



Methodology

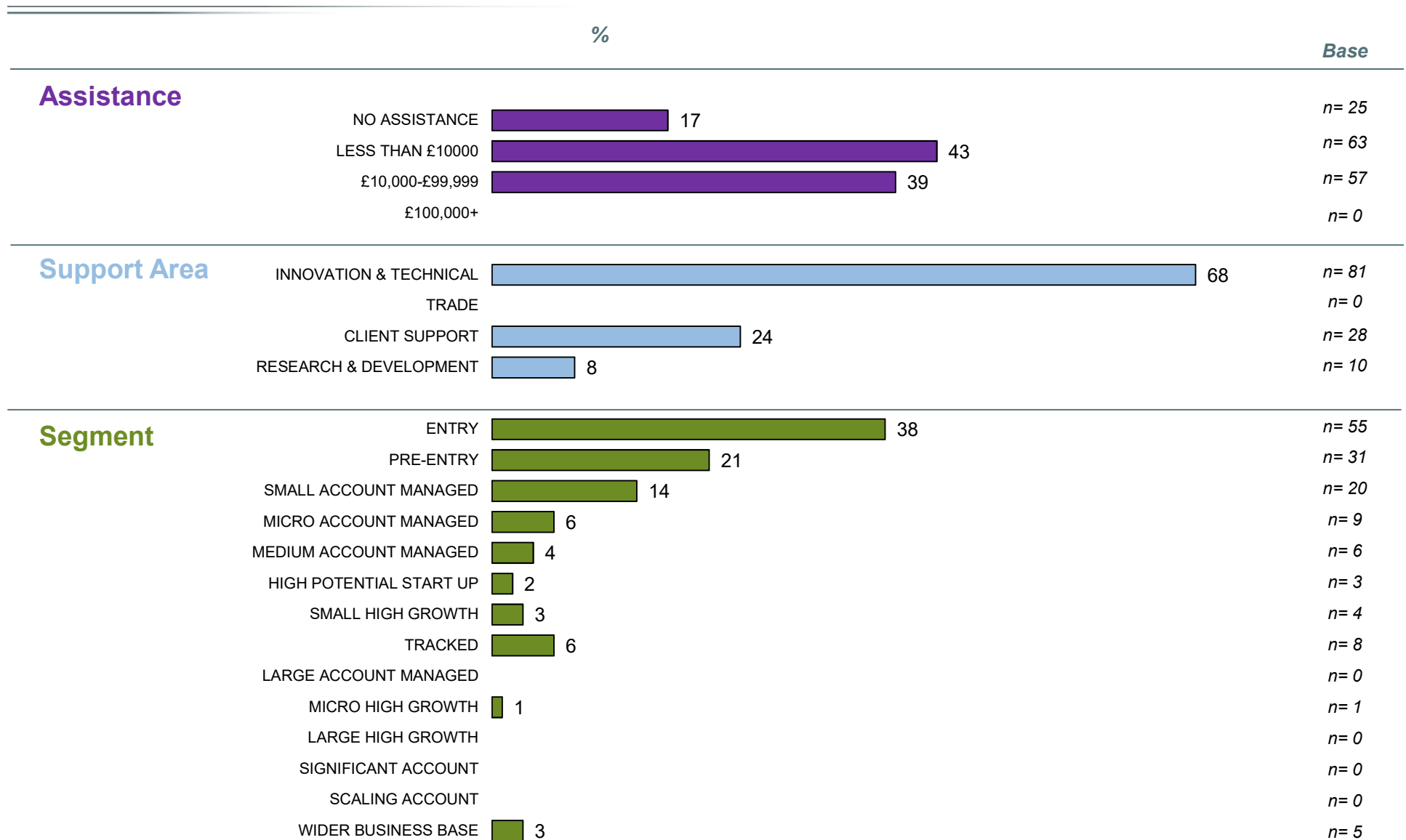
- In conducting this research a telephone methodology was employed. The 10 minute questionnaire had been utilised for many years and remained consistent to enable comparisons with previous waves.
- Throughout the fieldwork period, Millward Brown interviewers worked under direct supervision, with approximately 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.**



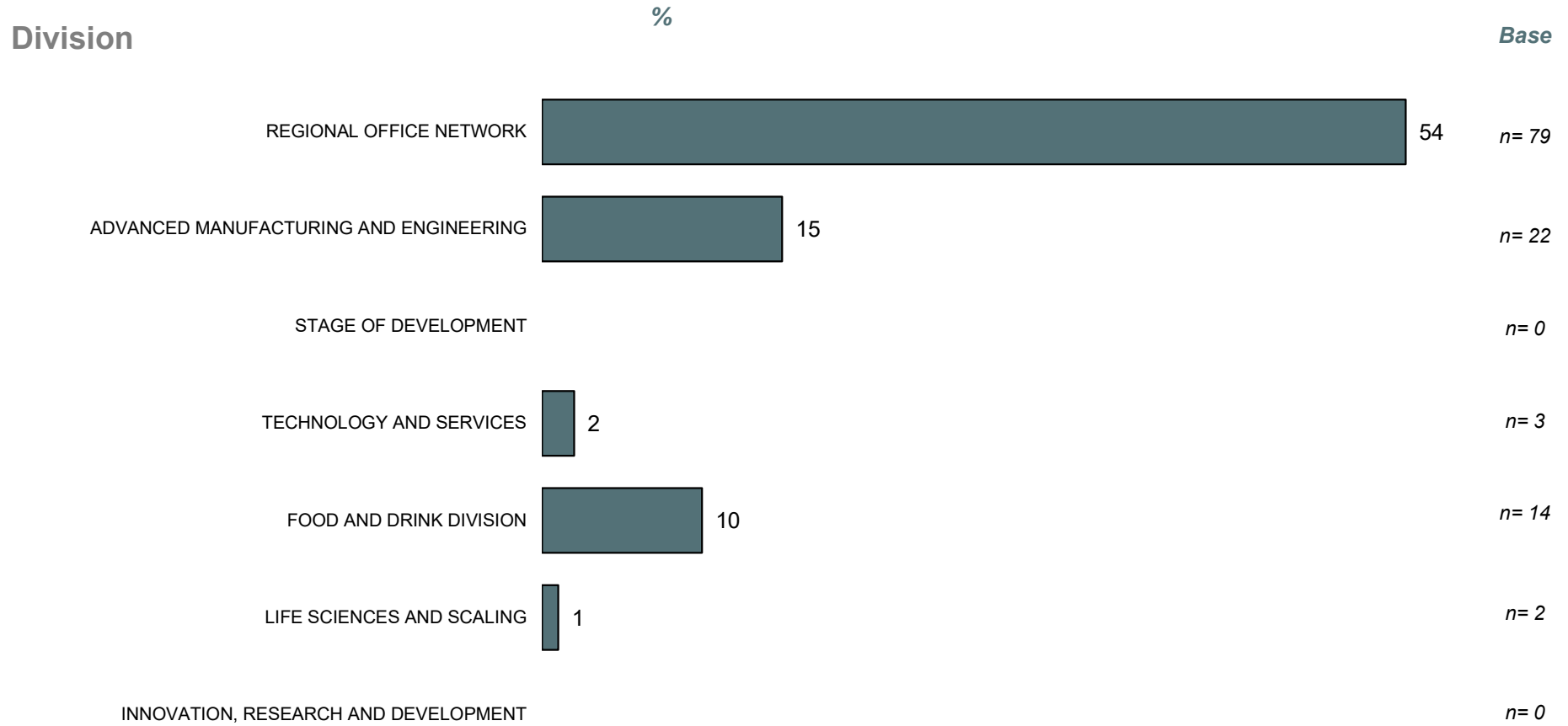
Sample

- Some 145 interviews were completed, 50 of these were Account Managed Customers and 75 were Regional Office Customers, all who accepted a letter of offer or support between April 2018 and June 2018. A sample of 22 were the Wider Business Base who had some form of interaction with Invest NI between April 2018 and June 2018. Of the 145 participating customers and WBB, 105 Customers and 18 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



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 Q1 2018, satisfaction with overall service received remained consistently high across the total sample with over 9 in 10 (92%) claiming to be satisfied. Within this, 3 in 5 (60%) were 'very satisfied' with Invest NI overall. These satisfaction results are consistent with Q4 2018 (92%) findings.
- A similar proportion of Account Managed Customers (90%) stated they were satisfied. Over three fifths (64%) of Account Managed Customers expressed they were 'very satisfied' (Similar to Q3 2017 - 63%).
- Overall levels of satisfaction among Regional Office Customers (92%) remained fairly consistent with Q4'18 (89%) results, although there was a decline in those who claimed to be 'very satisfied' (from 70% to 63%) .
- This quarter only 22 wider business base customers were surveyed so the base is too small to draw any conclusions from. Only 1 was dissatisfied, with the remaining 21 satisfied with the service received, with 9 claiming to be very satisfied.
- Levels of satisfaction remained high across both support areas. Grant support received a mean score of 4.68 (slightly up from Q4'18 at 4.56) and Programme support received a mean score of 4.43 (down from 4.57 in Q4'18).

Executive Summary (2) – Customers

Key Performance Indicators

- In Q1 2018, advocacy levels were high with 9 in 10 (90%) customers stating they would speak highly of Invest NI (consistent with Q4'18 at 88%).
- Advocacy levels were highest among Regional Office customers at 93%, increasing since Q4'18 (86%). Advocacy levels were also high among Account Managed Customers (86%), experiencing a marginal decline on Q4'18 levels (92%).
- Of the 22 WBB customers participating, 21 would speak highly of Invest NI.
- Levels of advocacy were similar for Grant and Programme support, receiving a mean score of 4.21 and 4.29 respectively. These results were lower than Q4'18 when Grant support received a mean score of 4.5 and Programme support 4.4.
- Invest NI achieved a Net Promoter Score of +64 (Q4'18 +64). The Net Promoter Score among Regional Office Customers (+71) increased from +67 in Q4'18. The Net Promoter Score amongst Account Managed Customers was +62 and +60 across the WBB.



Executive Summary (3) – Customers

- Just over 4 in 5 (81%) customers agreed that Invest NI was helping to develop their business, levels slightly lower than Q4'18 (87%) and Q3'17 (89%). Agreement was similar amongst Account Managed Customers (84%) and Regional Office Customers (81%). Agreement was lower among the WBB (72%).
- In terms of support areas, the highest mean score in relation to Invest NI helping develop business was achieved among those receiving grant support (4.54) compared to programme support (4.17). Figures for both grant support and programme support had declined slightly from Q4'18 (4.59 and 4.36 respectively).
- There was almost universal agreement amongst customers (98%) that Invest NI acts with professionalism and integrity, with three quarters (75%) of customers strongly agreeing with this sentiment, slightly up on Q4'18 (68%). Agreement levels were higher among Regional Office Customers (100%) Account Managed Customers (94%). Very positive levels were also recorded amongst the WBB (100%).
- Levels of agreement were high across the support areas, with Grant support receiving a mean score of 4.82, higher than Q4'18 (4.65), and Programme support receiving a mean score of 4.73, again increasing on the previous quarter (4.6).
- Levels of agreement that Invest NI exceeded expectations had declined since Q4'18 (71% in Q1 compared to 78% in Q4). Agreement was similar among Account Managed and Regional Office Customers (70%).

Executive Summary (4) – Customers

- In Q1'18, over 4 in 5 (84%) customers agreed that Invest NI delivered value to their business (up from Q4'18 at 81%). Agreement levels remained consistent among the Account Managed (84%) and Regional Office customers (83%).
- Just under three quarters of customers (72%) agreed that they received information on additional support programmes that are available from Invest NI. These levels of agreement were slightly down on Q4'18 (76%). Overall agreement among Regional Office customers was 72%. Account Managed customers had slightly higher agreement (74%), but this had declined from Q4'18 (82%).
- Almost 9 in 10 customers (88%) were in agreement that a realistic timescale was discussed and agreed for planned activities. A finding that was similar to the previous quarter (90% in Q4'18).
- Agreement levels among Account Managed customers (82%) had declined since Q4'18 (95%). Agreement levels among Regional Office customers (94%) were up from Q4'18 (85%), but were slightly down among the WBB (78% in Q1'18, 85% in Q4'18).
- The vast majority (96%) were in agreement that Invest NI treated them fairly, similar to Q4'18 (94%). Across customer segments, agreement was fairly similar among Account Managed customers (94%) and the Regional Office customers (98%).

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 Q1 2018, all key drivers of satisfaction achieved a mean score of no less than 4.33 out of a possible 5. The top two rated drivers for Q1 were responded to queries (4.61) and clarity of communication (4.61).

