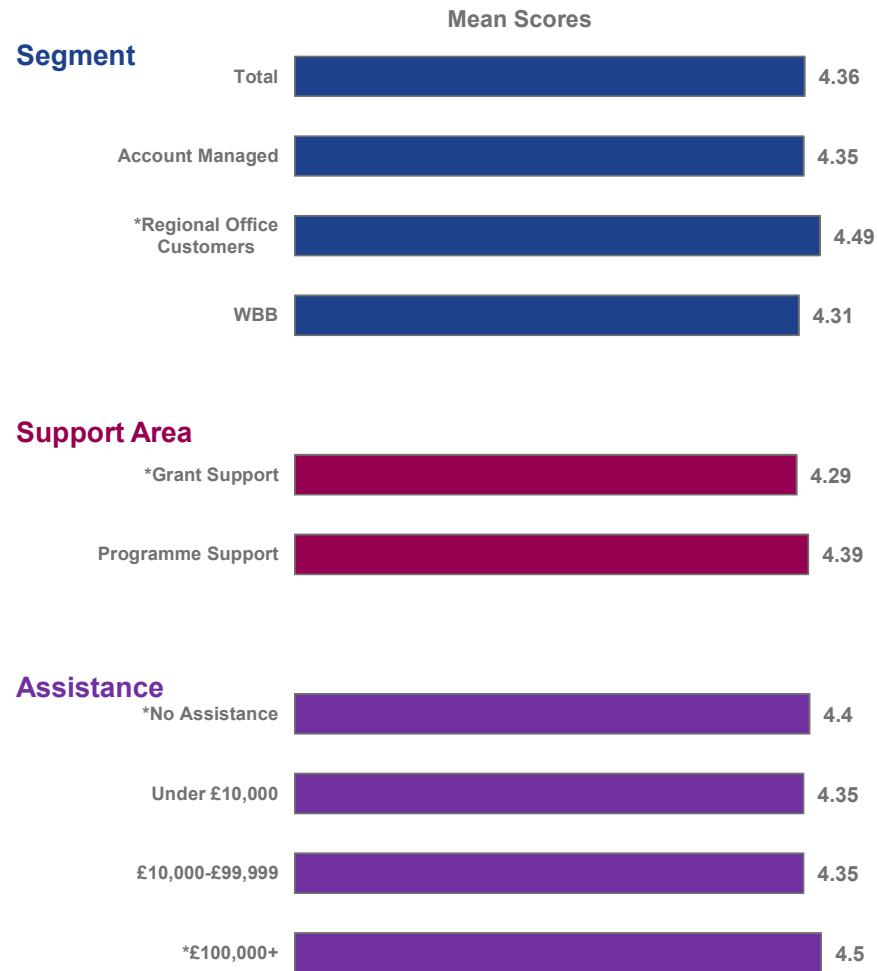
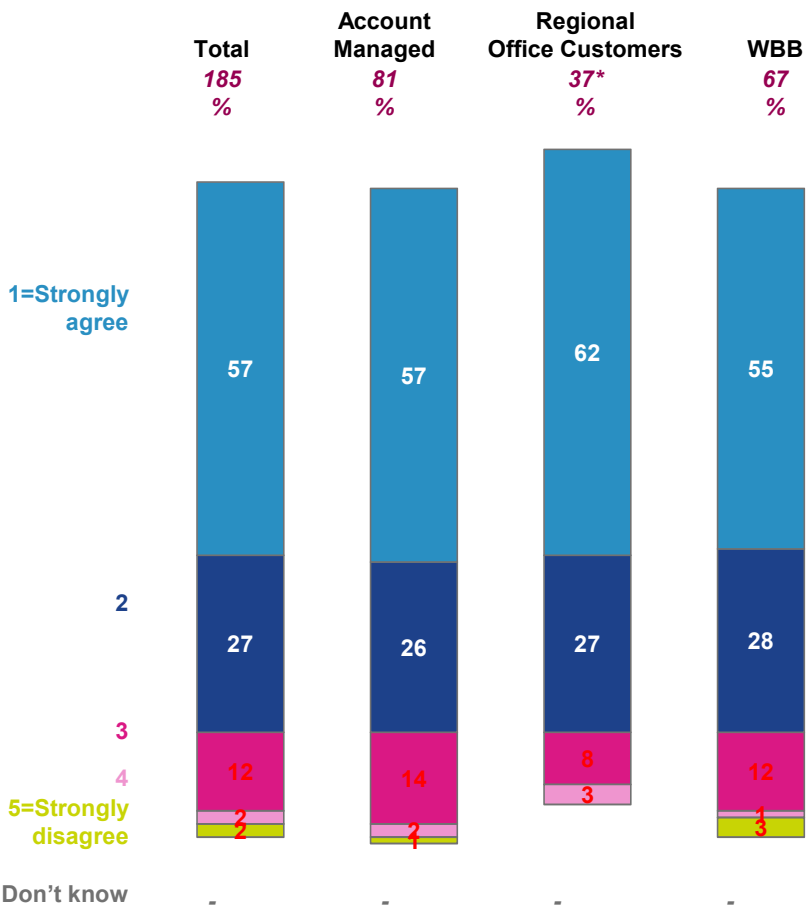




Key Performance Indicator – Process Management

'Was proactive in providing advice and support'

*Small Bases = less than 50

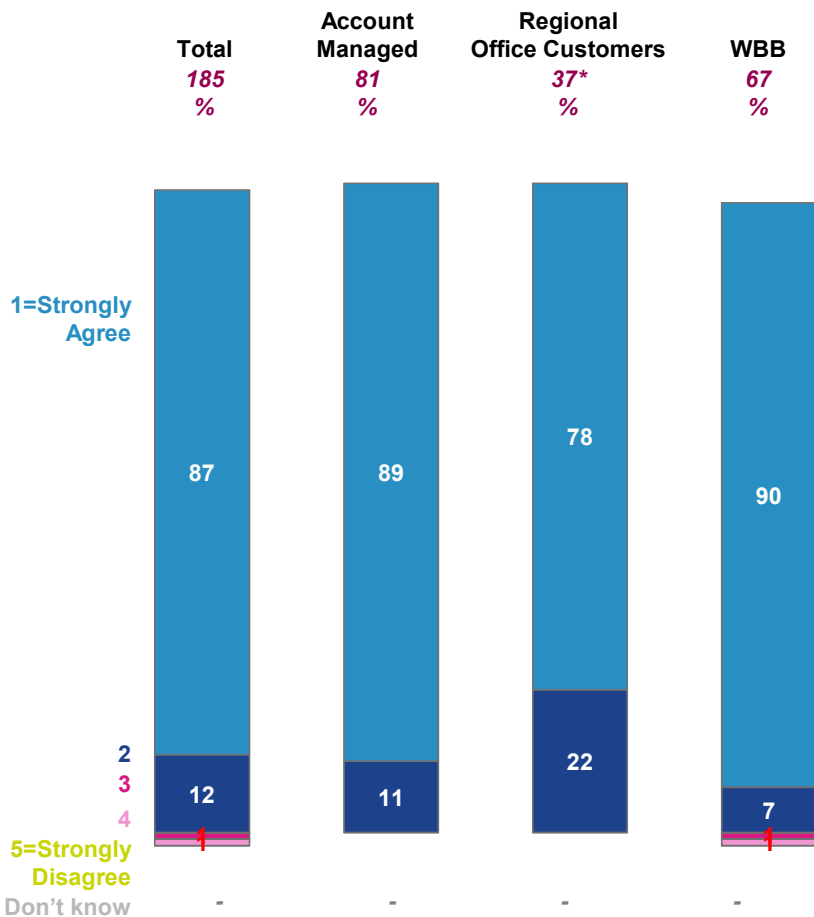




Key Performance Indicator – Process Management

'Were Polite and Friendly'

*Small Bases = less than 50



Segment

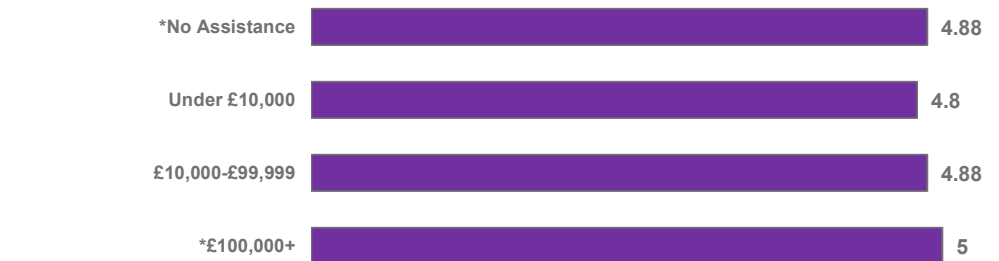
Mean Scores



Support Area



Assistance



Cognisense

Process Communication

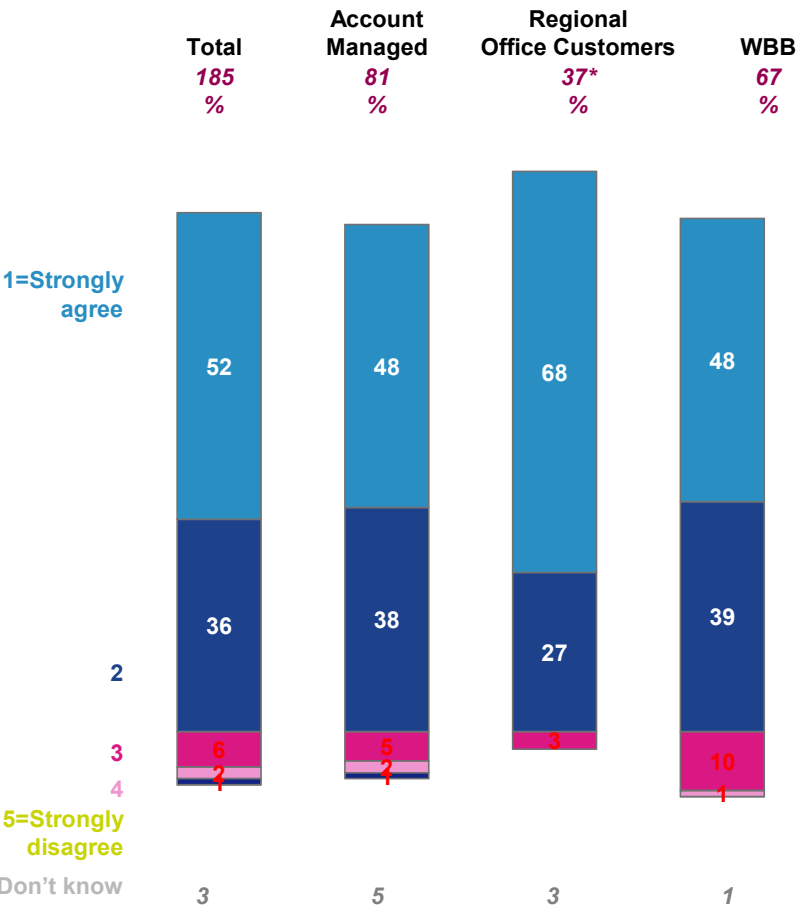




Key Performance Indicator – Process Communication

‘Kept you informed of progress throughout the process’

*Small Bases = less than 50

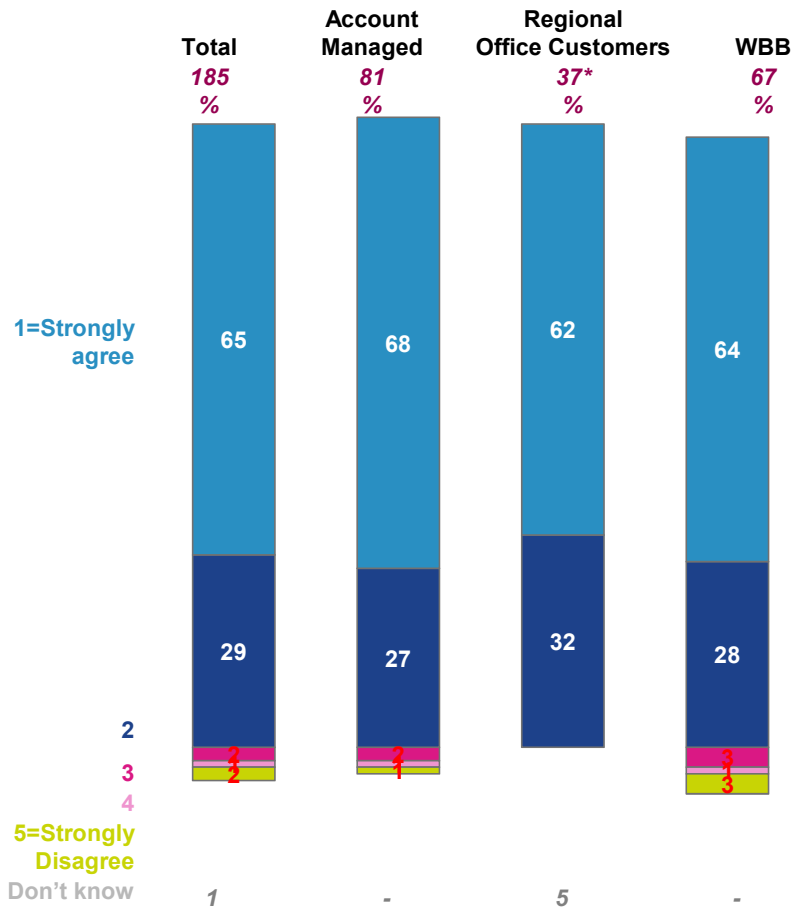




Key Performance Indicator – Process Communication

‘Responded to your queries within a reasonable timeframe’