Executive Summary (6) – Customers

Detailed Performance Measures

- In Q1 2018, the average mean score for overall performance was 4.47 out of a possible 5. The mean score was on par with Q4'18 (4.47).
- All performance areas achieved a mean score of no less than 4.33 out of a possible 5, slightly lower than Q4'18 (4.39).
- The strongest performing areas were clear communication (4.61) and responding to queries (4.61).
- The weaker aspects of the engagement included understanding of business needs (4.33).
- The mean score for the overall performance by segment were as follows:
 - Account Managed customers = 4.37
 - Regional Office customers = 4.60
 - Wider Business base = 4.29

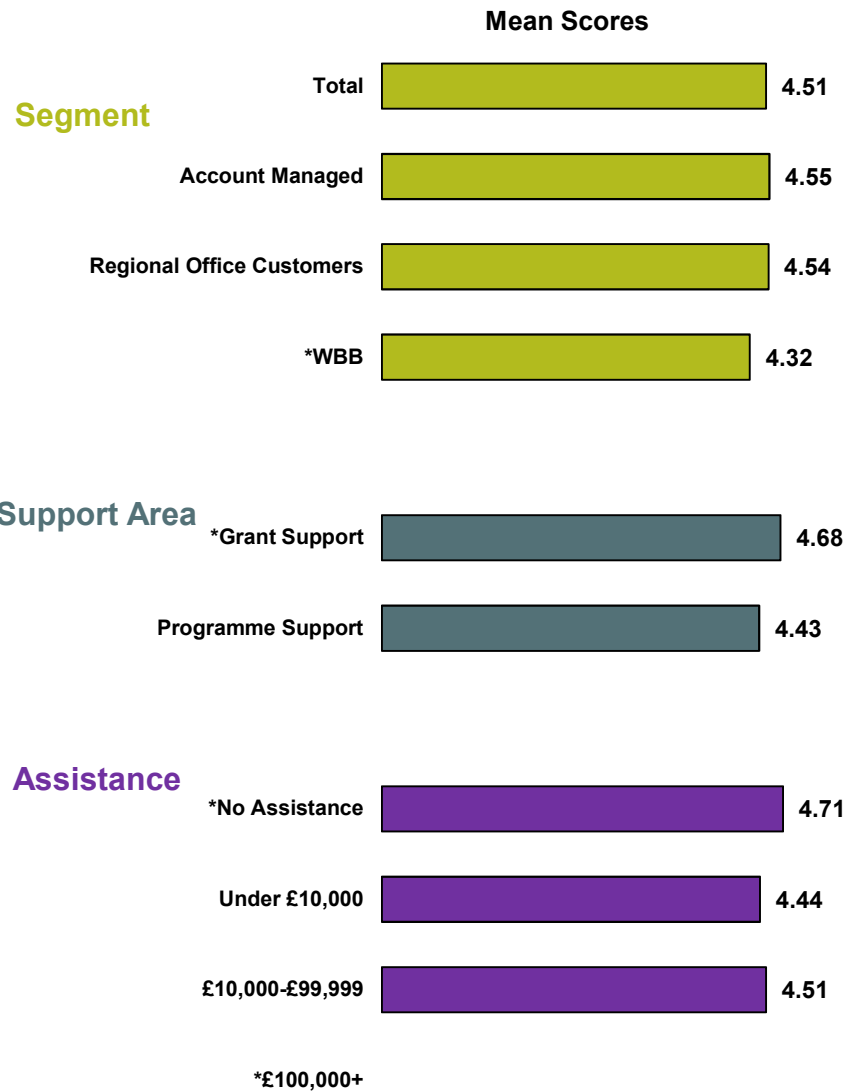
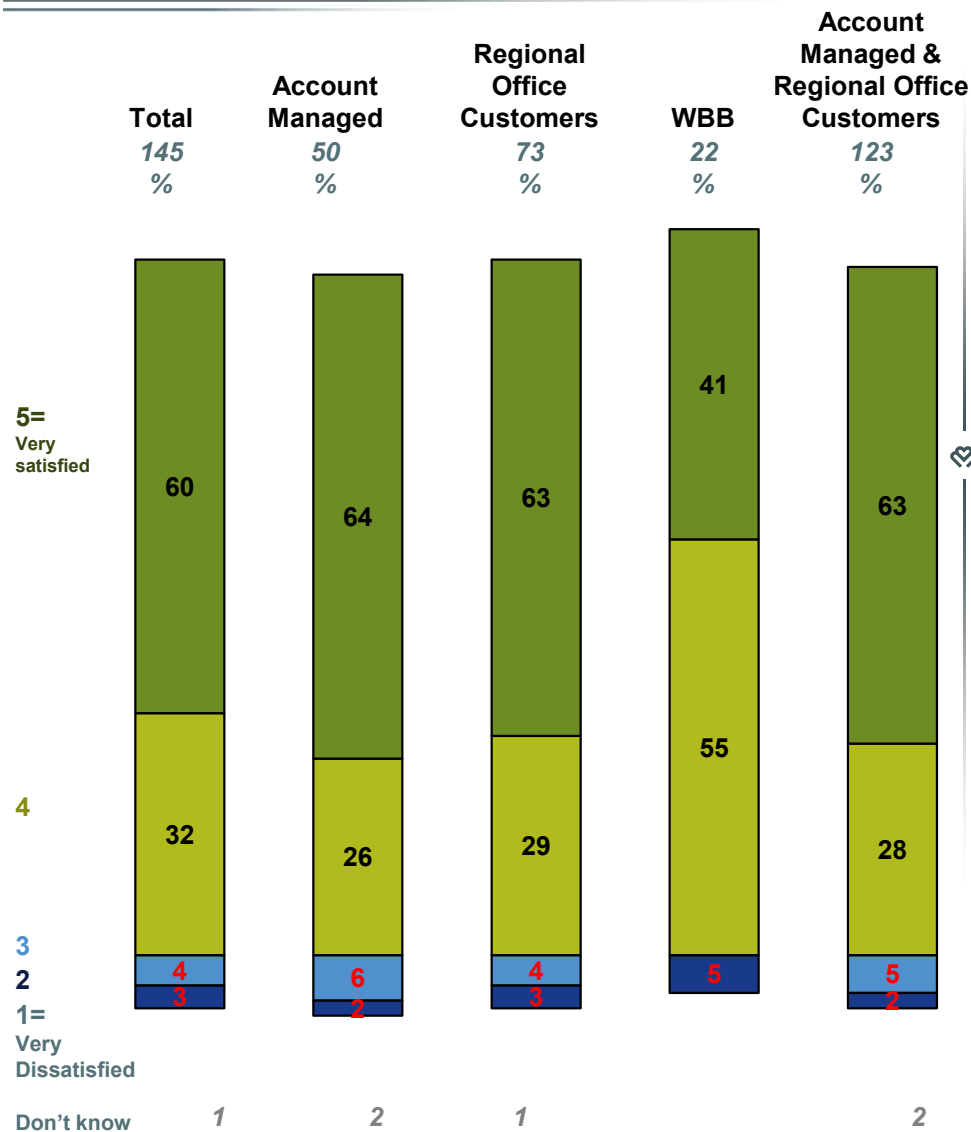


SATISFACTION



Key Performance Indicator – Satisfaction

*Small Bases = less than 50



How satisfied or dissatisfied are you with Invest NI overall in relation to this project?

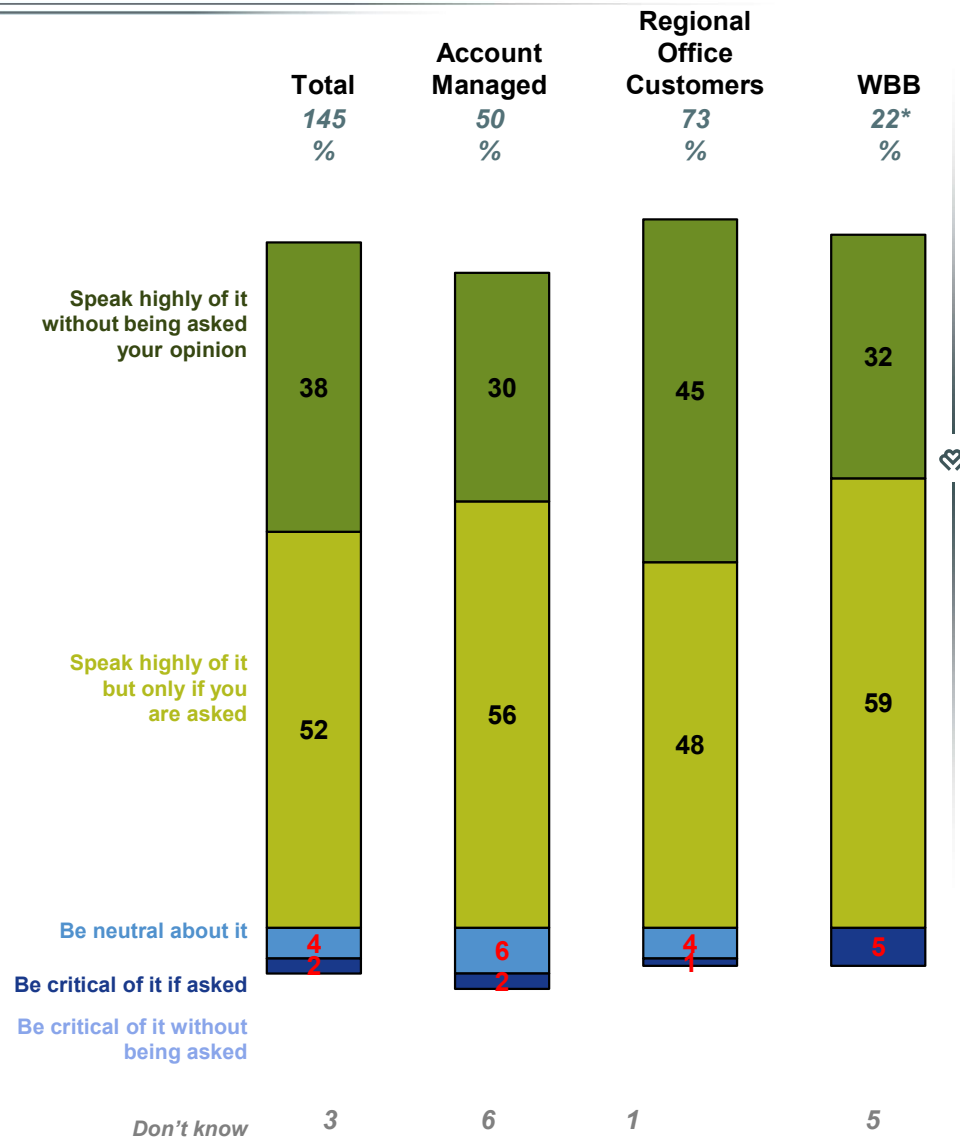
[Base: 145 Apr'18-Jun'18 (50 Account Managed, 73 Regional Office Customers and 22* WBB)]

ADVOCACY



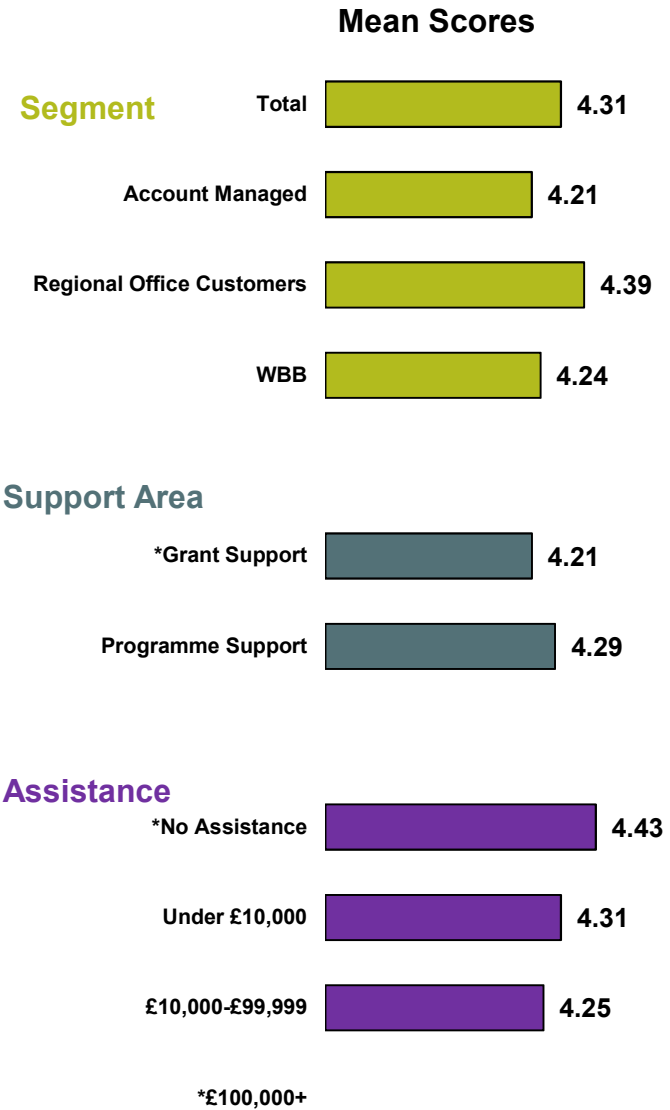
Key Performance Indicator – Advocacy

**Small Bases = less than 50*



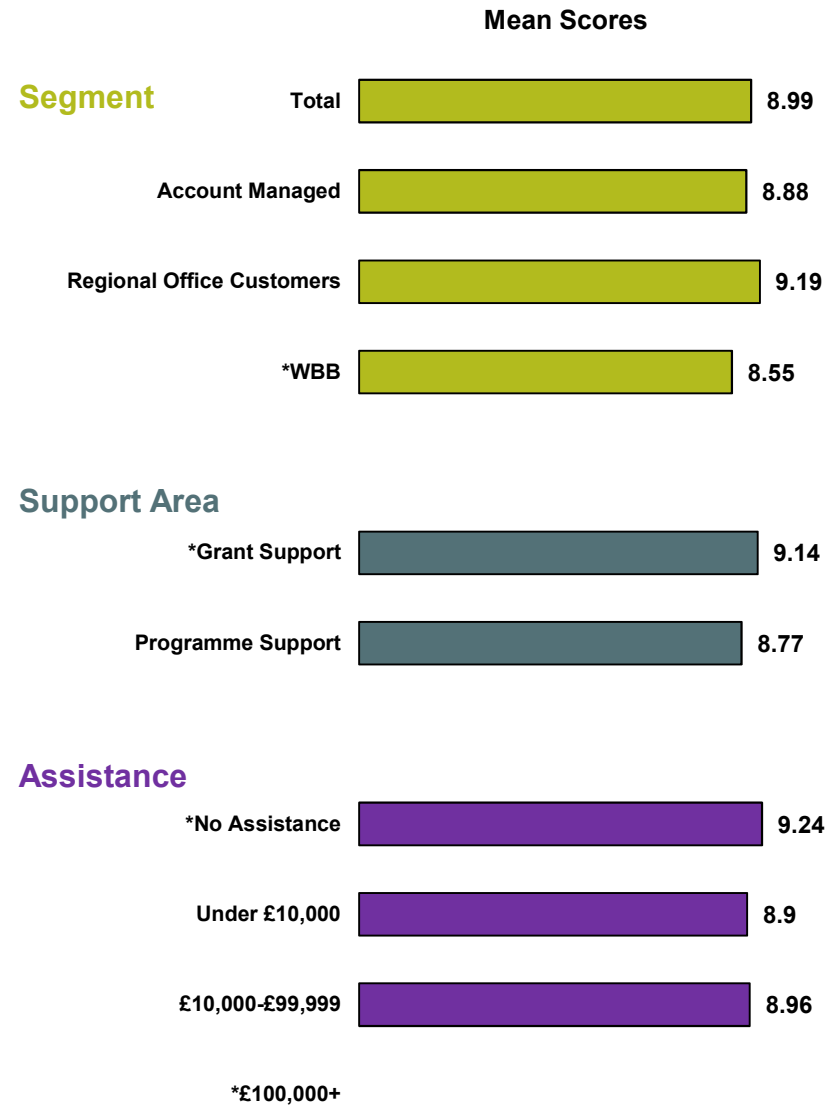
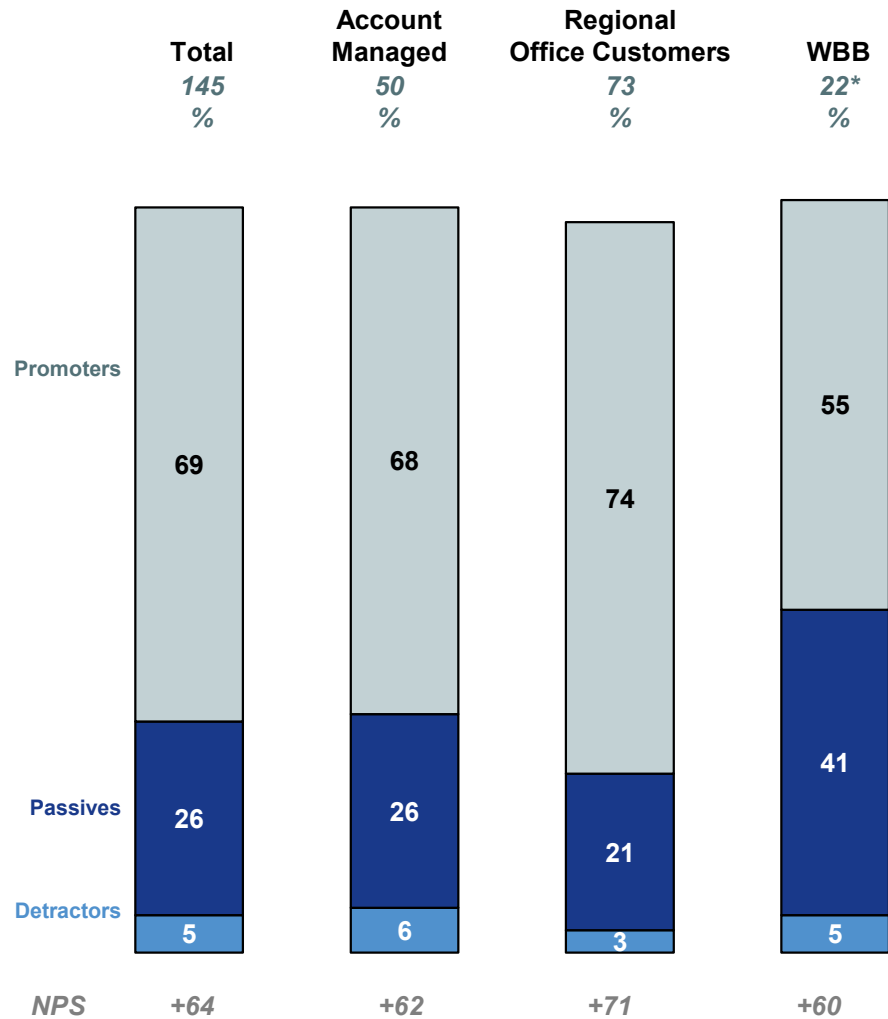
How highly would you speak about Invest NI?

[Base: 145 Apr'18-Jun'18 (50 Account Managed, 73 Regional Office Customers and 22* WBB)]



Net Promoter Score

**Small Bases = less than 50*



On a scale of 0 to 10 where 0 is not at all likely and 10 is extremely likely, please indicate how likely you are to recommend Invest NI to a friend or colleague? [Base: 145 Apr'18-Jun'18 (50 Account Managed, 73 Regional Office Customers and 22* WBB)]

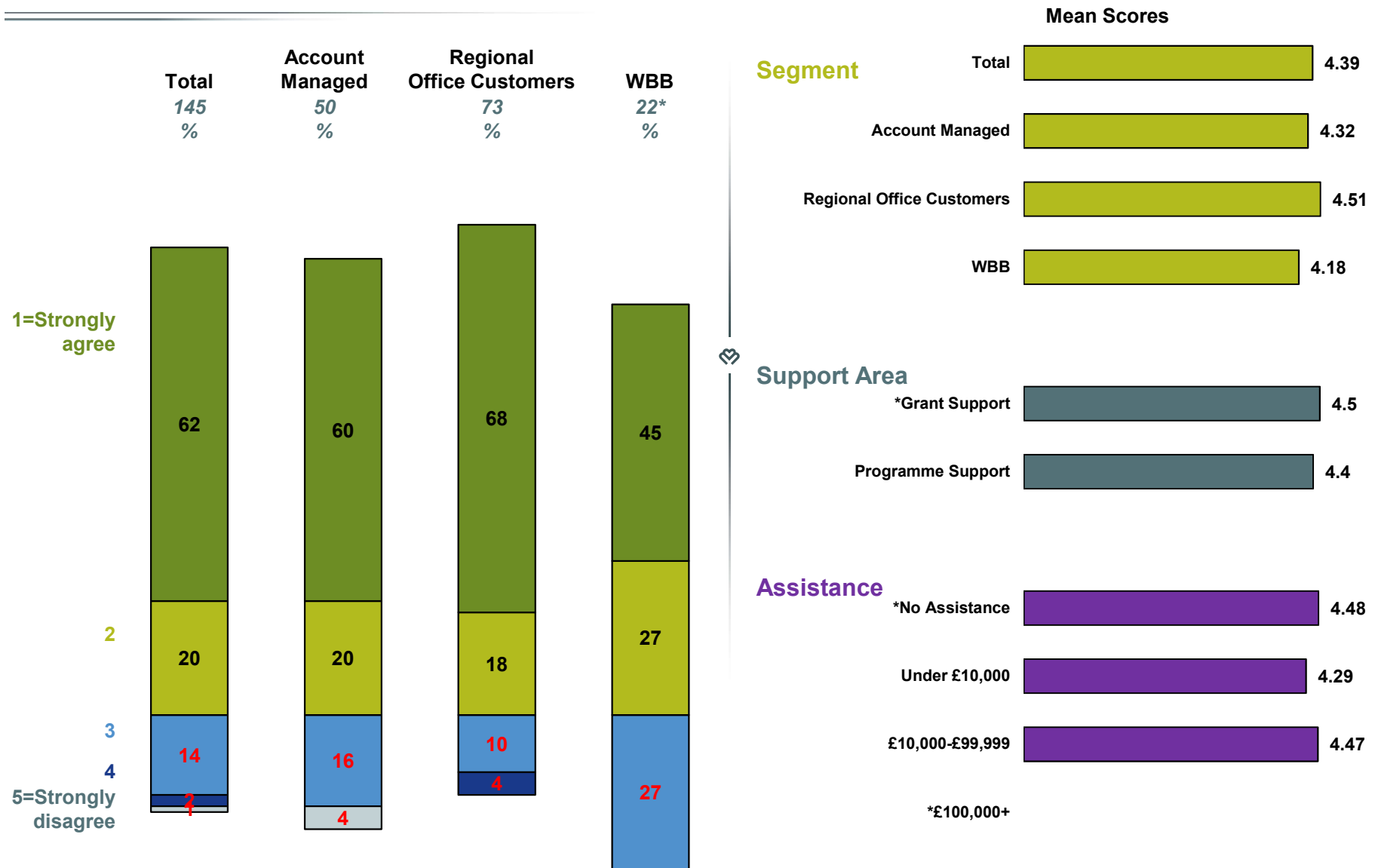
CLIENT FOCUSED



Key Performance Indicator – Client Focused

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

**Small Bases = less than 50*

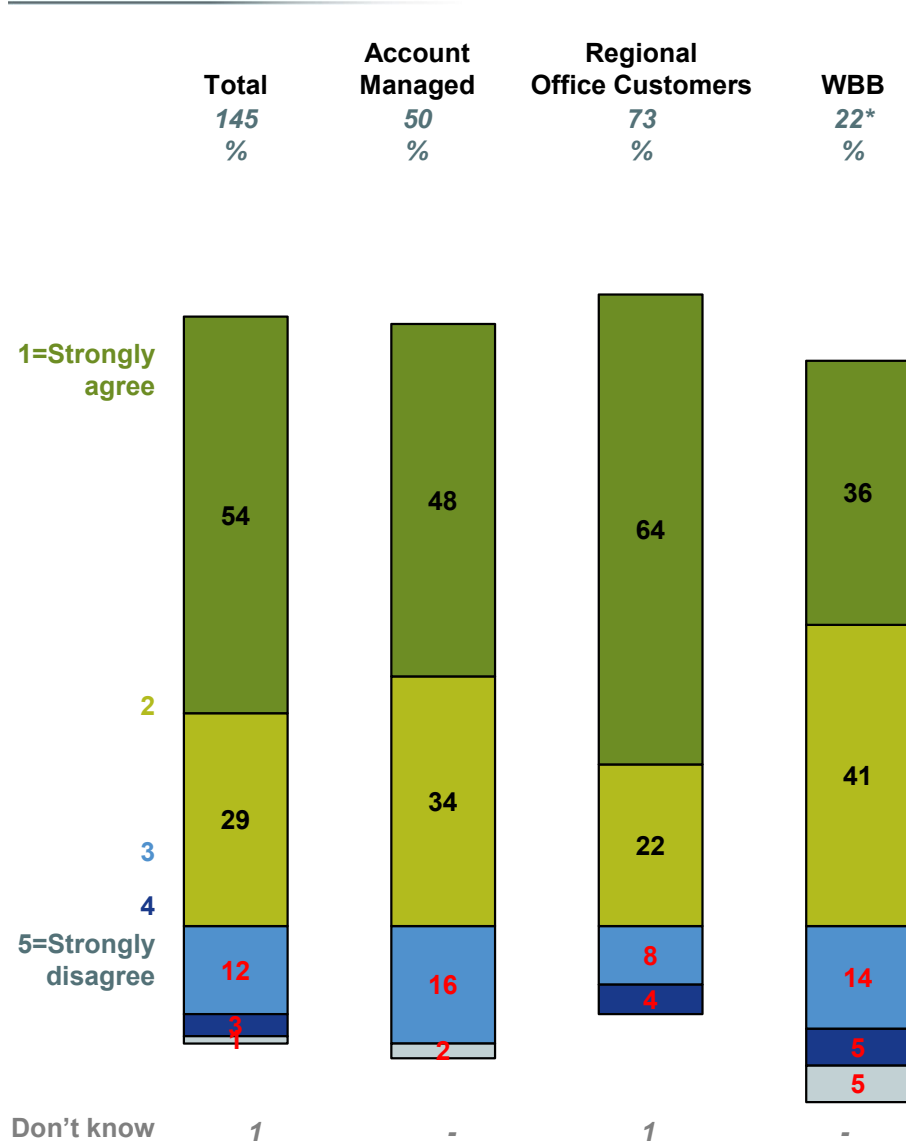


Using a scale from 1 to 5, where 1 means ‘strongly agree’ and 5 means ‘strongly disagree’, to what extent do you agree or disagree that Invest NI ...? [Base: 145 Apr’18-Jun’18 (50 Account Managed, 73 Regional Office Customers and 22* WBB)]

Key Performance Indicator – Client Focused

'Had sufficient understanding of your business needs'

*Small Bases = less than 50

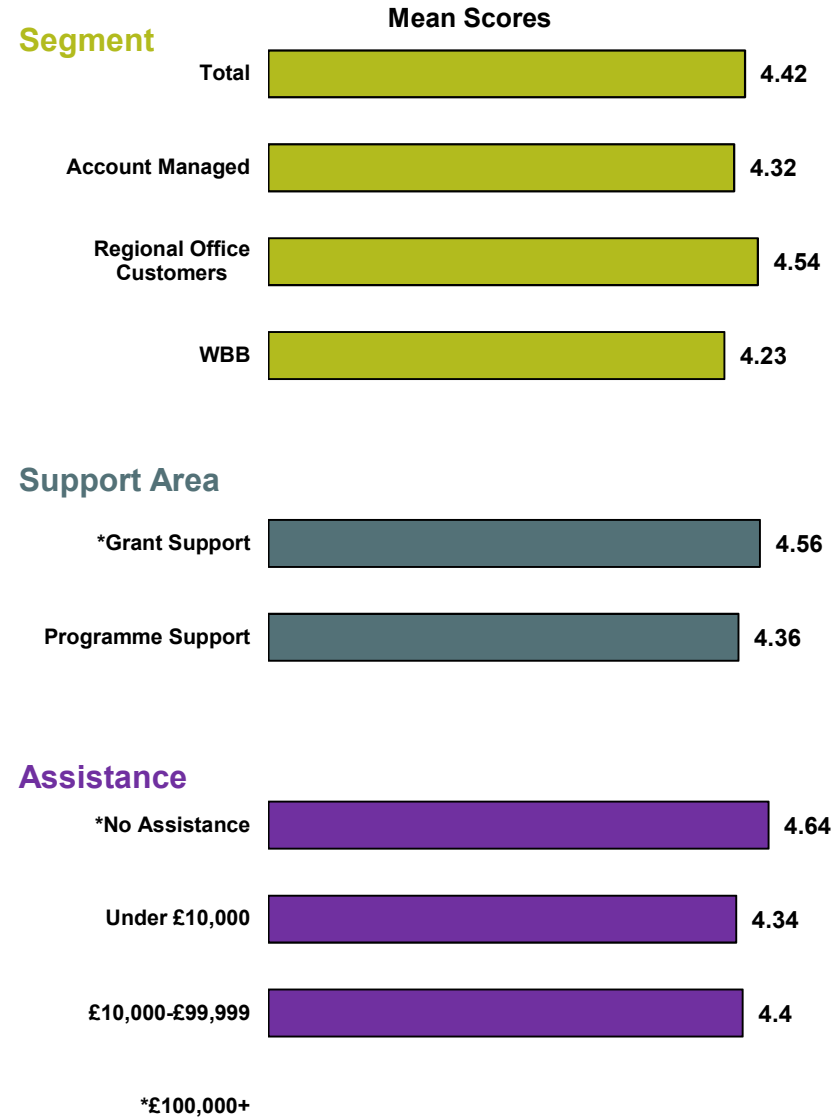
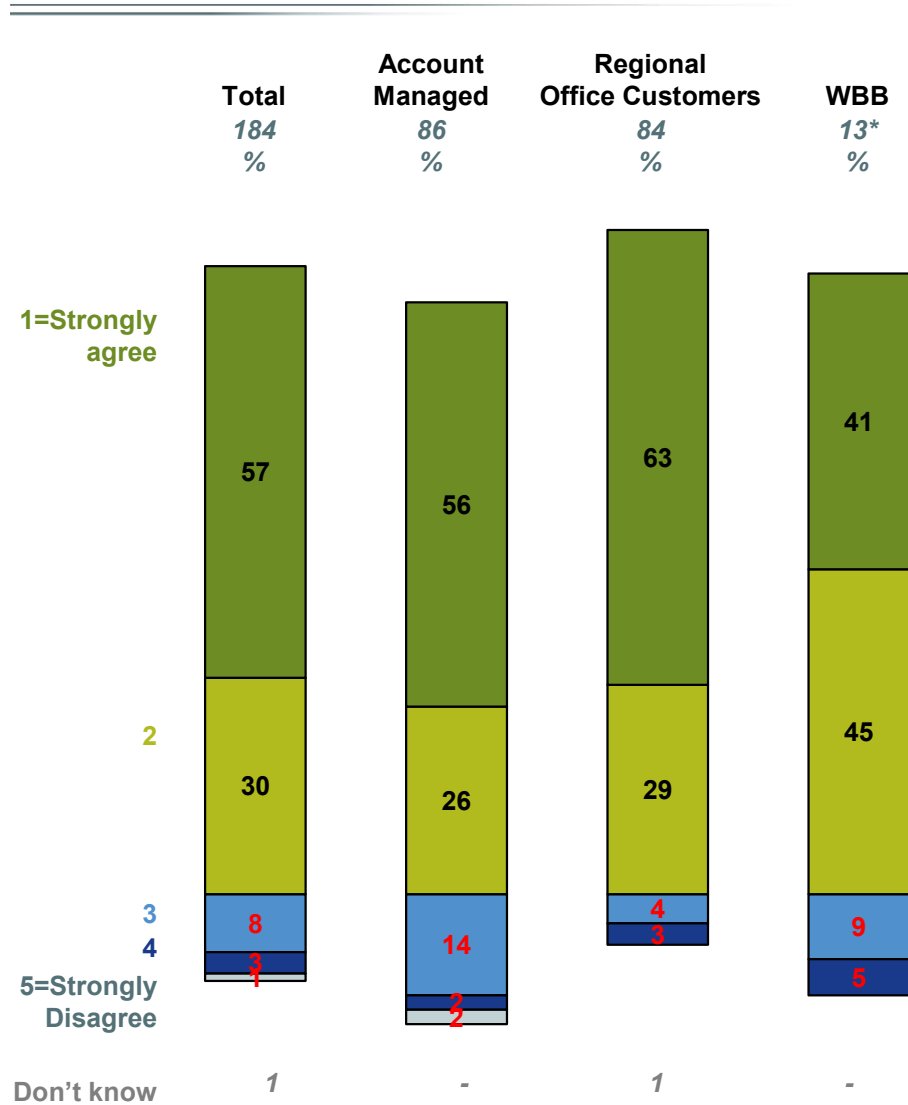