*Small Bases = less than 50



Segment



Support Area



Assistance

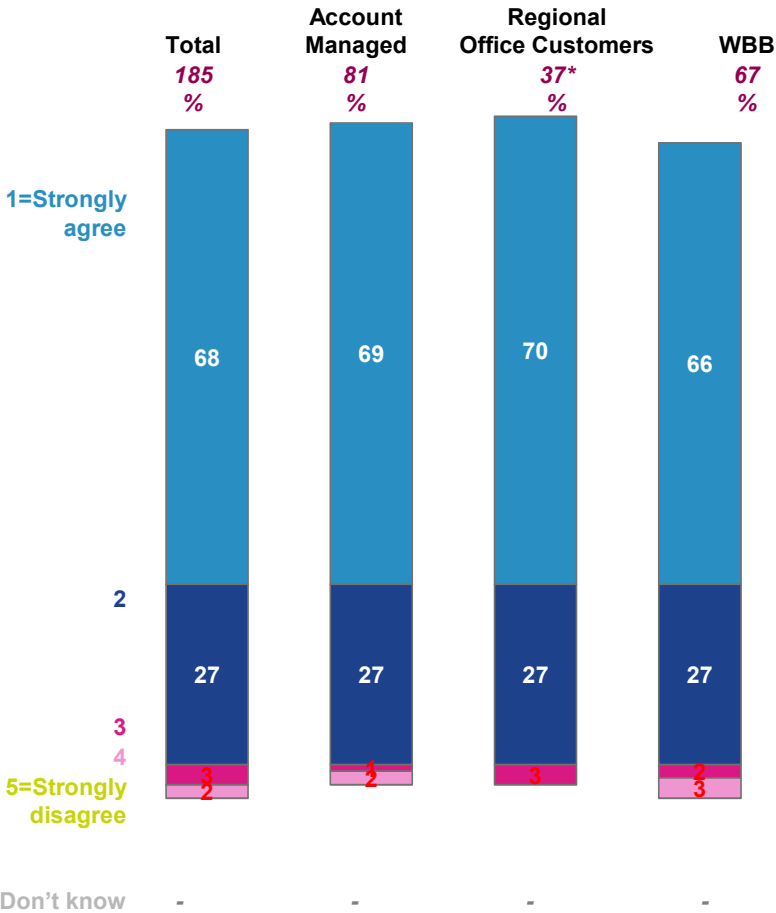




Key Performance Indicator – Process Communication

'Used clear and effective communication'

*Small Bases = less than 50



Segment



Support Area

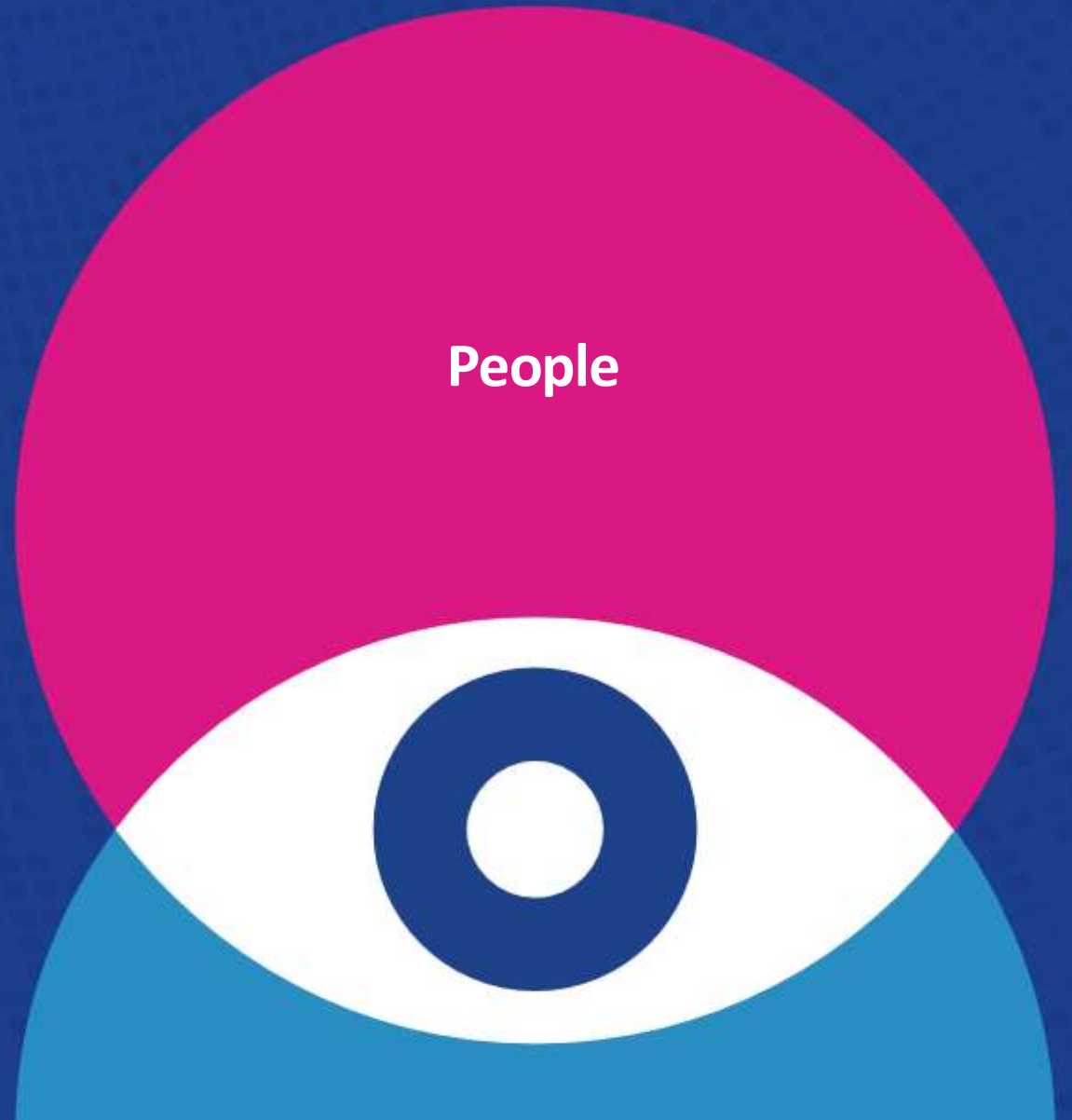


Assistance



Cognisense

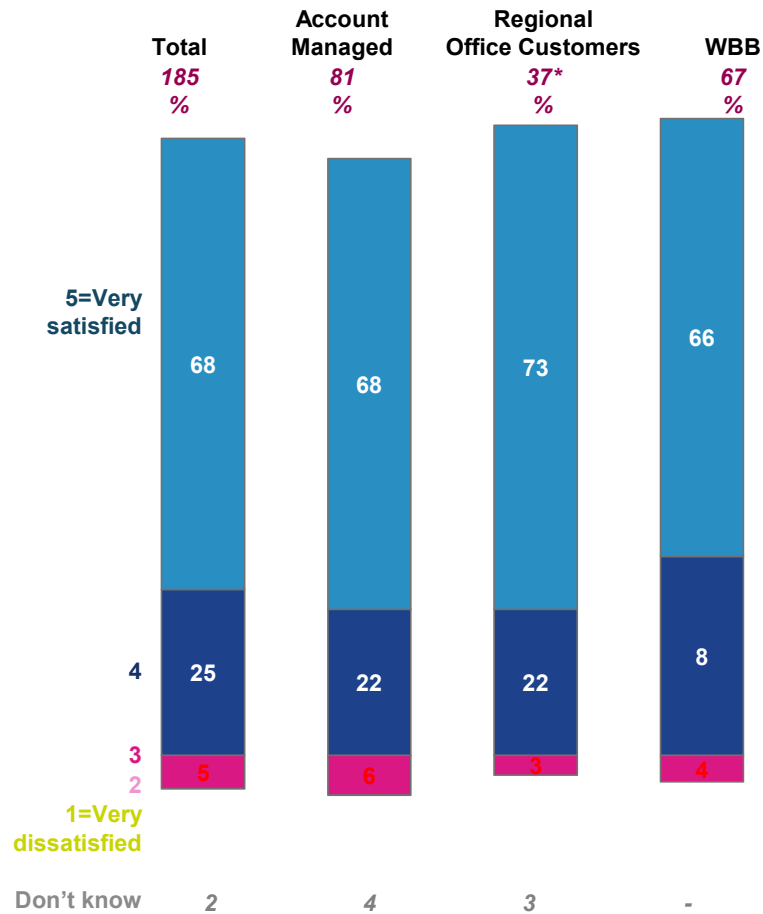
People



Key Performance Indicator – People

'Level of satisfaction with your Customer Executive/main Invest NI contact person'

*Small Bases = less than 50



Segment



Support Area



Assistance

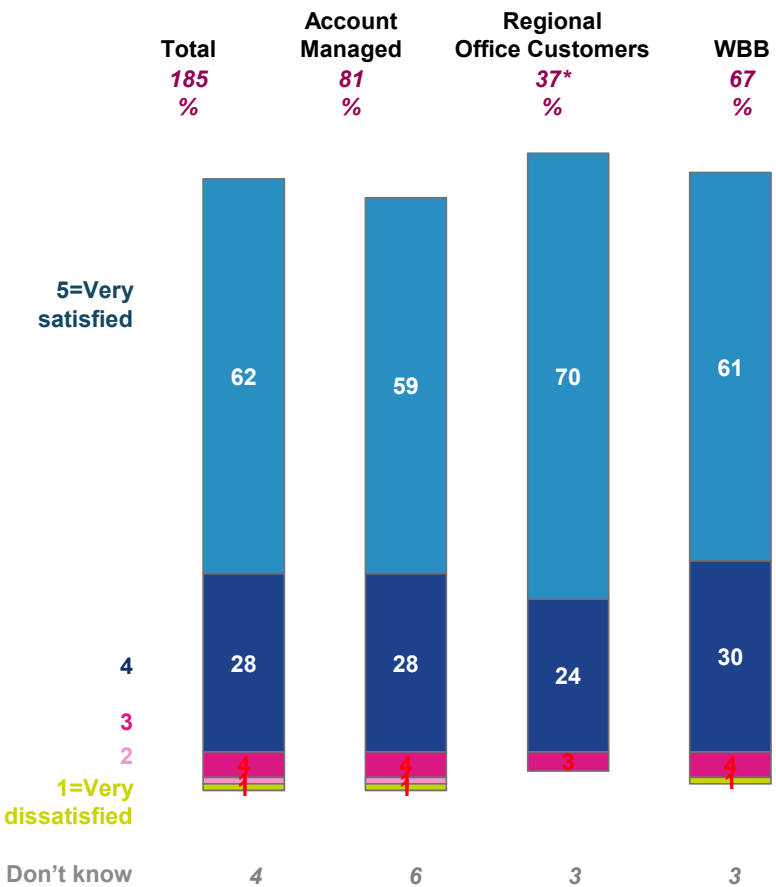




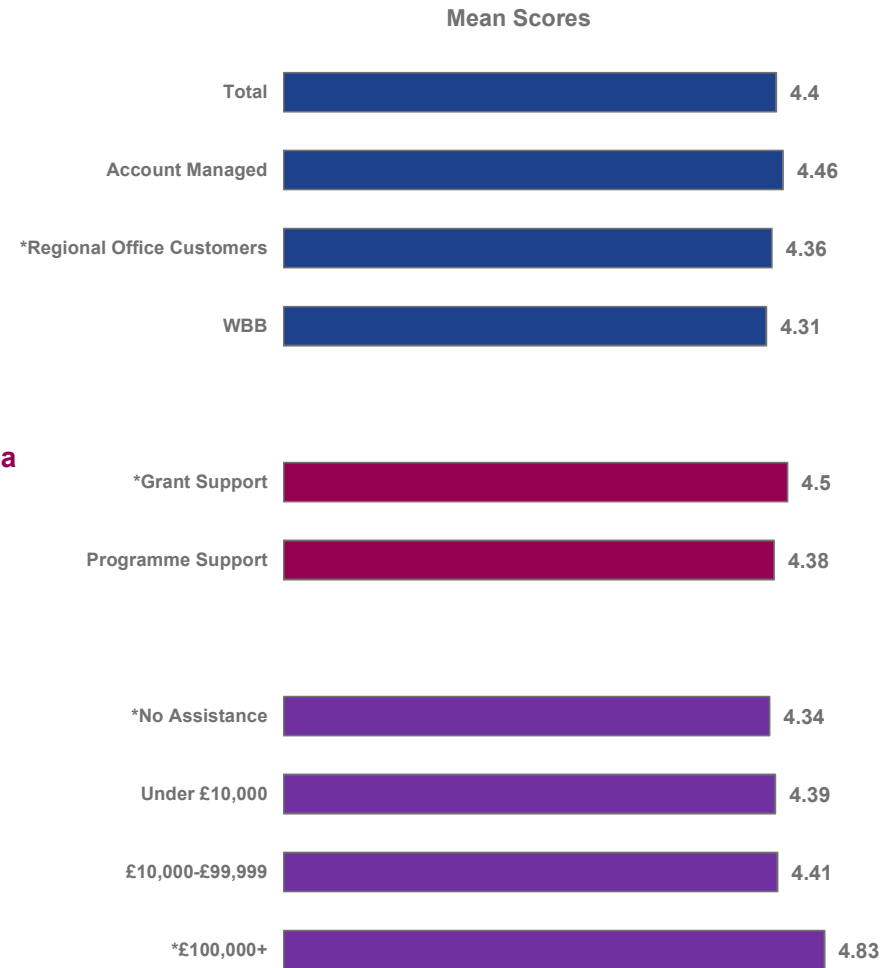
Key Performance Indicator – Process Communication

'Level of satisfaction that the team of people you worked with from Invest NI provided a seamless approach to your business during this engagement'

*Small Bases = less than 50

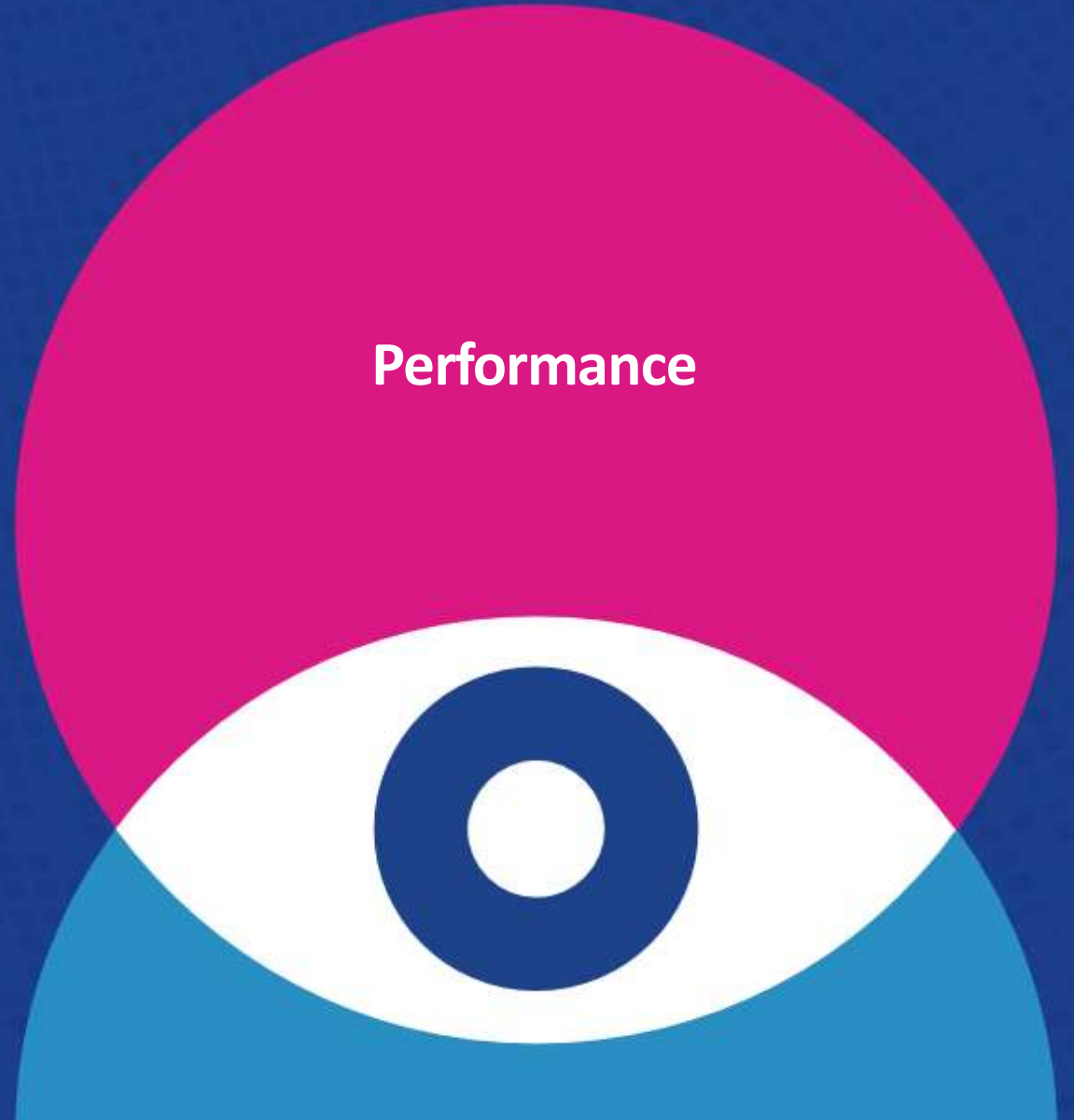


Segment



Cognisense

Performance

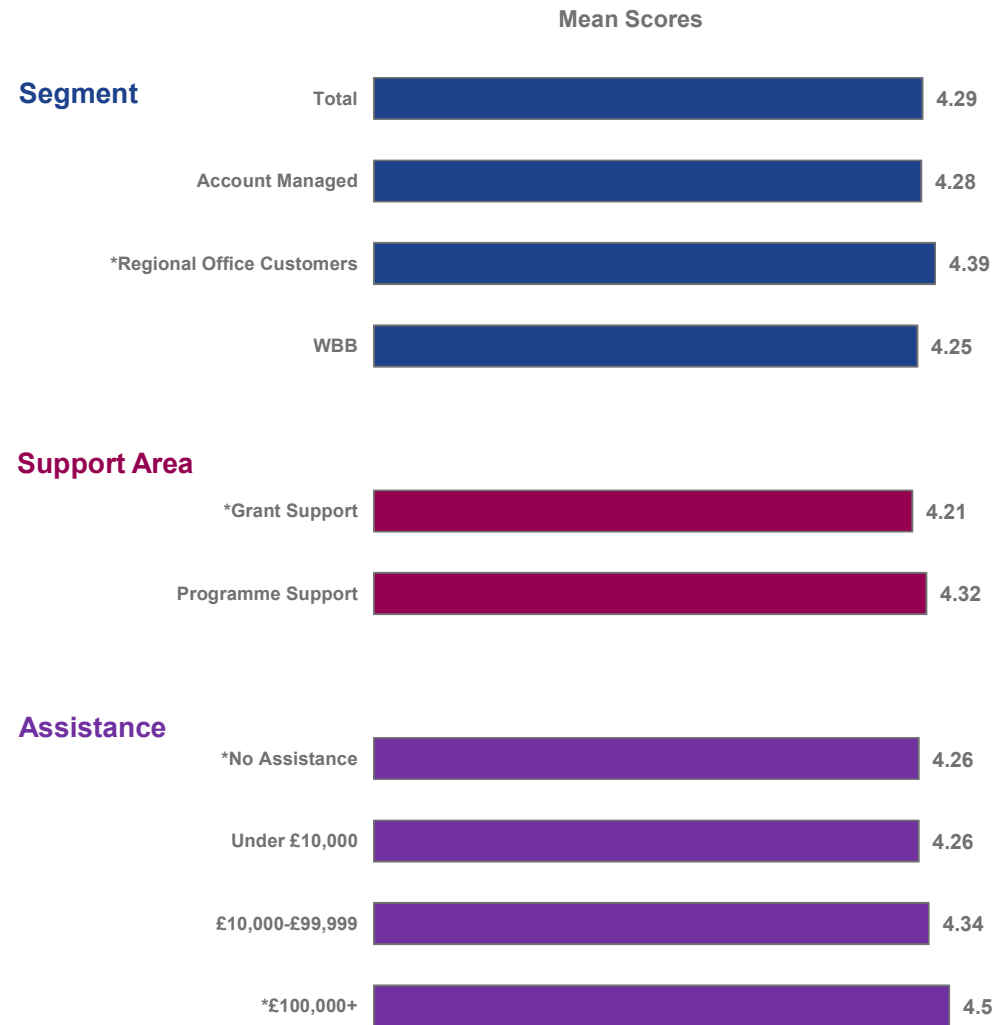
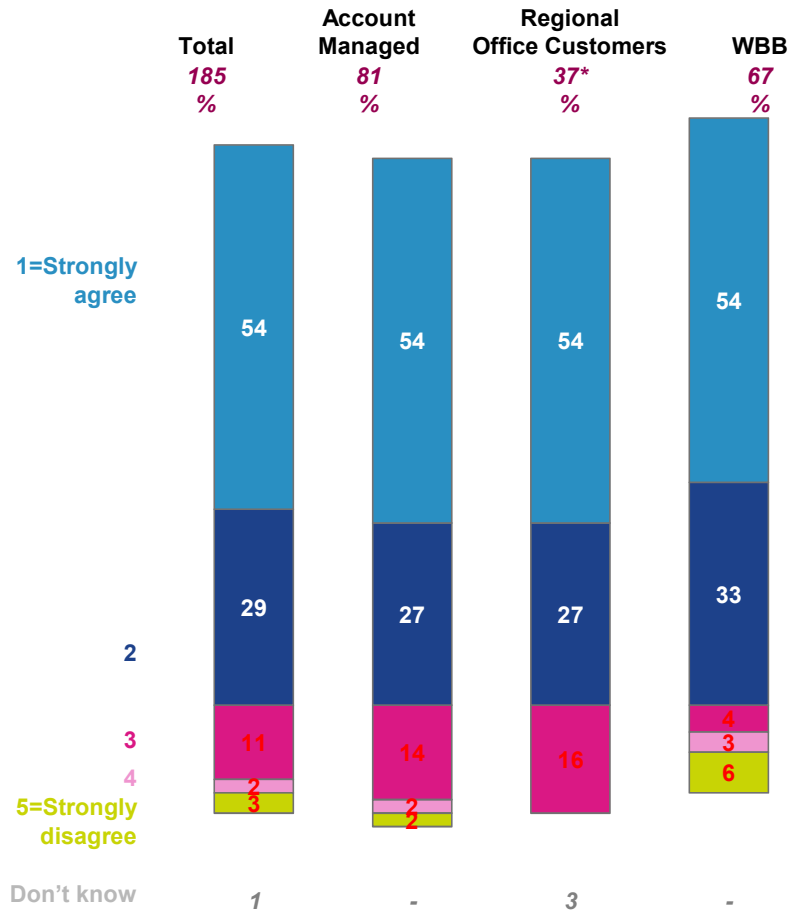




Key Performance Indicator – Performance

'The Invest NI team is helping to develop my business'