Using a scale from 1 to 5, where 1 means 'strongly agree' and 5 means 'strongly disagree', to what extent do you agree or disagree that Invest NI ...? [Base: 145 Apr'18-Jun'18 (50 Account Managed, 73 Regional Office Customers and 22* WBB)]

Key Performance Indicator – Client Focused

‘Tailored its response to meet your business needs’

**Small Bases = less than 50*

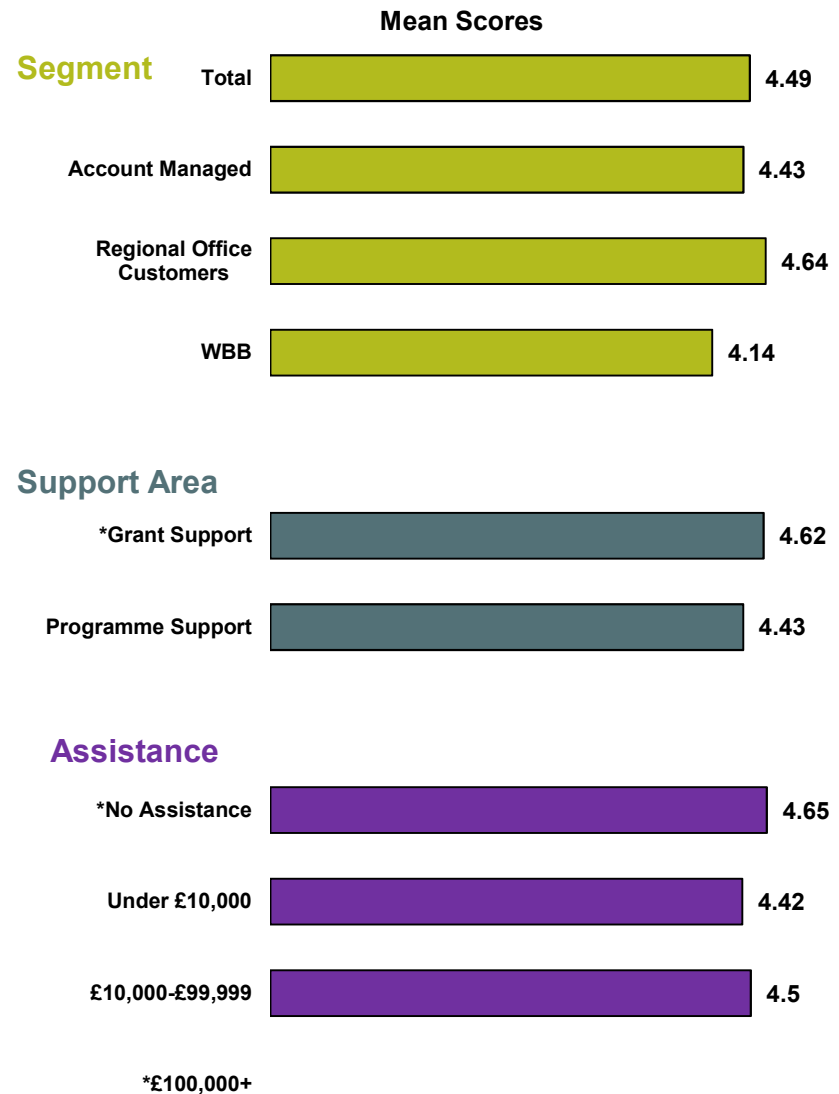
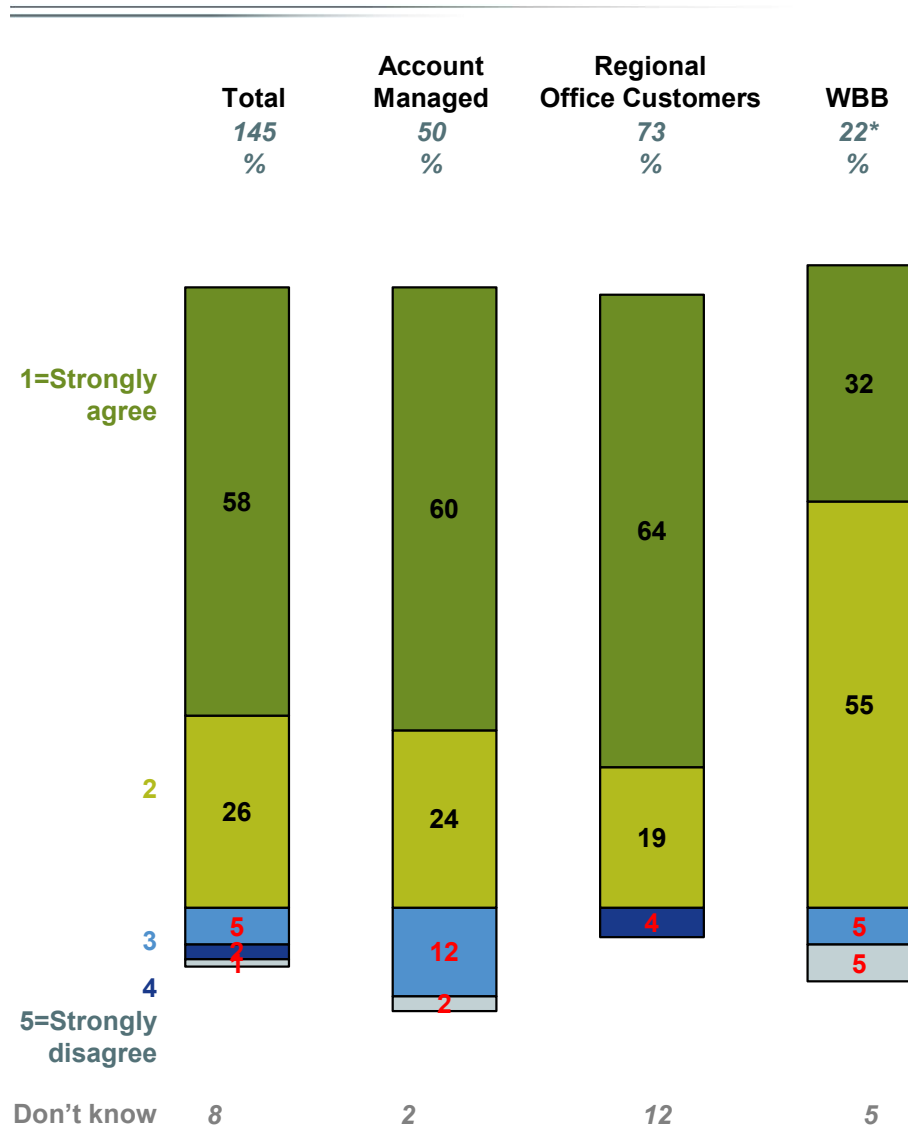


Using a scale from 1 to 5, where 1 means 'strongly agree' and 5 means 'strongly disagree', to what extent do you agree or disagree that Invest NI ...? [Base: 145 Apr'18-Jun'18 (50 Account Managed, 73 Regional Office Customers and 22* WBB)]

Key Performance Indicator – Client Focused

‘Delivered value to your business’

**Small Bases = less than 50*

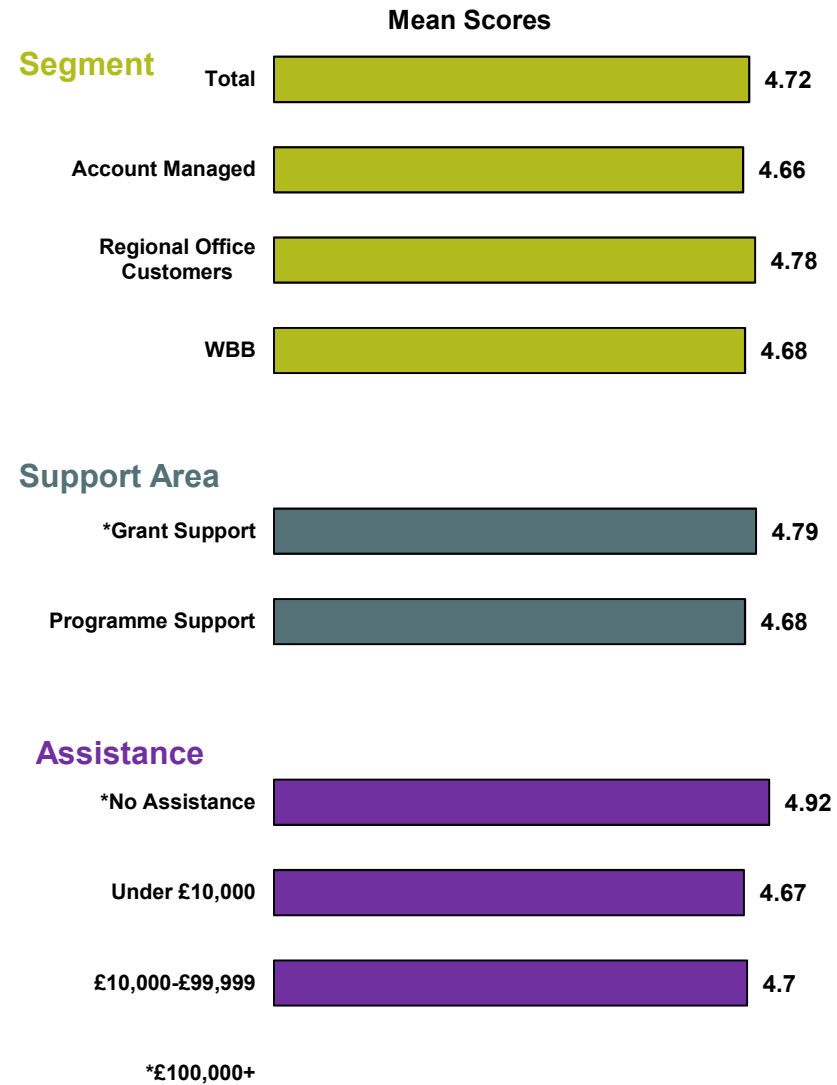
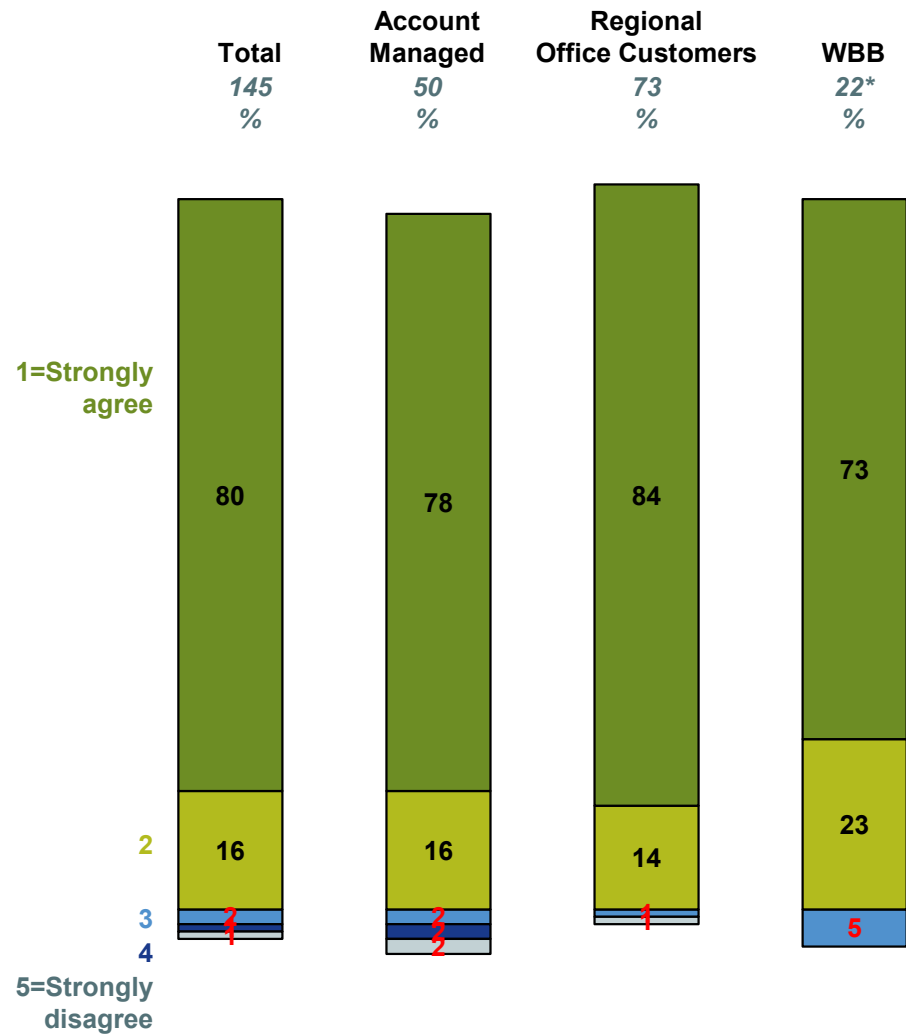