*Small Bases = less than 50

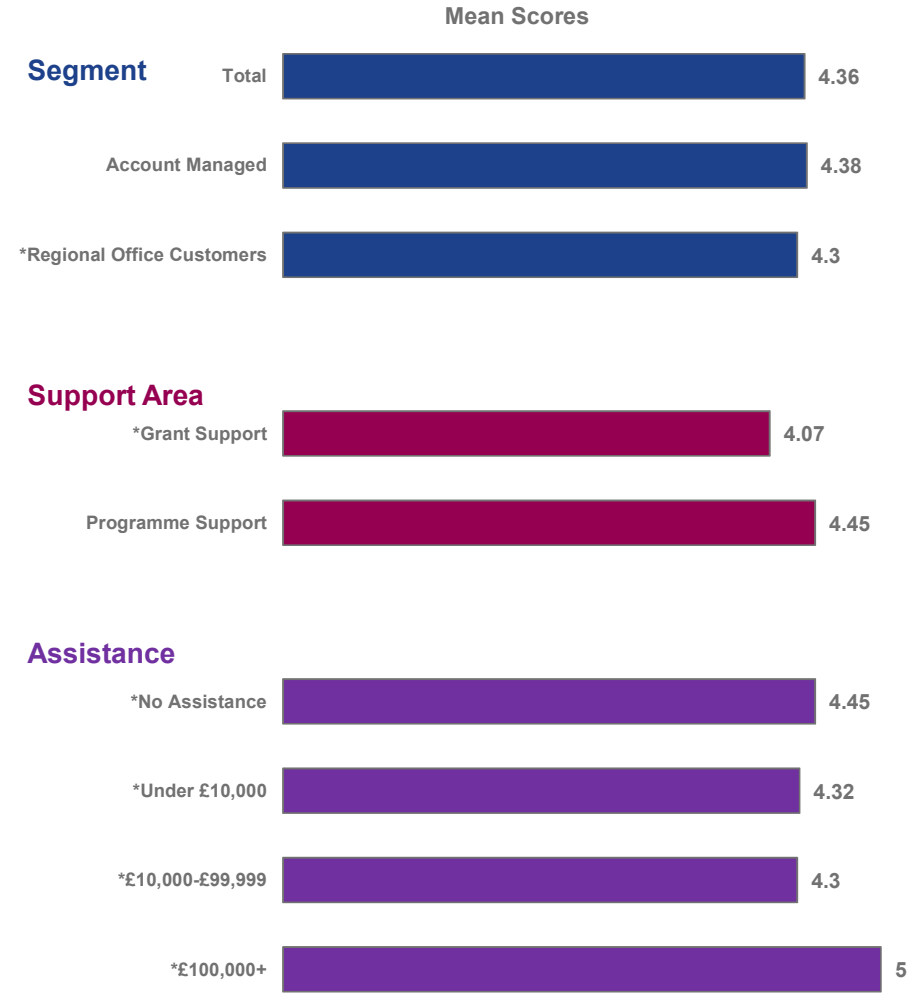
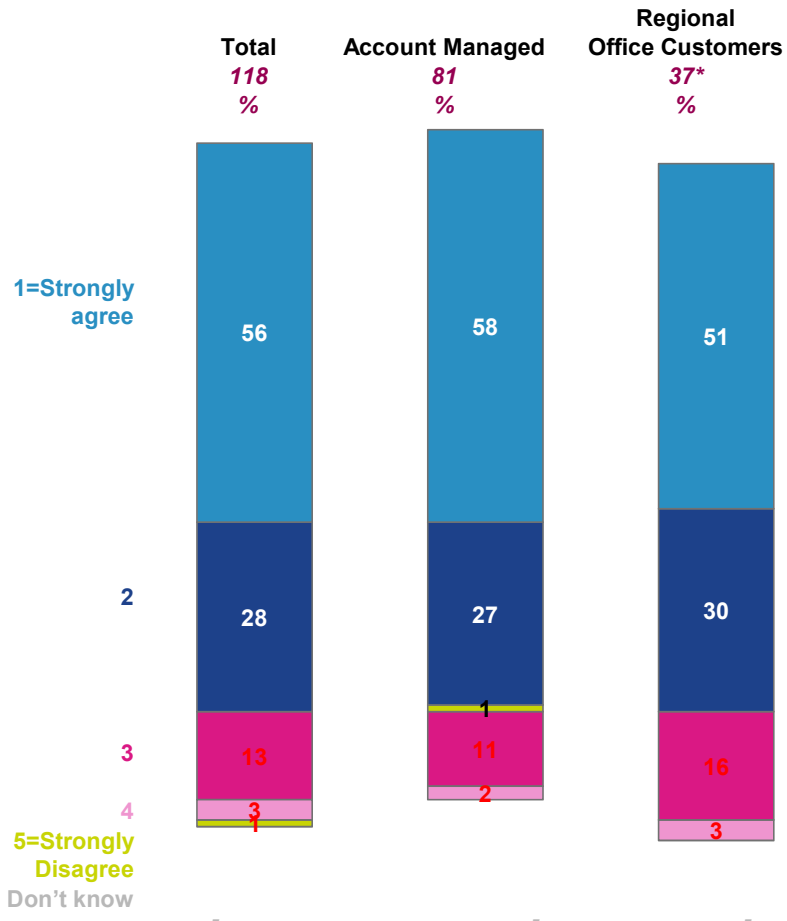




Key Performance Indicator – Performance

'I view Invest NI as a strategic partner supporting my business'

*Small Bases = less than 50

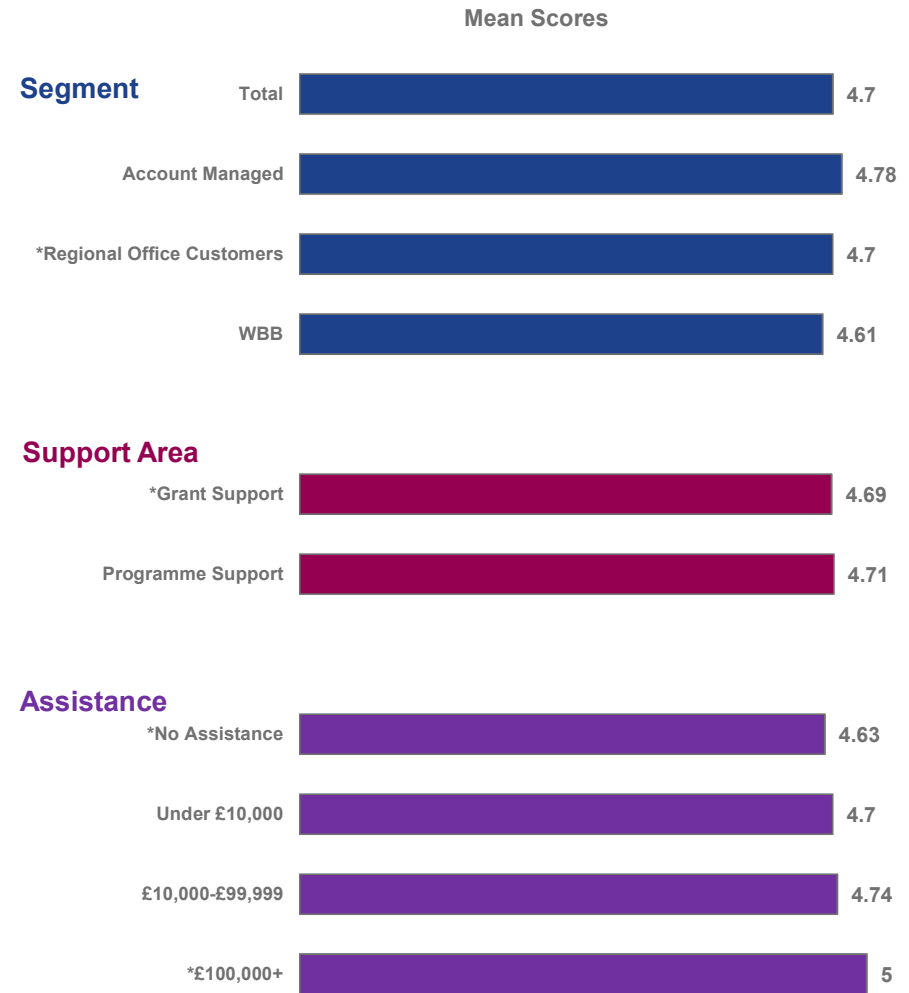
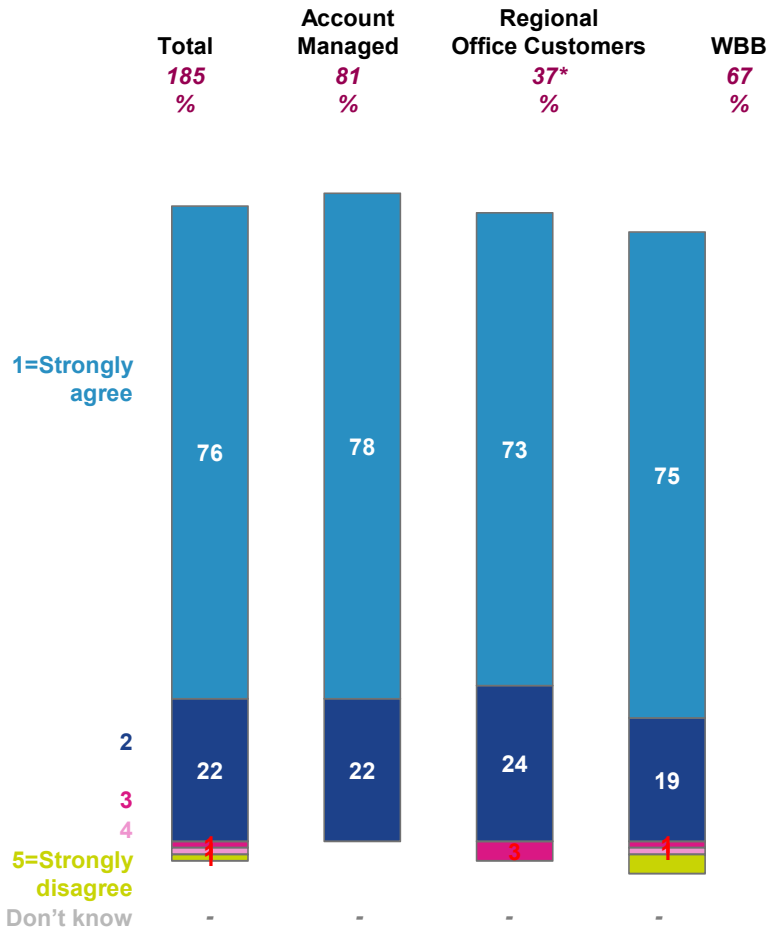




Key Performance Indicator – Performance

‘Invest NI acts with professionalism and integrity’

*Small Bases = less than 50

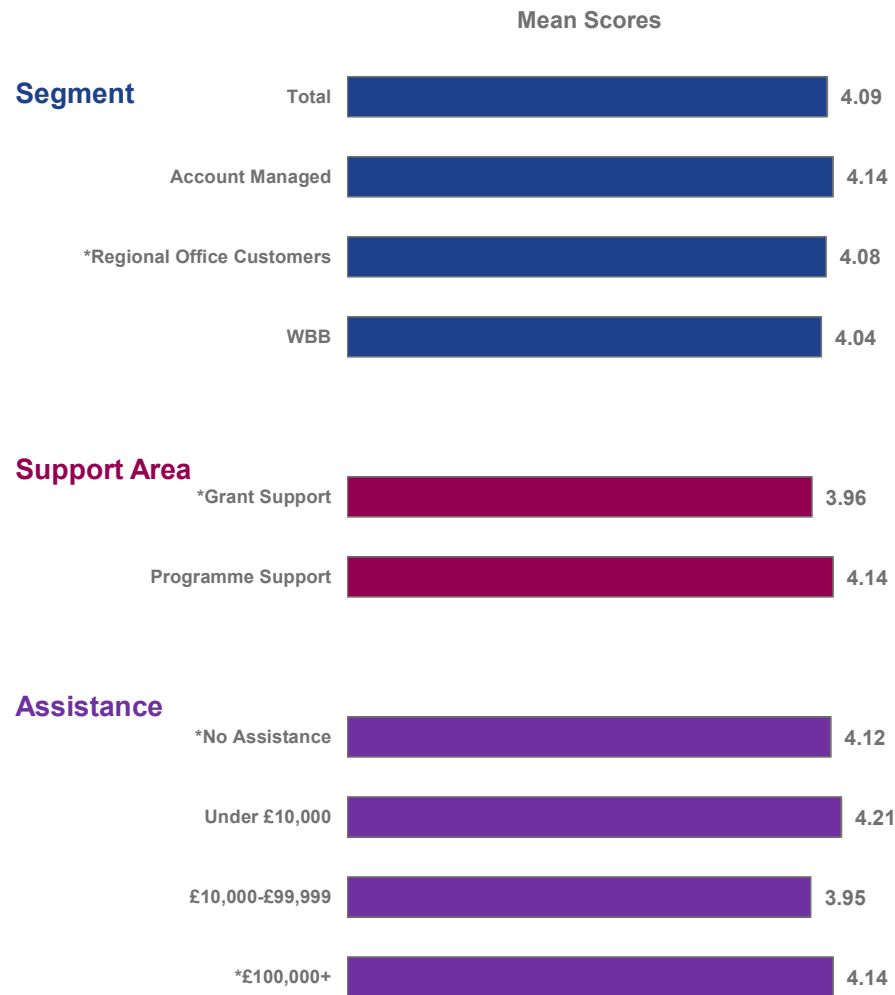
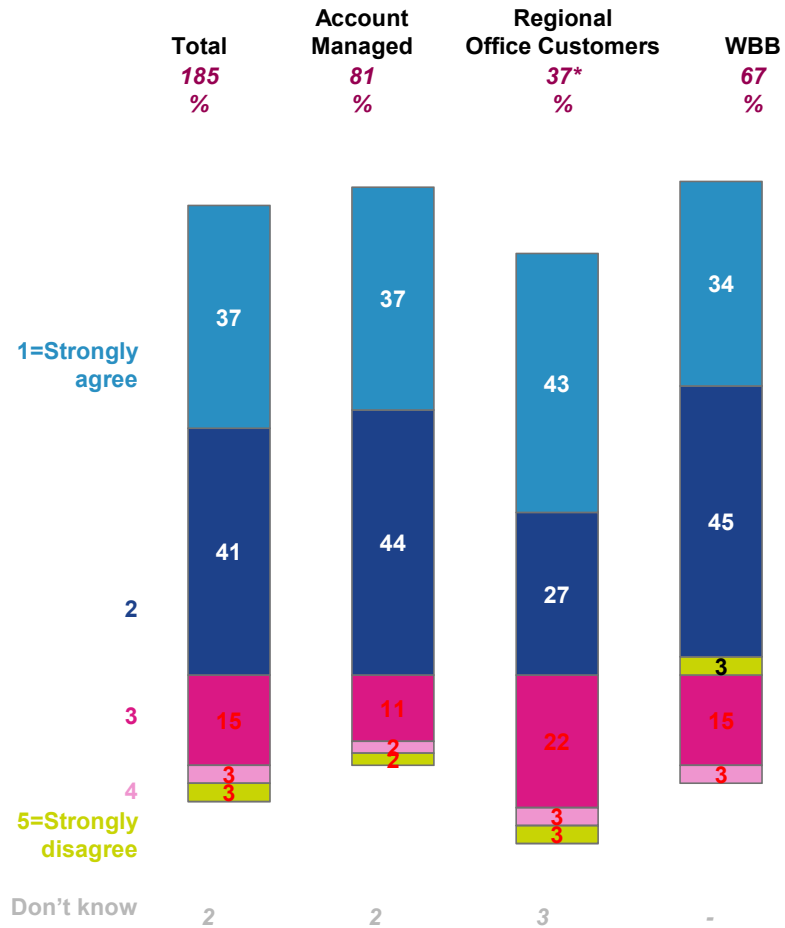




Key Performance Indicator – Performance

‘Invest NI exceeded my expectations’

*Small Bases = less than 50

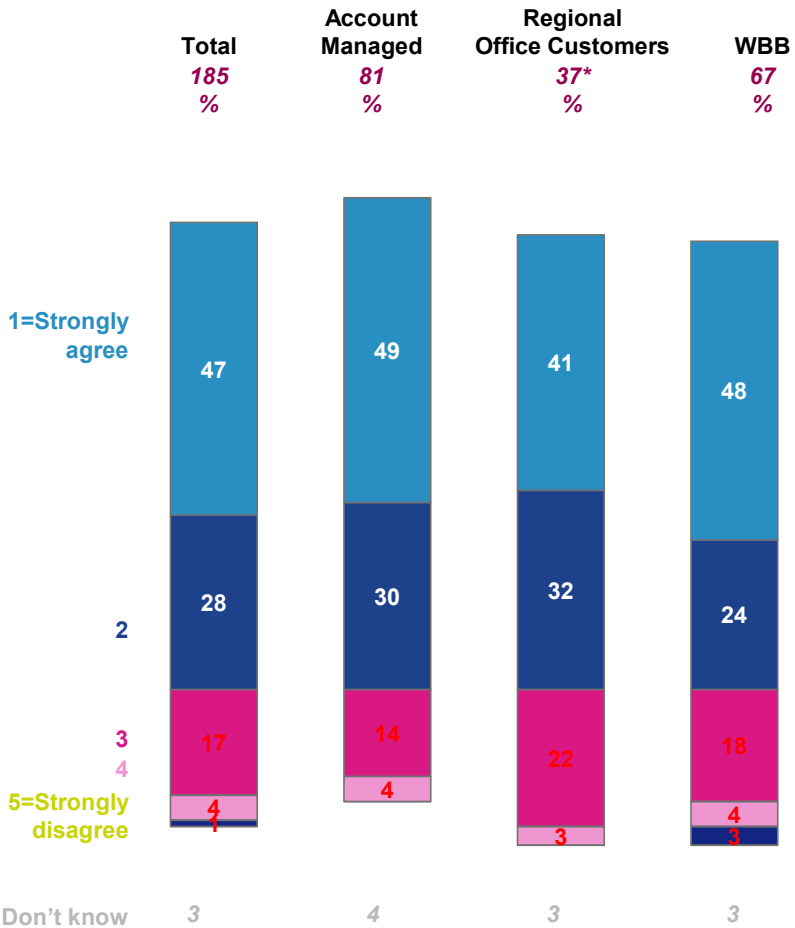


Key Performance Indicator – Performance



'I received information on additional support programmes that are available from Invest NI'

*Small Bases = less than 50

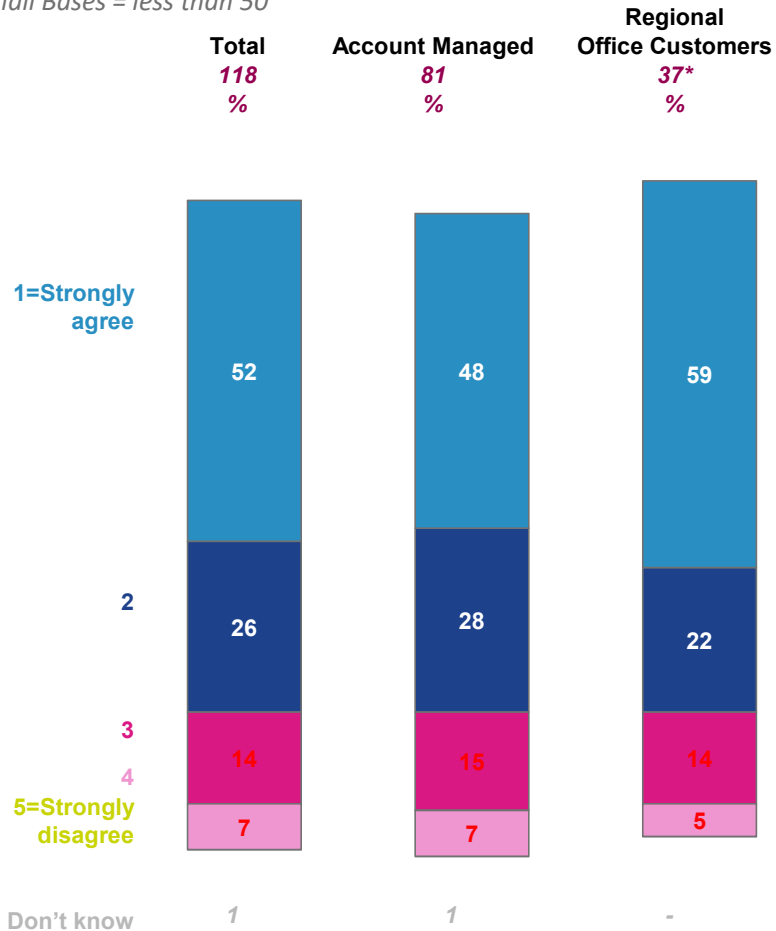




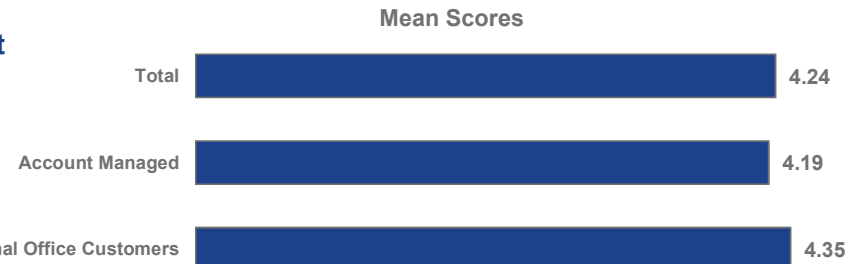
Key Performance Indicator – Performance

‘I am clear on my business development journey with Invest NI in terms of future support services that I am considering using’