Using a scale from 1 to 5, where 1 means 'strongly agree' and 5 means 'strongly disagree', to what extent do you agree or disagree that Invest NI ...? [Base: 145 Apr'18-Jun'18 (50 Account Managed, 73 Regional Office Customers and 22* WBB)]

Key Performance Indicator – Client Focused

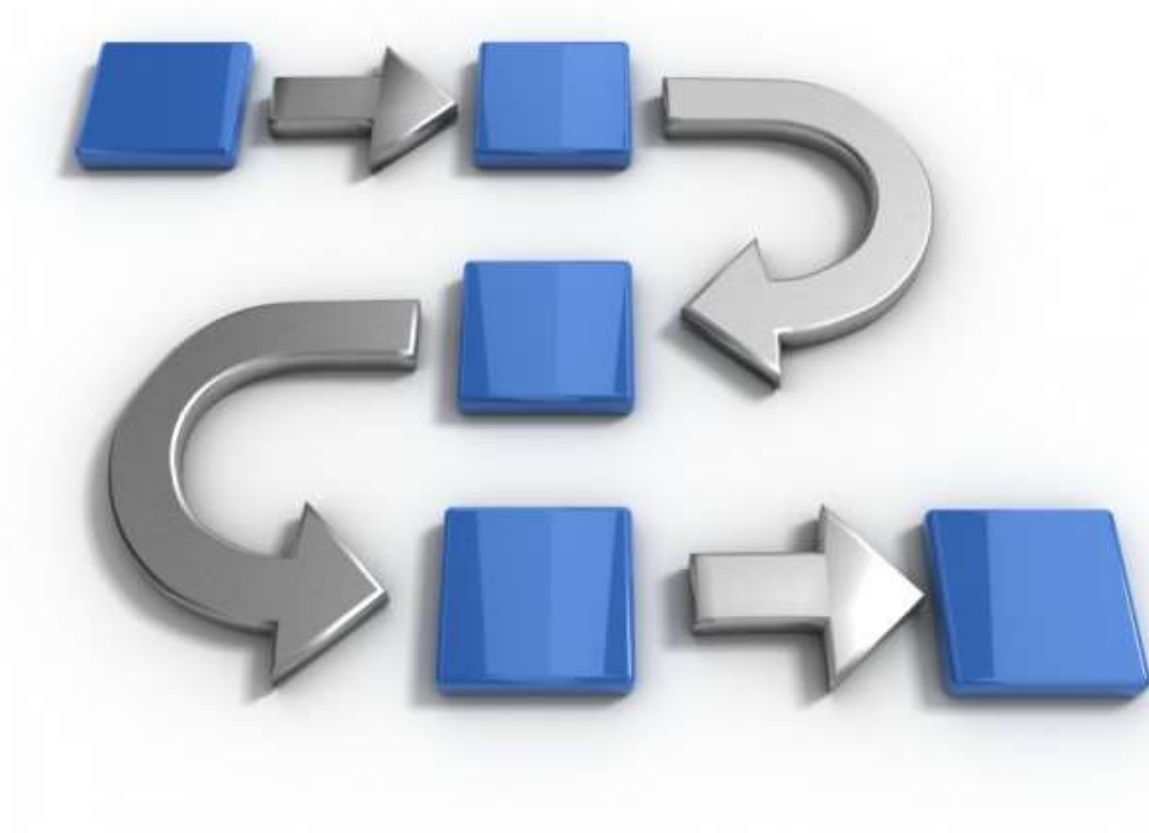
'Treated You Fairly'

**Small Bases = less than 50*



Using a scale from 1 to 5, where 1 means 'strongly agree' and 5 means 'strongly disagree', to what extent do you agree or disagree that Invest NI ...? [Base: 145 Apr'18-Jun'18 (50 Account Managed, 73 Regional Office Customers and 22* WBB)]

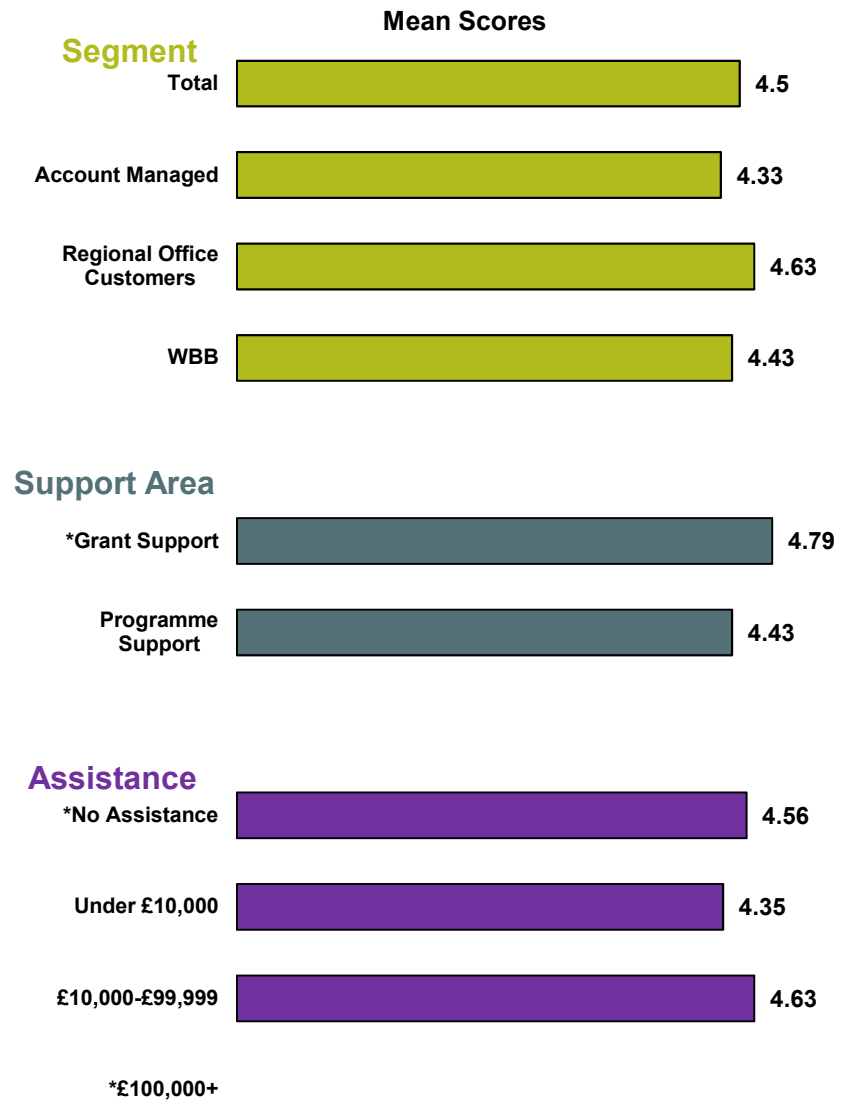
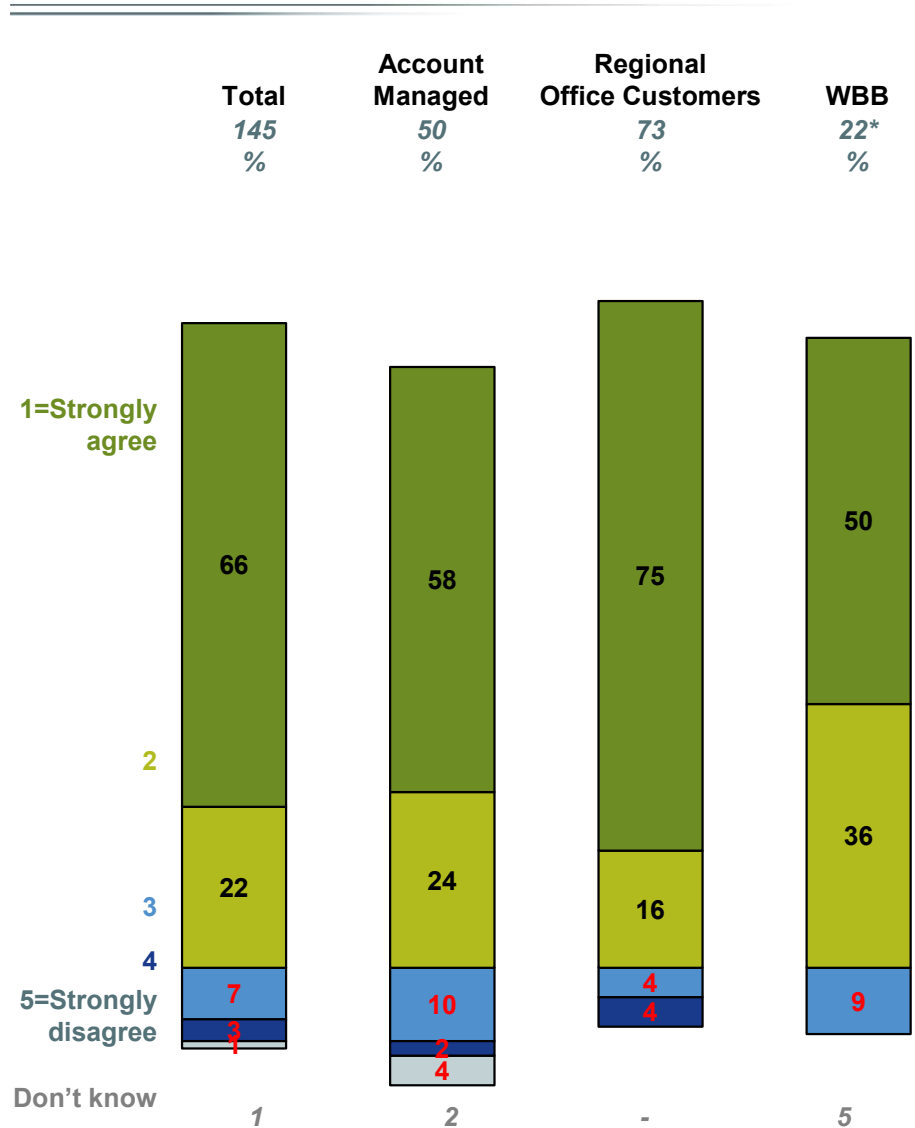
PROCESS MANAGEMENT



Key Performance Indicator – Process Management

‘Explained and agreed detailed requirements’

**Small Bases = less than 50*

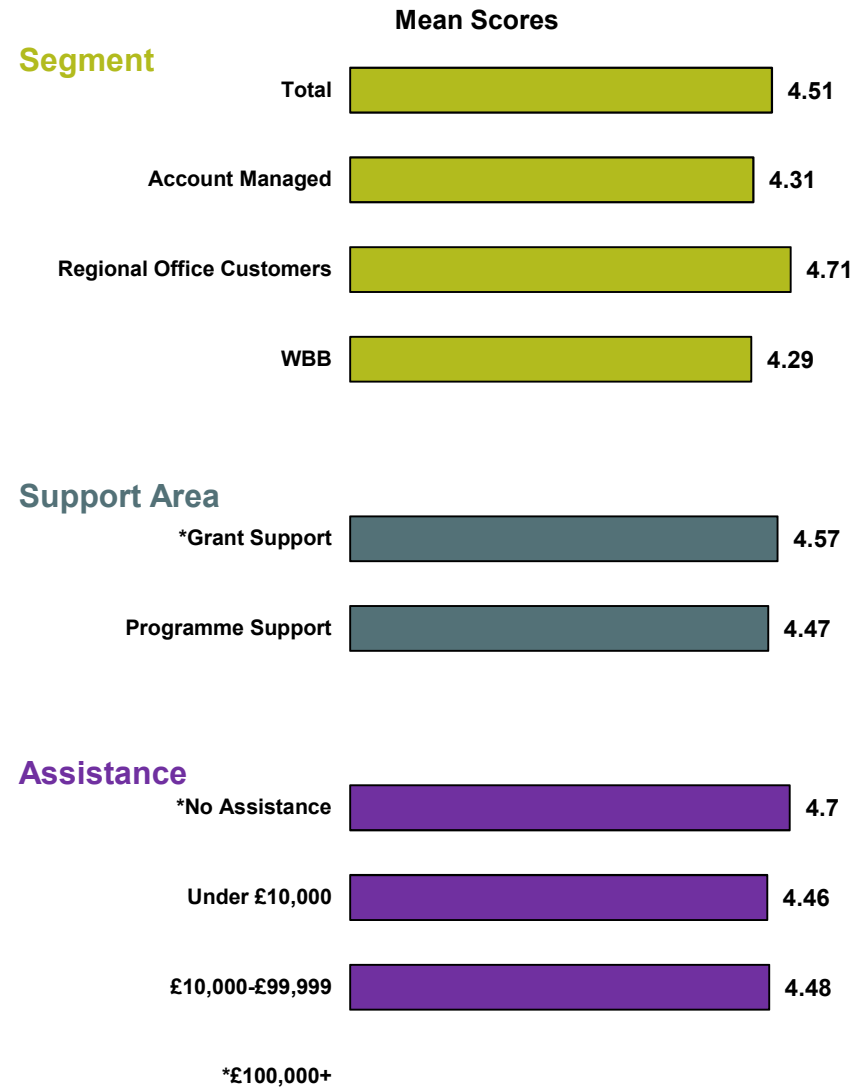
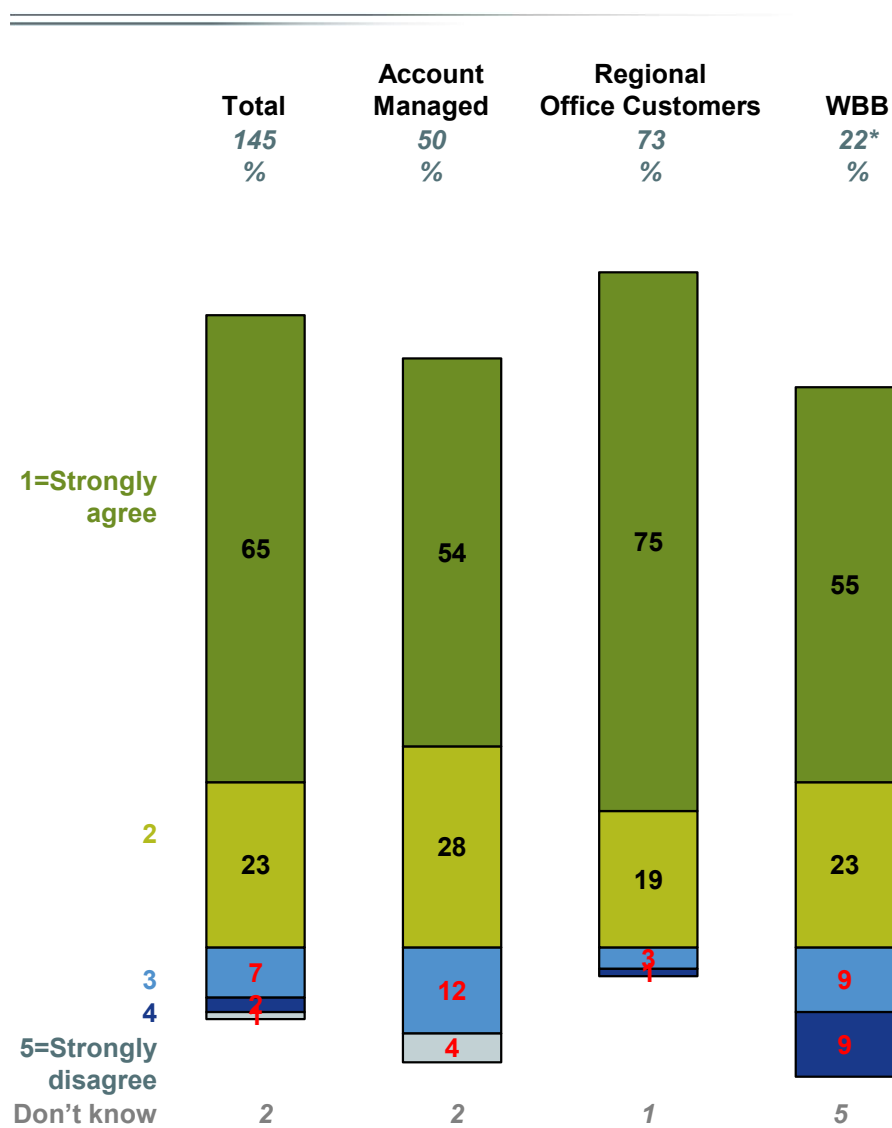