*Small Bases = less than 50



Segment



Support Area



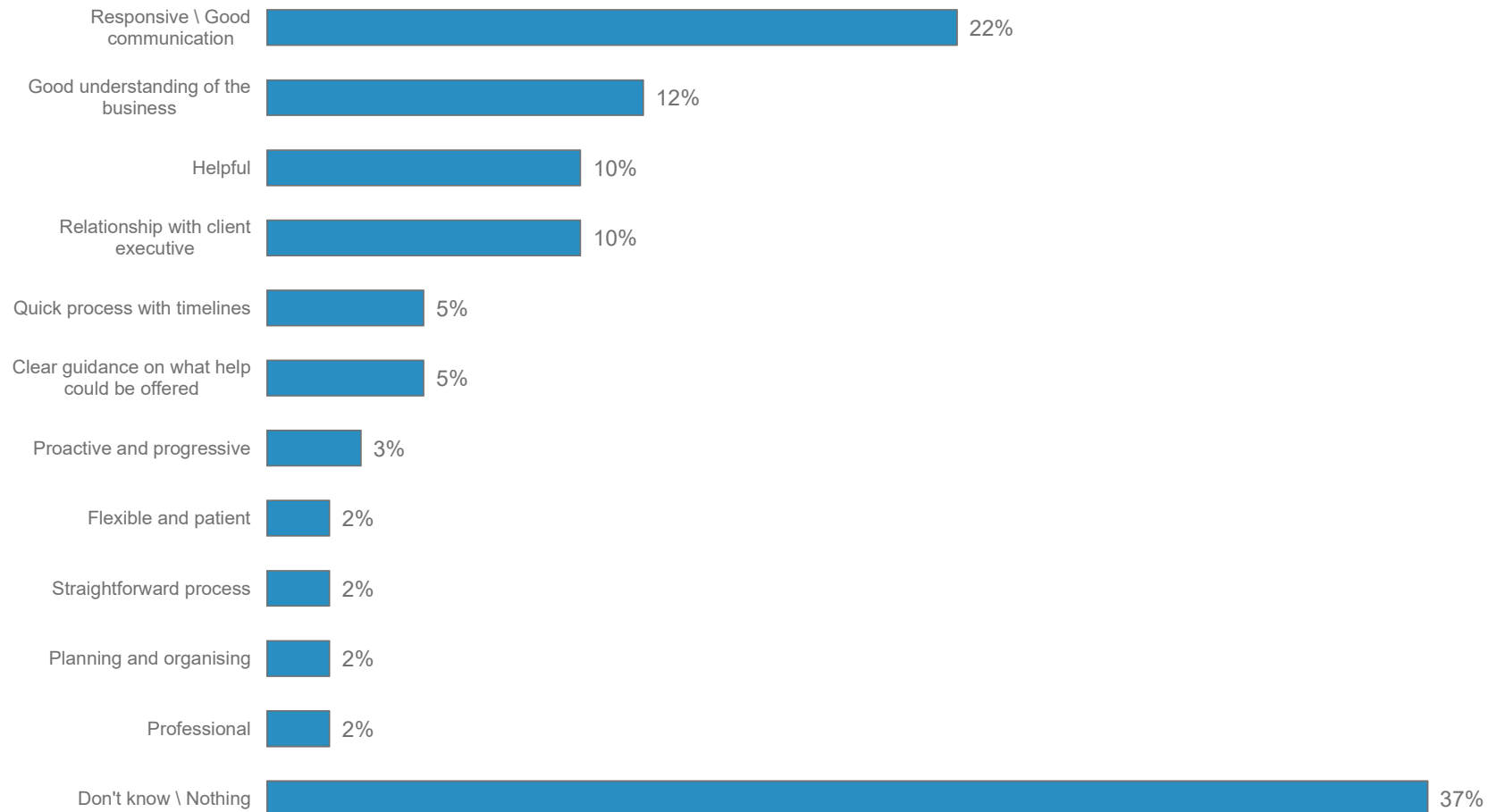
Assistance





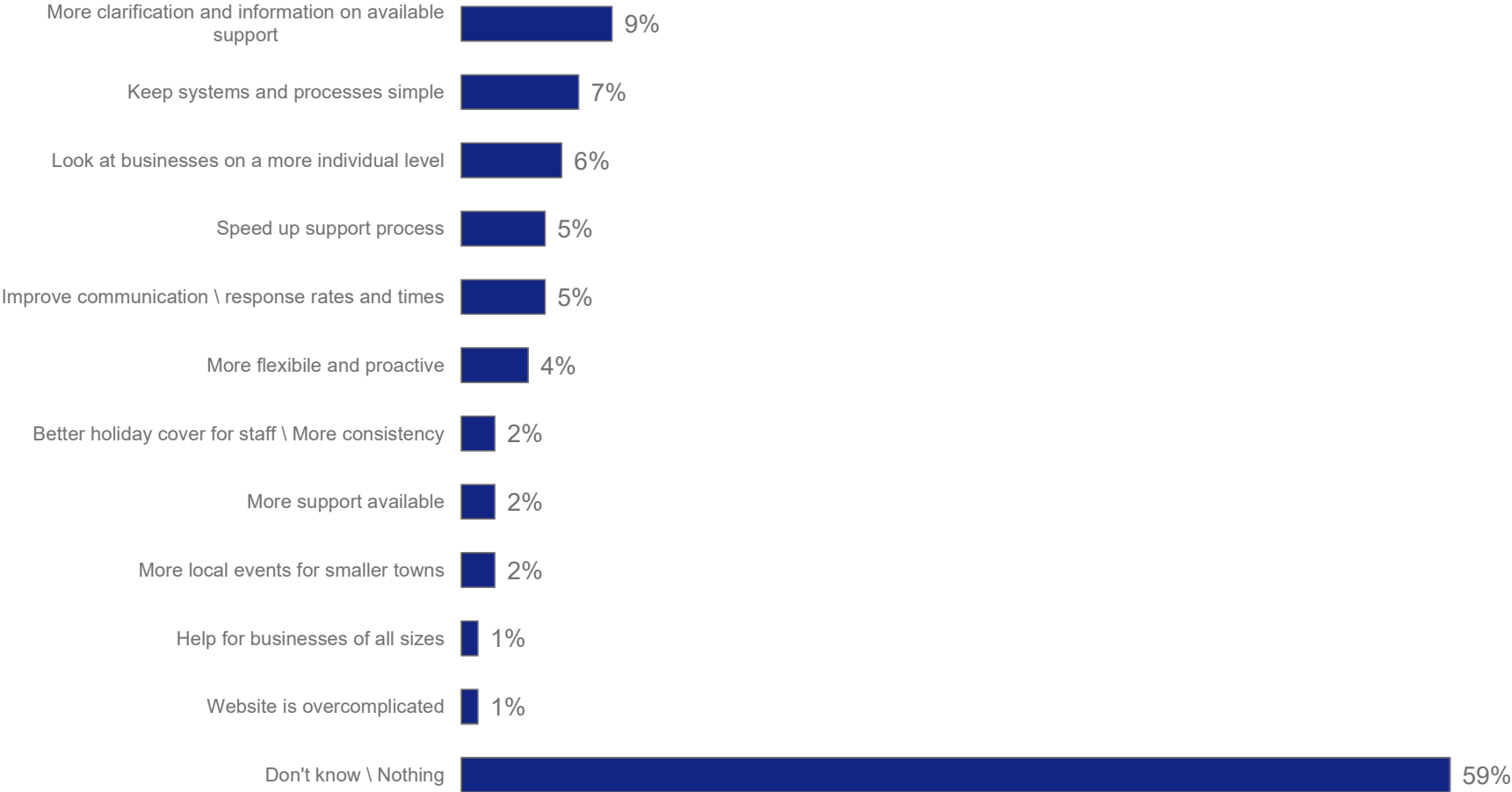
Key Performance Indicator – Performance

‘What Invest NI did particularly well’



Key Performance Indicator – Performance

‘Anything organisation could do to improve the overall service they provide’





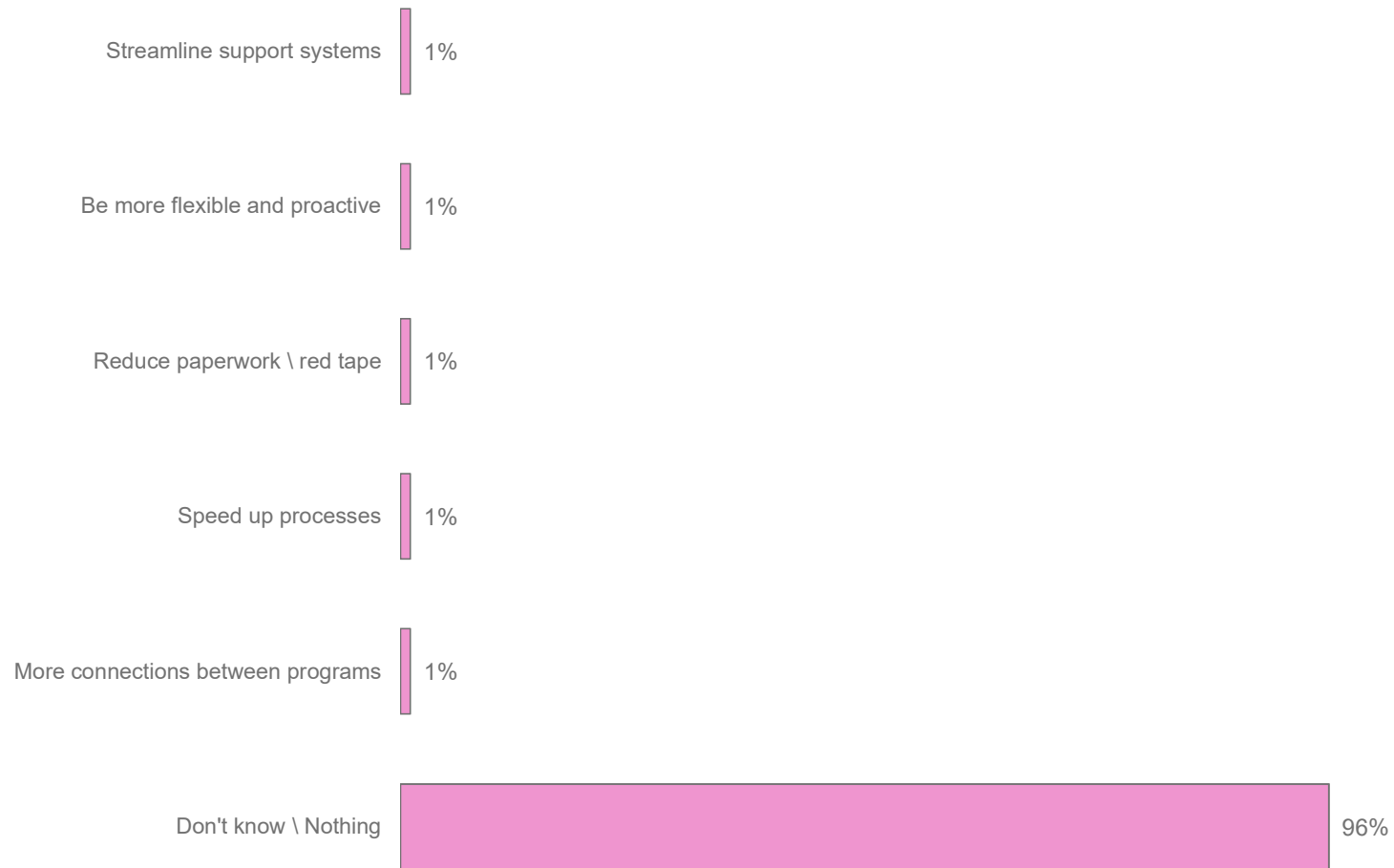
Key Performance Indicator – Performance

‘Anything organisation could have done better’

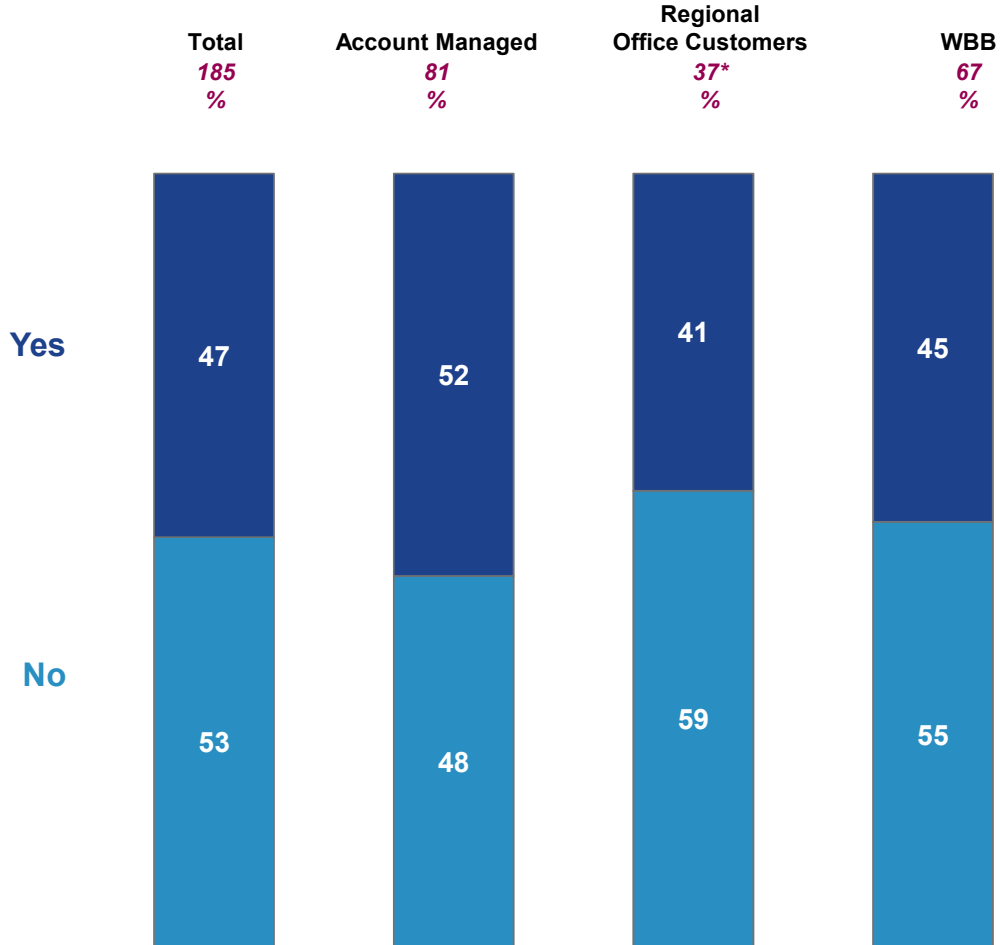


Key Performance Indicator – Performance

'Anything organisation could have done differently'



Actively Discussing Application for Additional Support



Cognisense

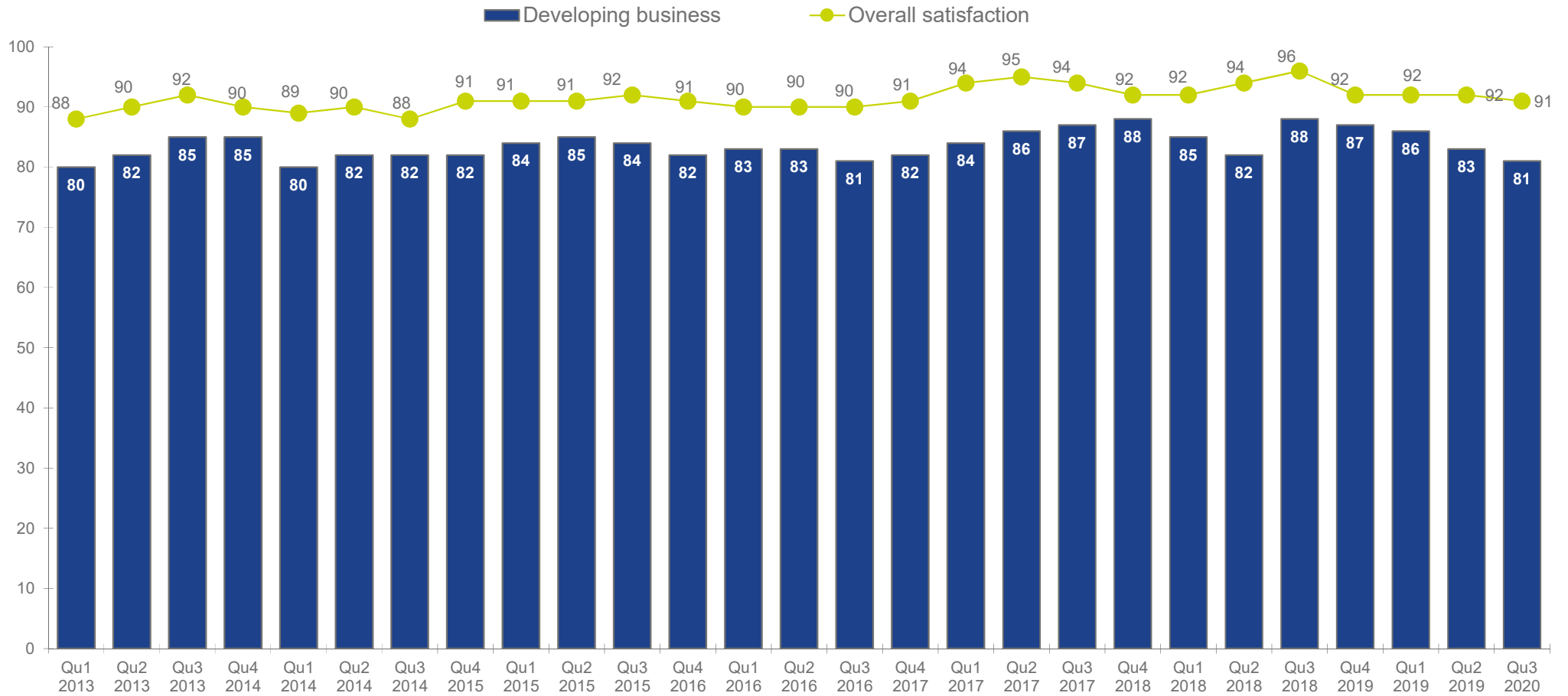
Rolling Average

A stylized eye graphic is positioned on the right side of the image. The upper eyelid is a large, solid pink circle. The lower eyelid is a large, solid blue circle. The iris is a white circle with a dark blue ring and a white center. The text 'Rolling Average' is written in white, sans-serif font across the pink upper eyelid.

Satisfaction and key driver variables: INI is helping to develop my business



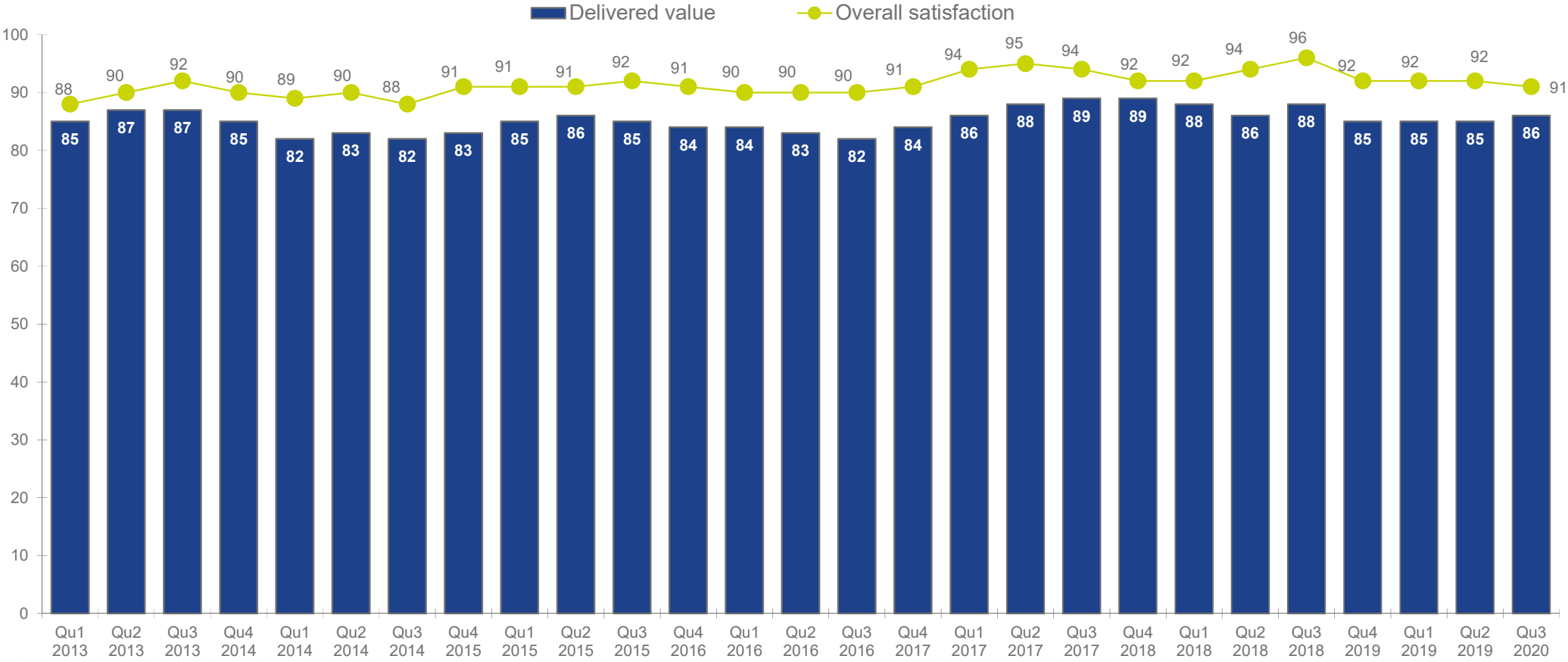
Six month rolling average



Satisfaction and key driver variables: INI delivered value to my business



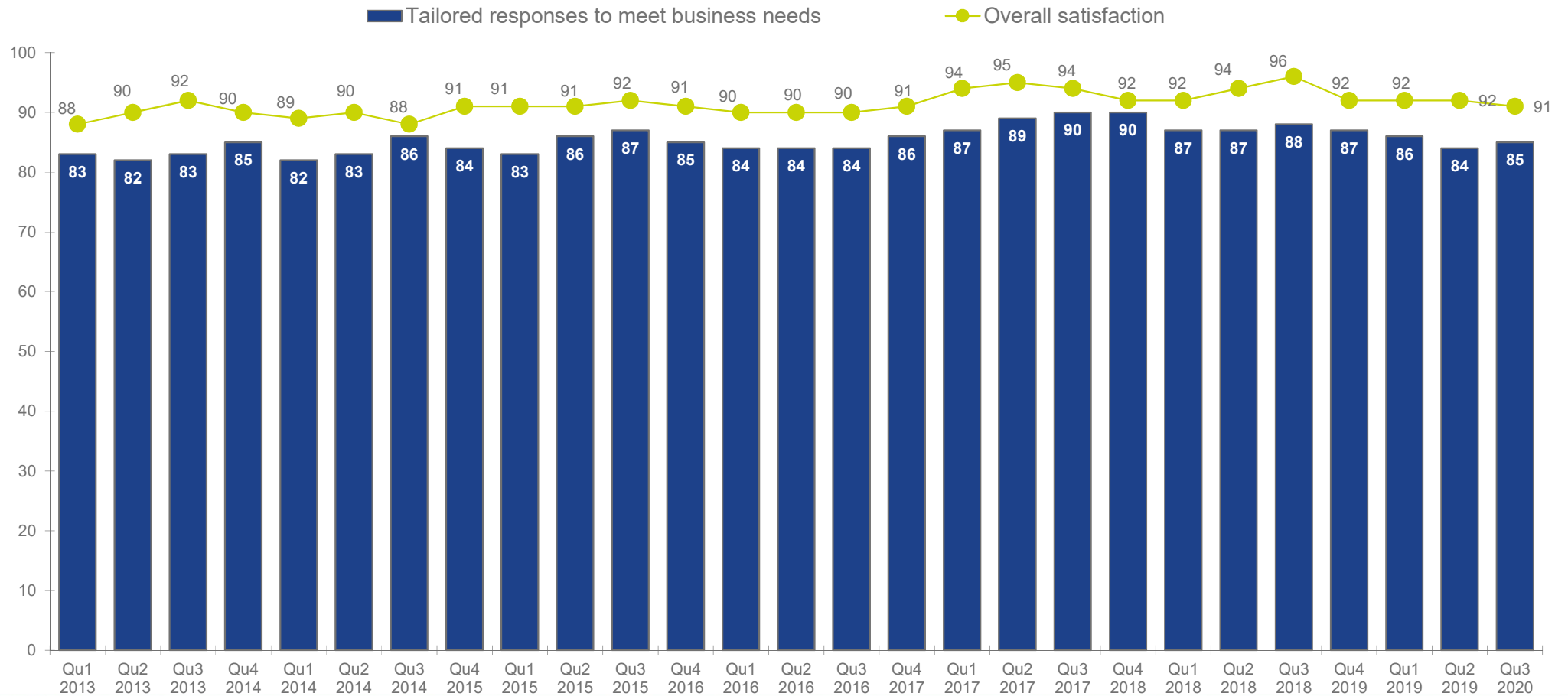
Six month rolling average



Satisfaction and key driver variables: INI tailored their responses to meet your business needs