Using a scale from 1 to 5, where 1 means 'strongly agree' and 5 means 'strongly disagree', to what extent do you agree or disagree that Invest NI ...? [Base: 145 Apr'18-Jun'18 (50 Account Managed, 73 Regional Office Customers and 22* WBB)]

Key Performance Indicator – Process Management

‘Discussed and agreed a realistic timescale for planned activities’

**Small Bases = less than 50*

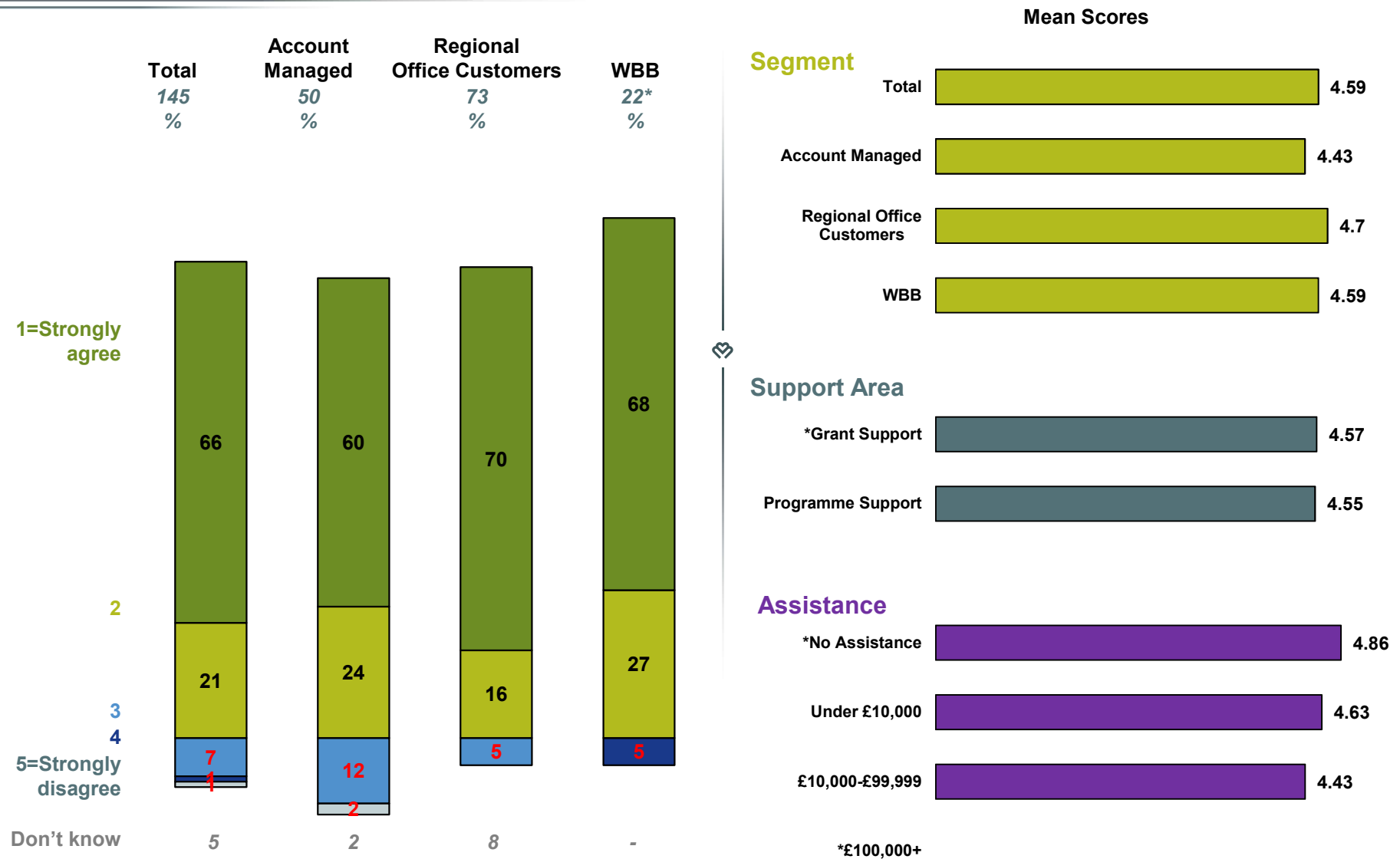


Using a scale from 1 to 5, where 1 means 'strongly agree' and 5 means 'strongly disagree', to what extent do you agree or disagree that Invest NI ...? [Base: 145 Apr'18-Jun'18 (50 Account Managed, 73 Regional Office Customers and 22* WBB)]

Key Performance Indicator – Process Management

‘Completed activities according to the agreed timeline’

**Small Bases = less than 50*

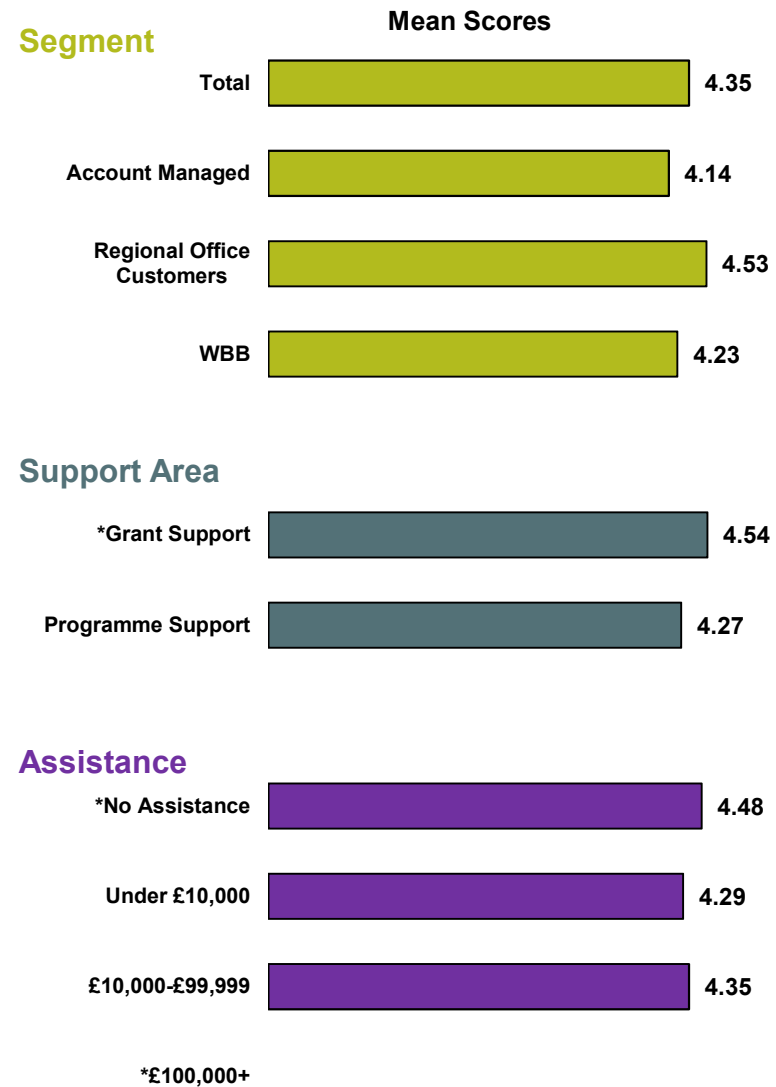
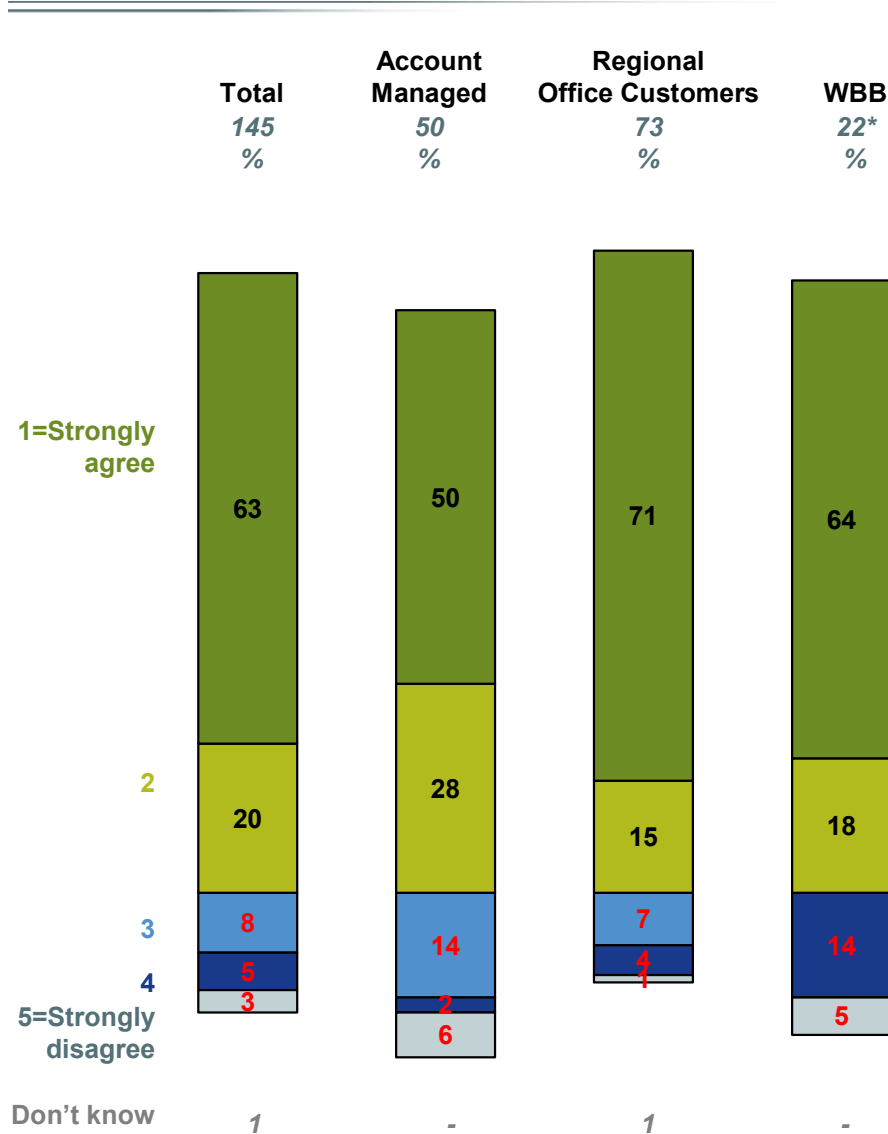


Using a scale from 1 to 5, where 1 means 'strongly agree' and 5 means 'strongly disagree', to what extent do you agree or disagree that Invest NI ...? [Base: 145 Apr'18-Jun'18 (50 Account Managed, 73 Regional Office Customers and 22* WBB)]

Key Performance Indicator – Process Management

'Was proactive in providing advice and support'