Six month rolling average

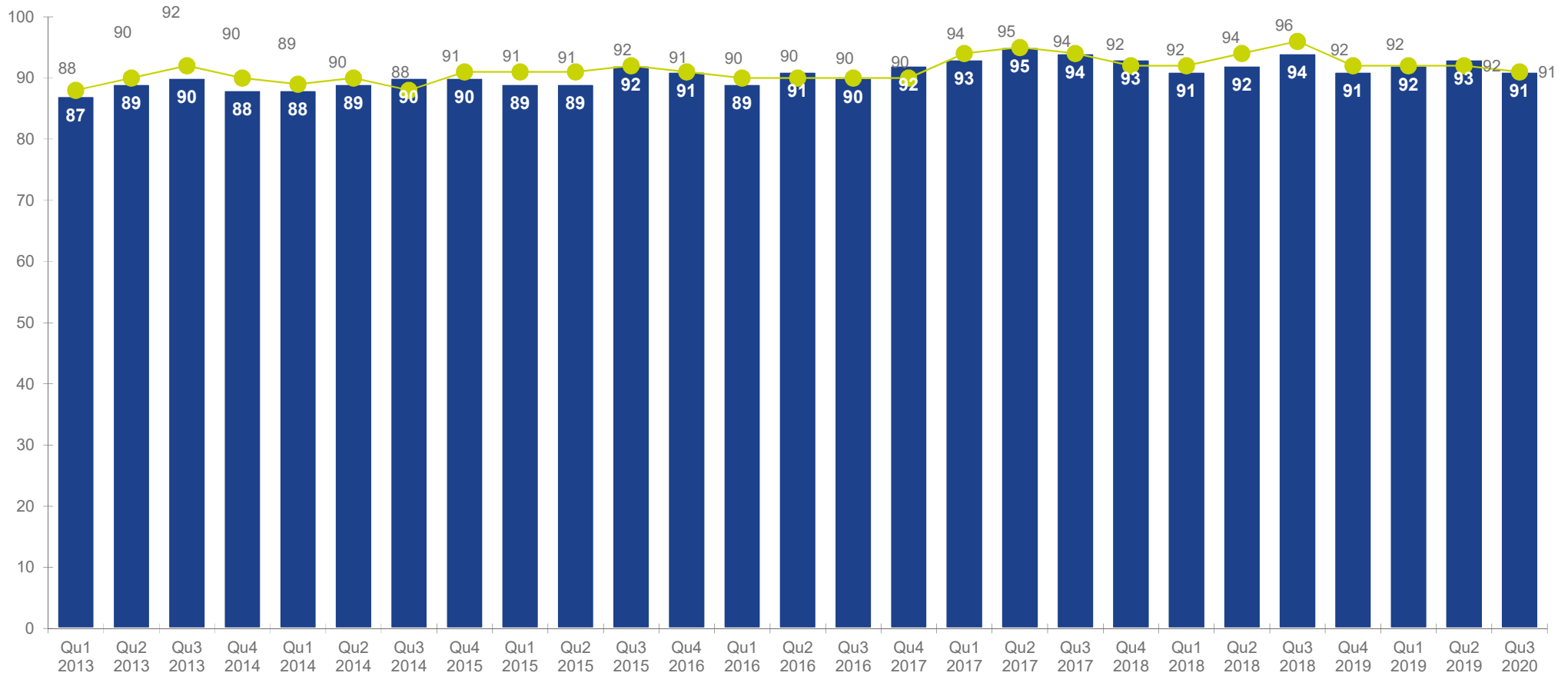


Satisfaction and key driver variables: Satisfaction with Client Executive

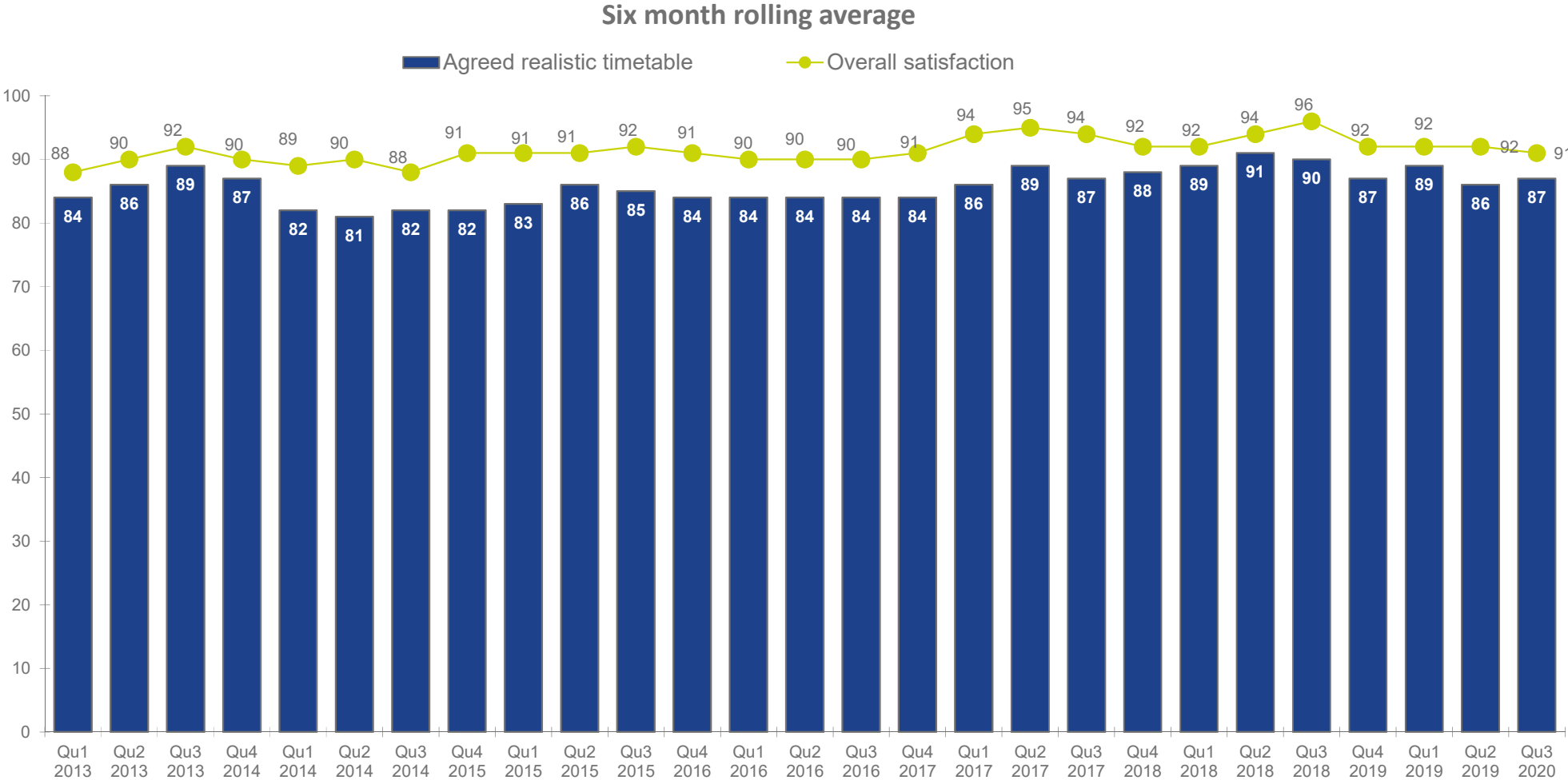


Six month rolling average

■ Satisfaction with Customer Executive ● Overall satisfaction



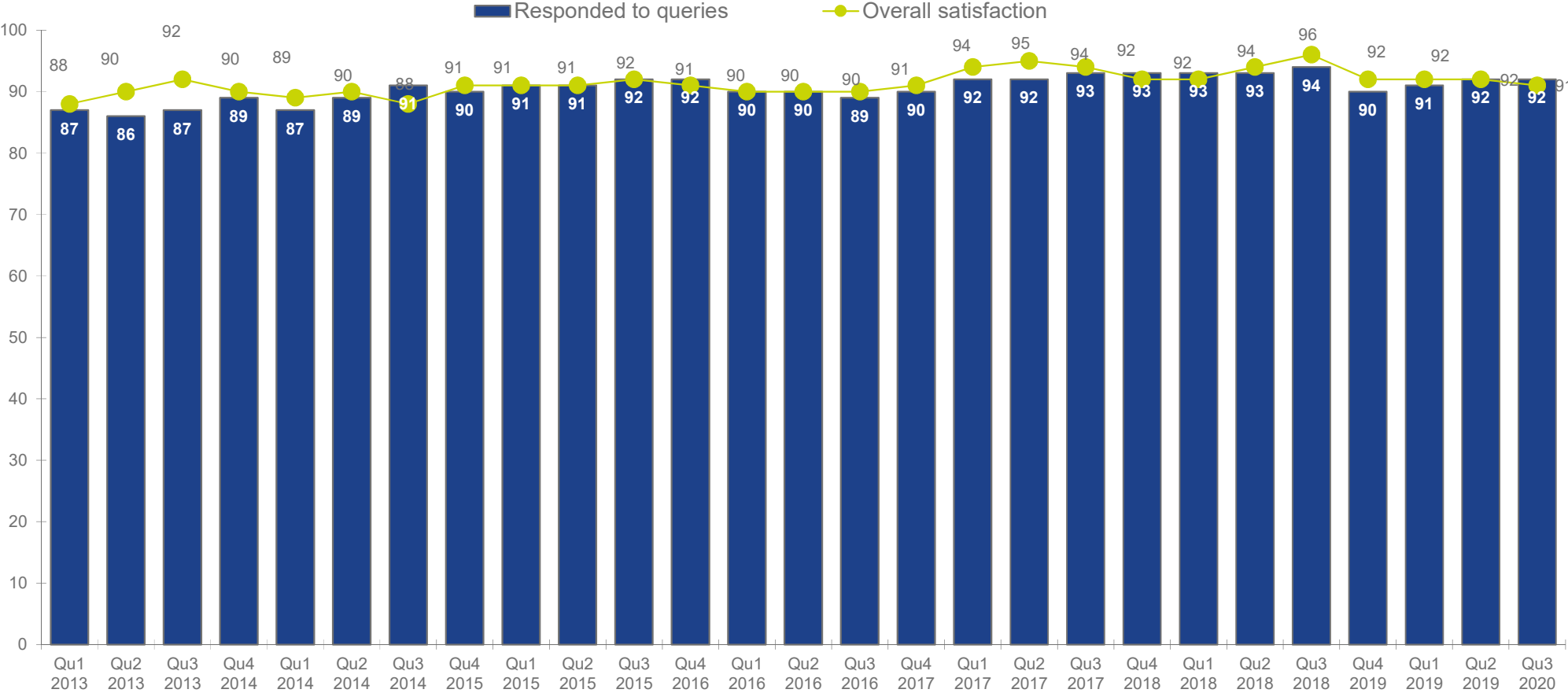
Satisfaction and key driver variables: INI discussed and agreed a realistic timetable for planned activities



Satisfaction and key driver variables: INI responded to your queries within a reasonable timeframe



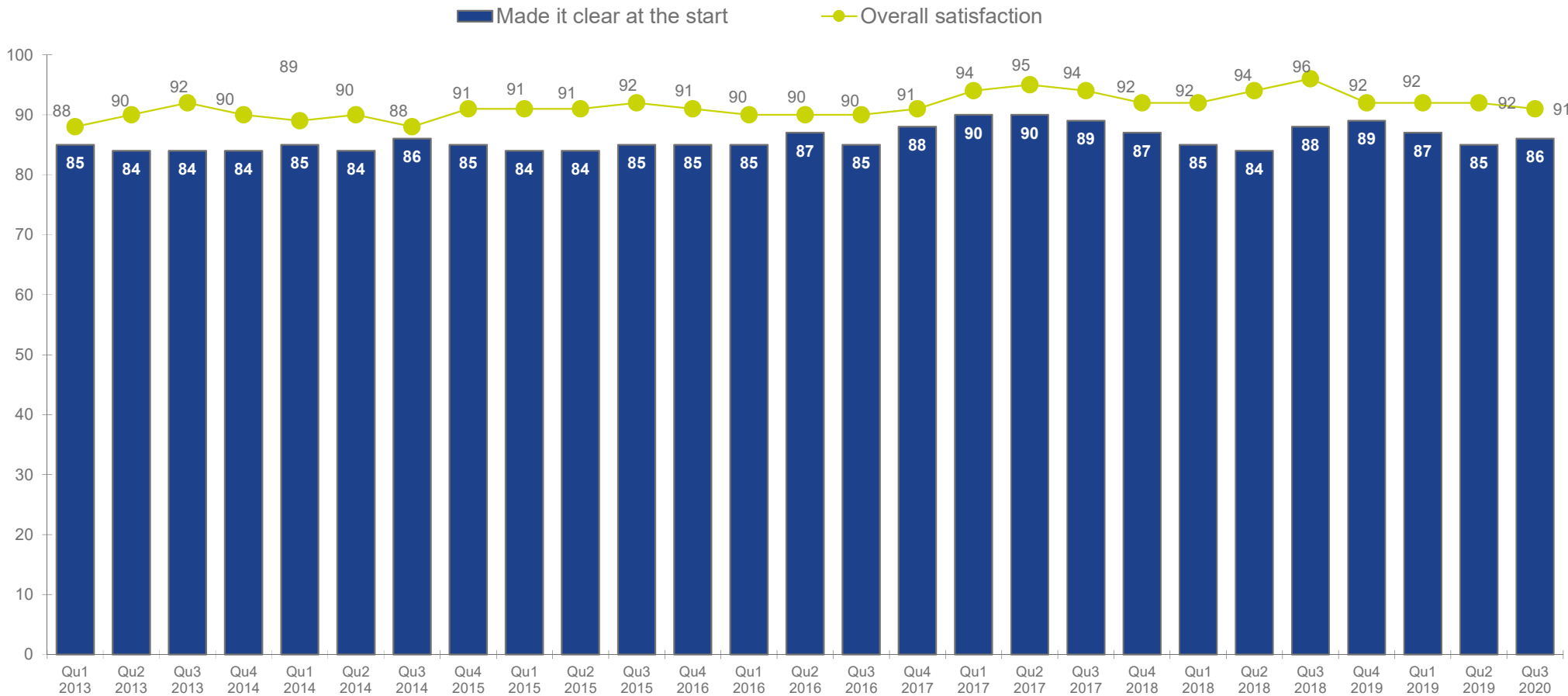
Six month rolling average



Satisfaction and key driver variables: INI made it clear at the start if and how they could assist your business



Six month rolling average



Cognisense

Detailed Performance Measures





Performance Overall

Customers



Process - Management



Process - Communication



Average Rating	
Nov-Mar '17	4.46
Apr-Jun'17	4.45
Jul-Sep'17	4.47
Oct-Dec'17	4.48
Jan-Mar-'18	4.47
Apr-Jun'-18	4.47
Jul-Sept'18	4.45
Oct-Dec'18	4.44
Jan-Mar'19	4.45
Apr-Jun'19	4.53
Jul-Sept'19	4.35
Oct-Dec'19	4.48

■ Oct-Dec

Performance by Segment: Account Managed Customers

Base = 81

Customers



Process - Management



Process - Communication



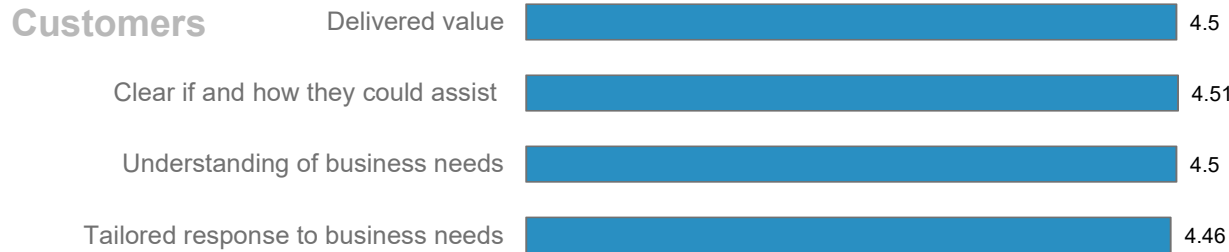
Average Rating	
Nov-Mar '17	4.51
Apr-Jun'17	4.60
Jul-Sep'17	4.53
Oct-Dec'17	4.53
Jan-Mar'18	4.48
Apr-Jun'18	4.37
Jul-Sept'18	4.51
Oct-Dec'18	4.49
Jan-Mar'19	4.52
Apr-Jun'19	4.54
Jul-Sept'19	4.38
Oct-Dec'19	4.49

■ Oct-Dec



Performance by Segment: Regional Office Customers

Base = 37*



Process - Management



Process - Communication



Average Rating	
Nov-Mar '17	4.41
Apr-Jun'17	4.42
Jul-Sep'17	4.49
Oct-Dec'17	4.36
Jan-Mar'18	4.48
Apr-Jun'18	4.60
Jul-Sept'18	4.4
Oct-Dec'18	4.45
Jan-Mar'19	4.44
Apr-Jun'19	4.49
Jul-Sept'19	4.38
Oct-Dec '19	4.55

■ Oct-Dec

Performance by Segment: Wider Business Base

Base = 67



Customers



Process - Management



■ Oct-Dec

Process - Communication



Average Rating	
Nov-Mar '17	4.48
Apr-Jun '17	4.18
Jul-Sep '17	4.26
Oct-Dec '17	4.50
Jan-Mar '18	4.23
Apr-Jun '18	4.29
Jul-Sept '18	4.51
Oct-Dec '18	4.29
Jan-Mar '19	4.32
Apr-Jun '19	4.68
Juk-Sept '19	4.24
Oct-Dec '19	4.44