**Small Bases = less than 50*

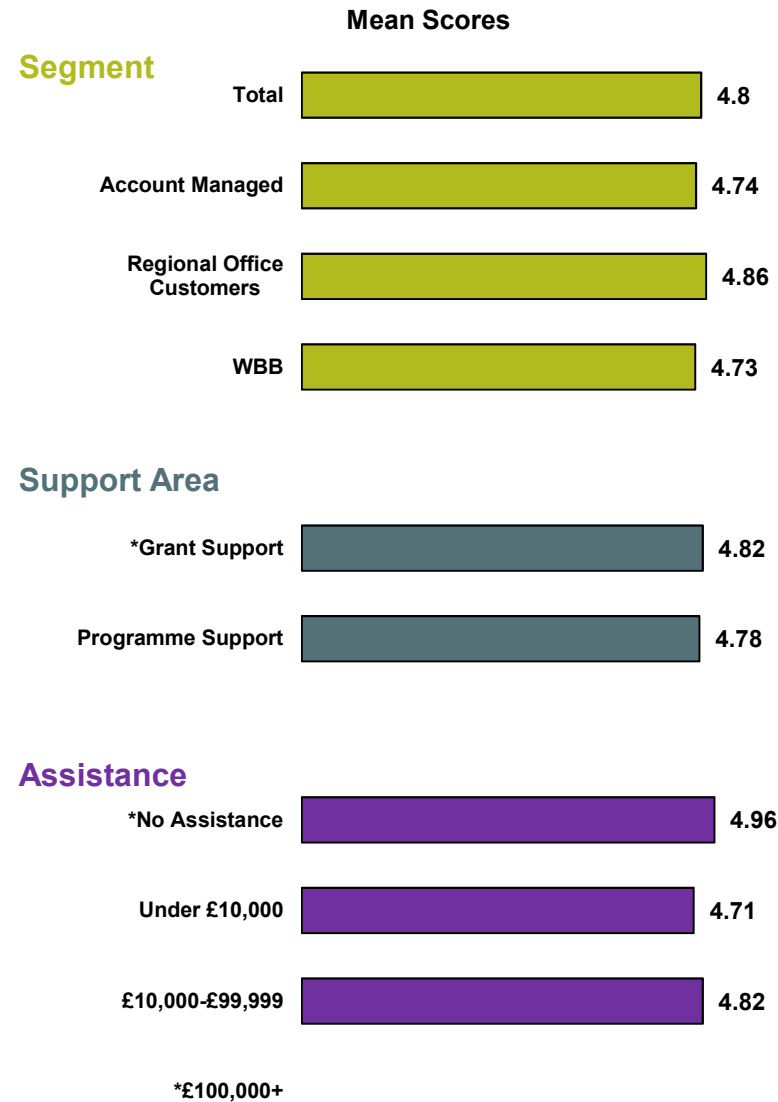
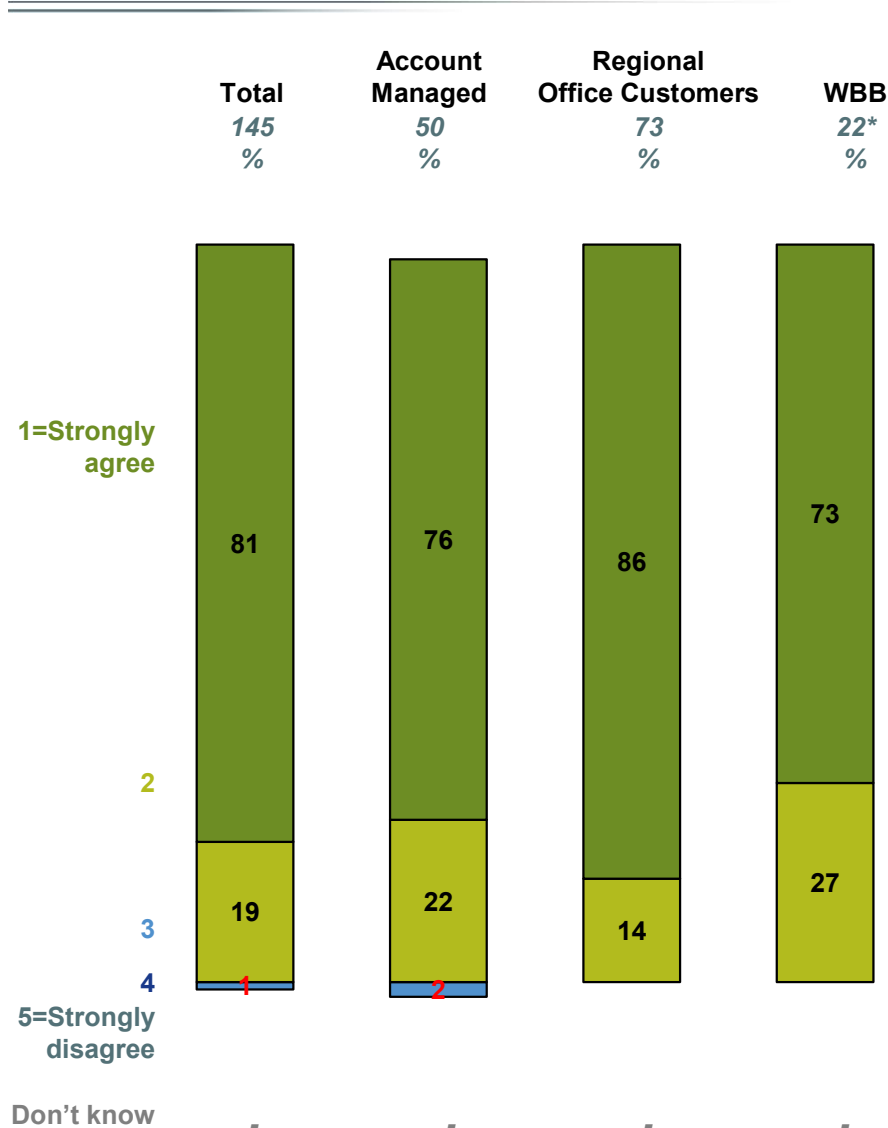


Using a scale from 1 to 5, where 1 means 'strongly agree' and 5 means 'strongly disagree', to what extent do you agree or disagree that Invest NI ...? [Base: 145 Apr'18-Jun'18 (50 Account Managed, 73 Regional Office Customers and 22* WBB)]

Key Performance Indicator – Process Management

‘Were Polite and Friendly’

**Small Bases = less than 50*



Using a scale from 1 to 5, where 1 means 'strongly agree' and 5 means 'strongly disagree', to what extent do you agree or disagree that Invest NI ...? [Base: 145 Apr'18-Jun'18 (50 Account Managed, 73 Regional Office Customers and 22* WBB)]

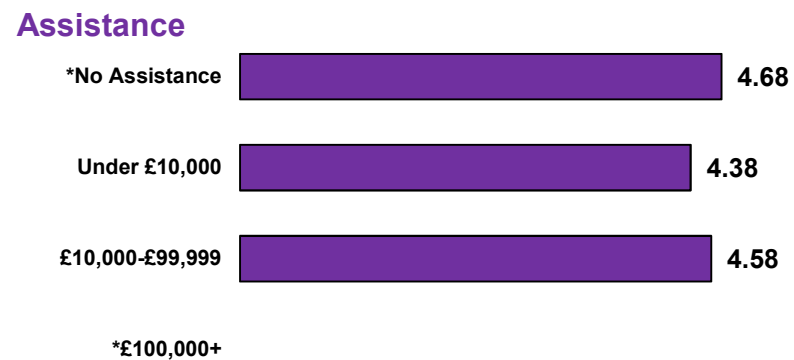
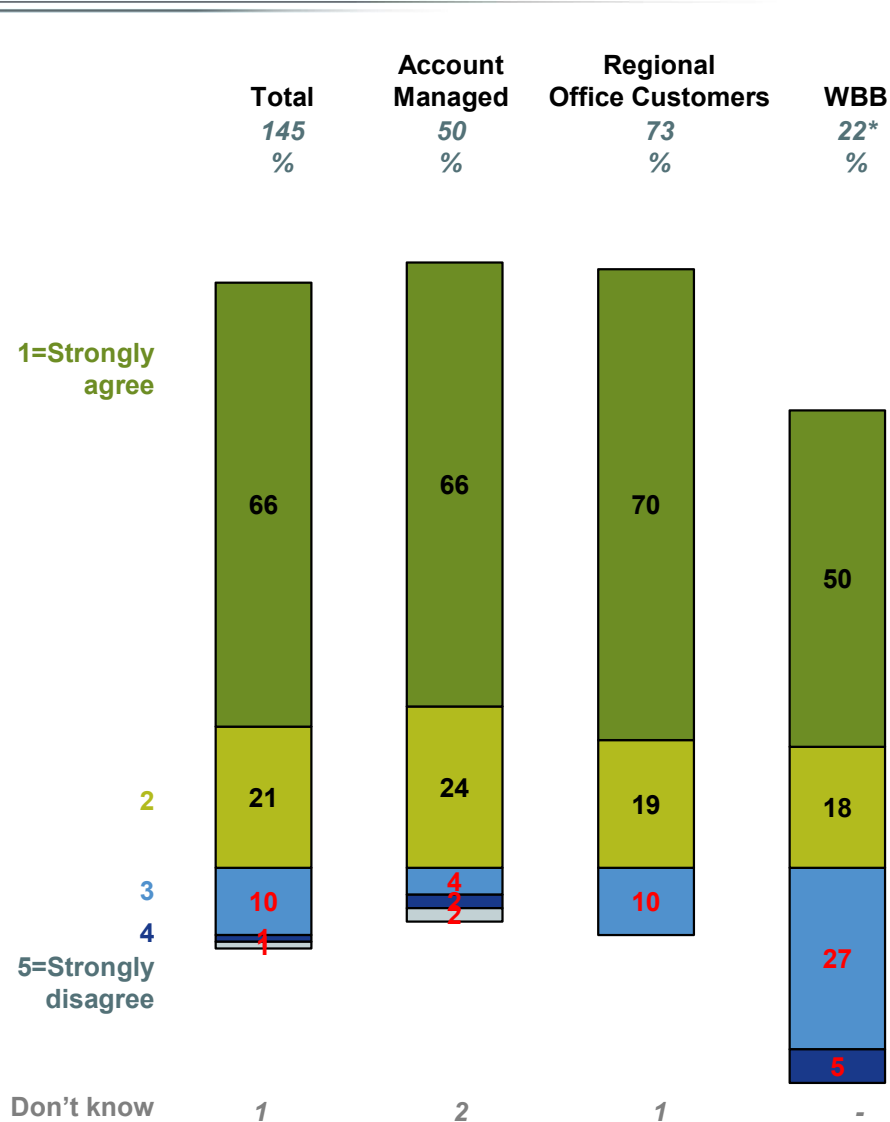
PROCESS COMMUNICATION



Key Performance Indicator – Process Communication

'Kept you informed of progress throughout the process'

**Small Bases = less than 50*

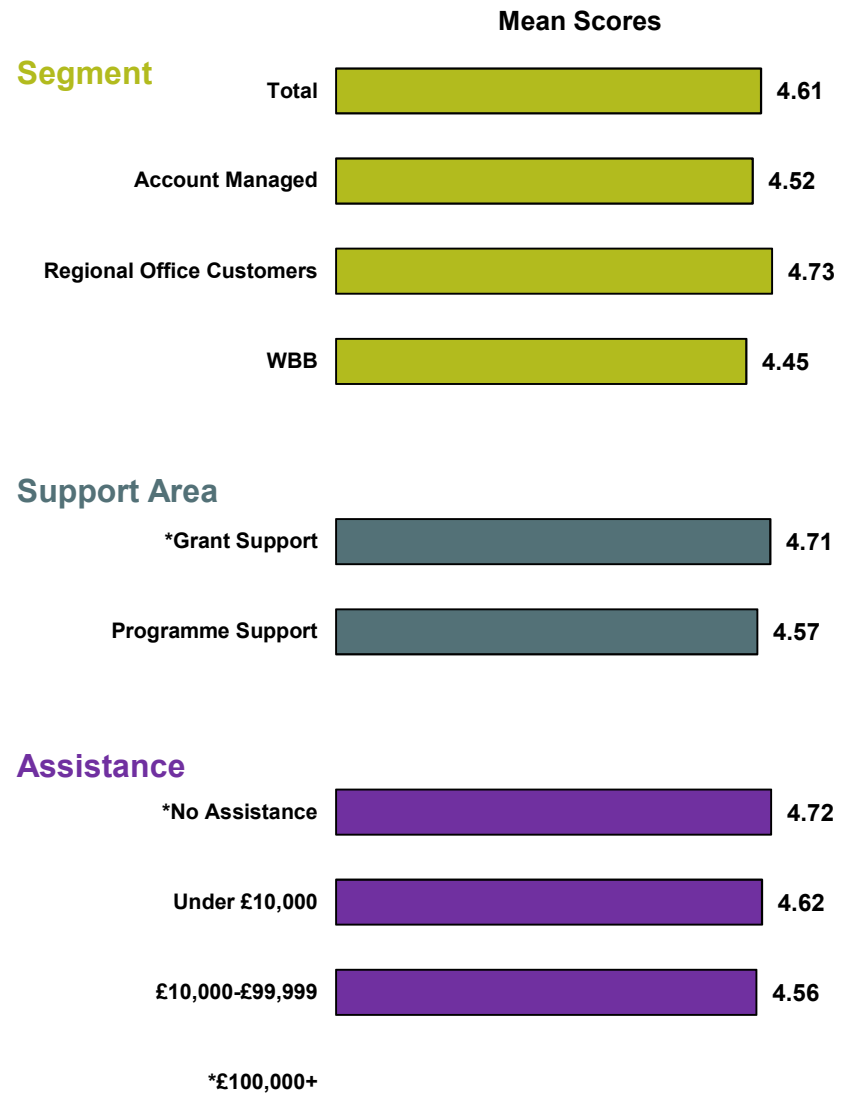
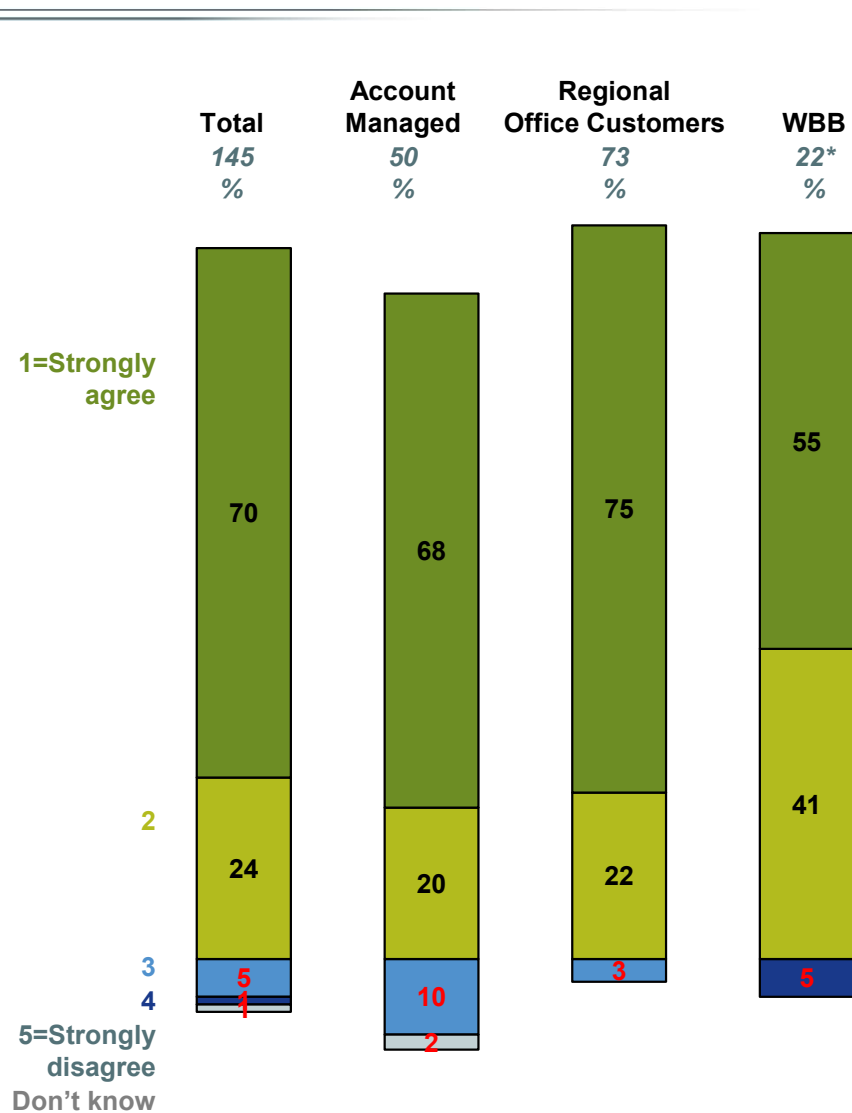


Using a scale from 1 to 5, where 1 means 'strongly agree' and 5 means 'strongly disagree', to what extent do you agree or disagree that Invest NI ...? [Base: 145 Apr'18-Jun'18 (50 Account Managed, 73 Regional Office Customers and 22* WBB)]

Key Performance Indicator – Process Communication

‘Responded to your queries within a reasonable timeframe’

**Small Bases = less than 50*

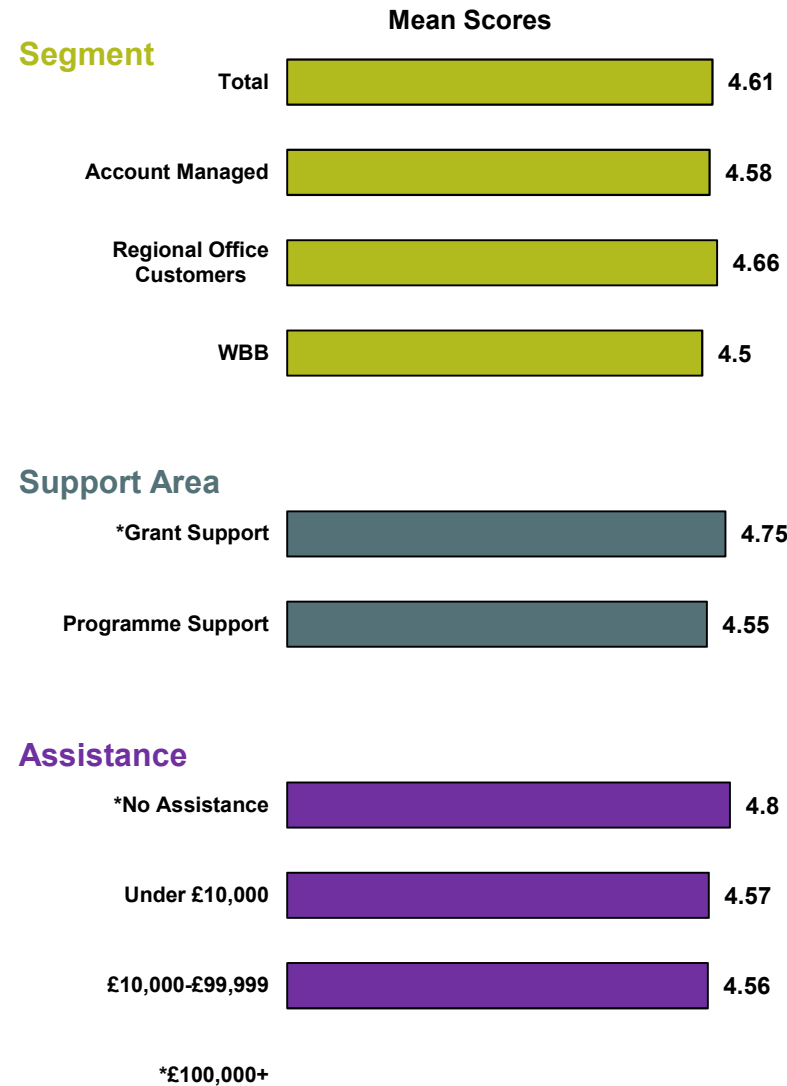
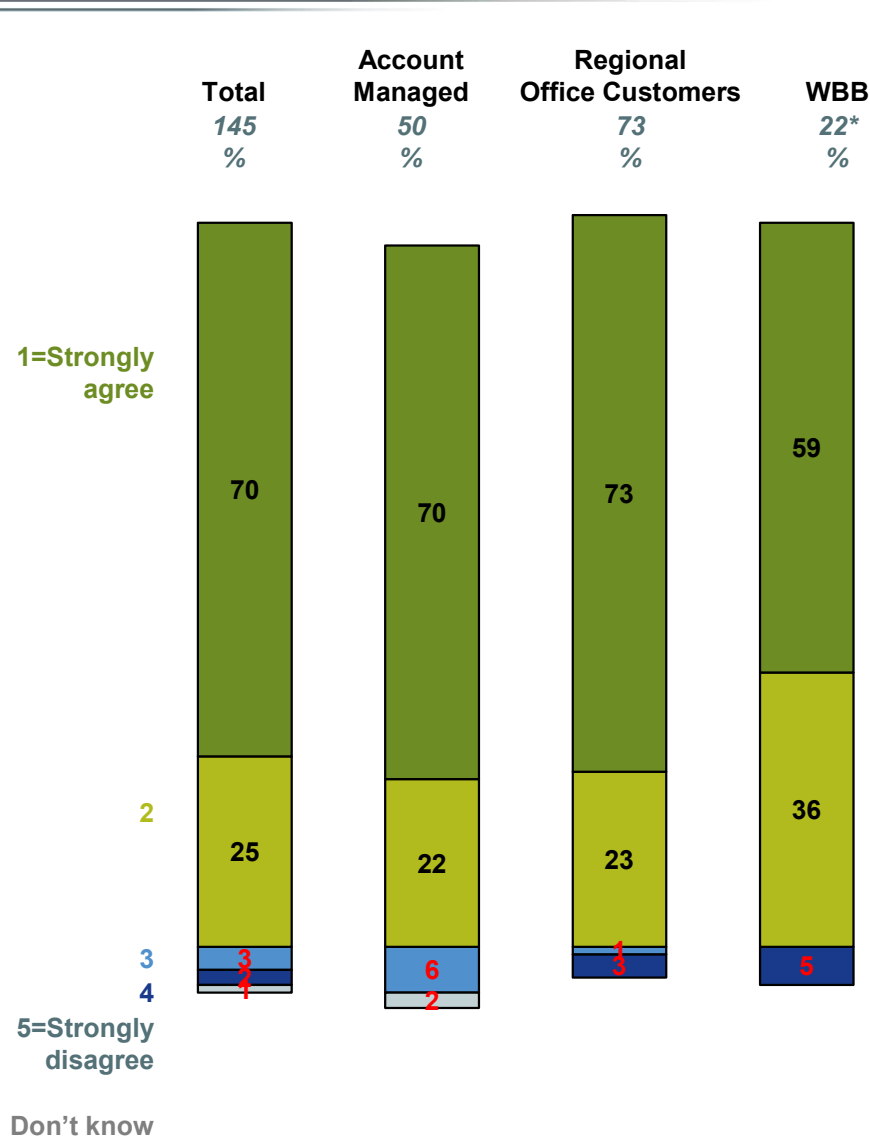


Using a scale from 1 to 5, where 1 means 'strongly agree' and 5 means 'strongly disagree', to what extent do you agree or disagree that Invest NI ...? [Base: 145 Apr'18-Jun'18 (50 Account Managed, 73 Regional Office Customers and 22* WBB)]

Key Performance Indicator – Process Communication

'Used clear and effective communication'

**Small Bases = less than 50*



Using a scale from 1 to 5, where 1 means 'strongly agree' and 5 means 'strongly disagree', to what extent do you agree or disagree that Invest NI ...? [Base: 145 Apr'18-Jun'18 (50 Account Managed, 73 Regional Office Customers and 22* WBB)]

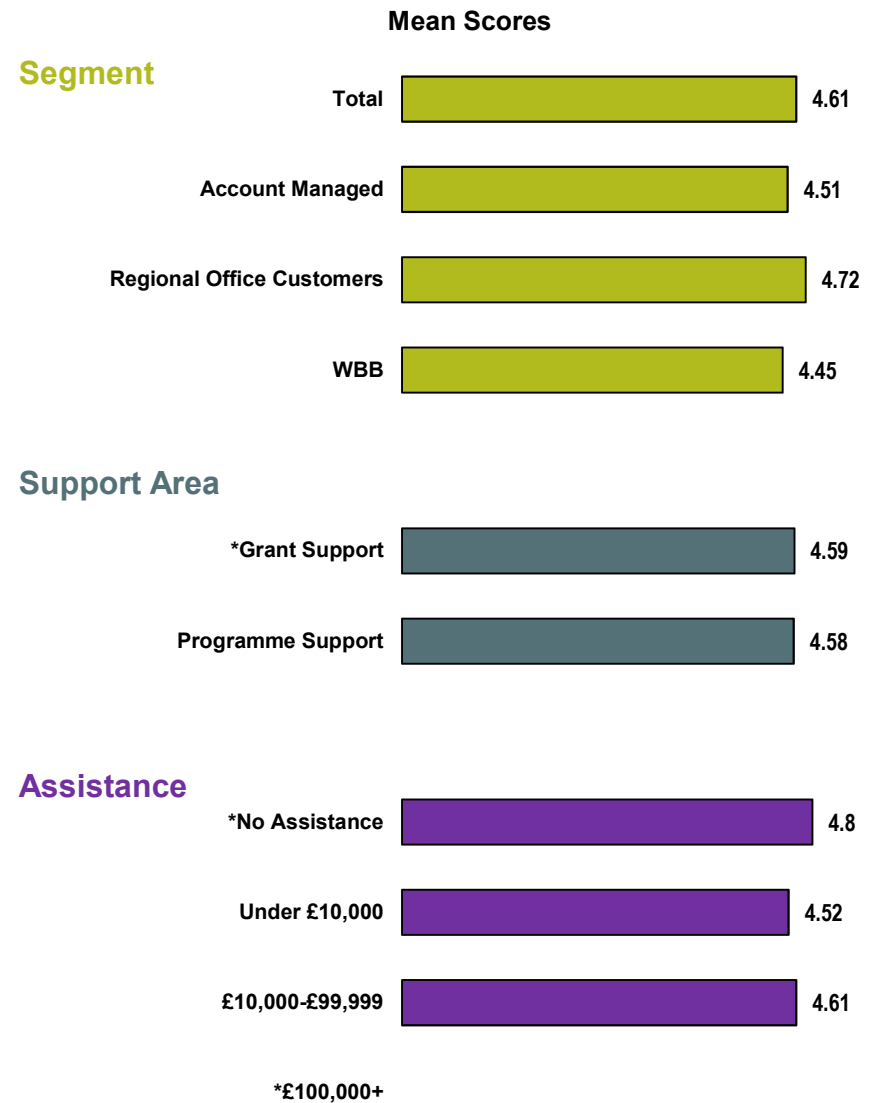
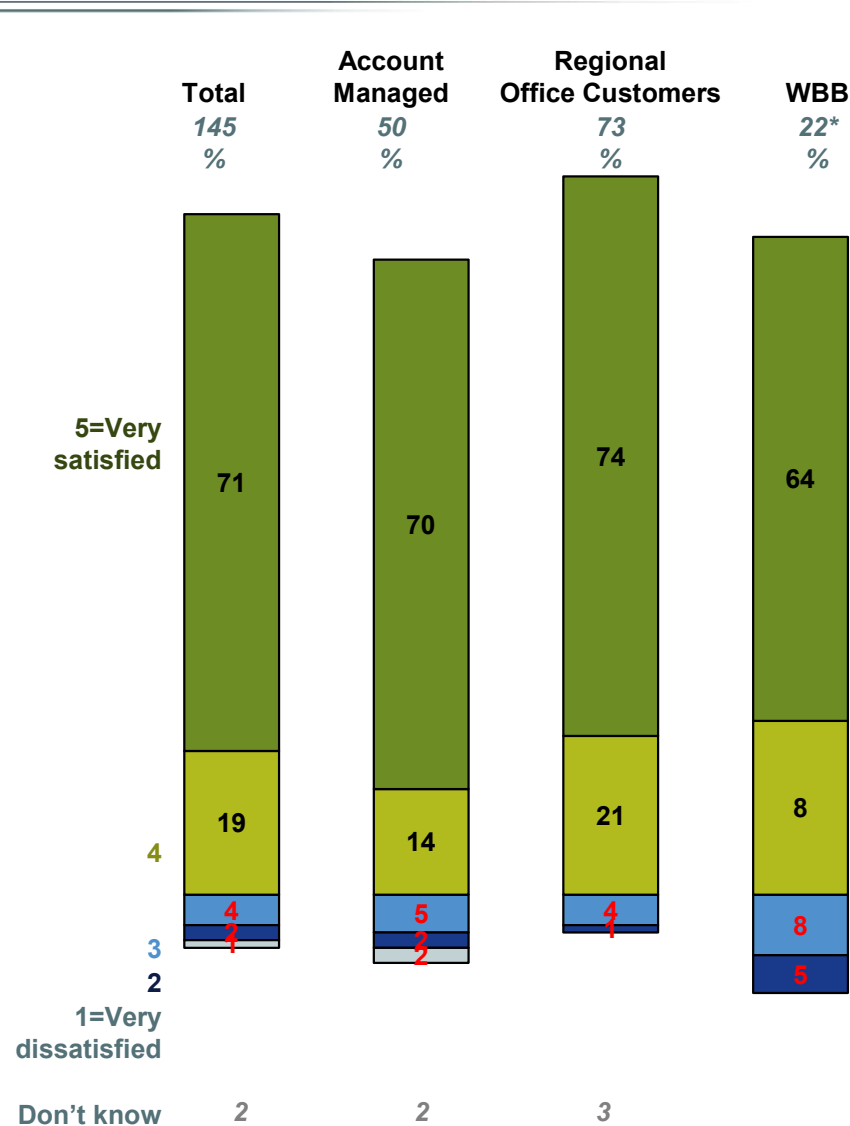
PEOPLE



Key Performance Indicator – People

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

*Small Bases = less than 50

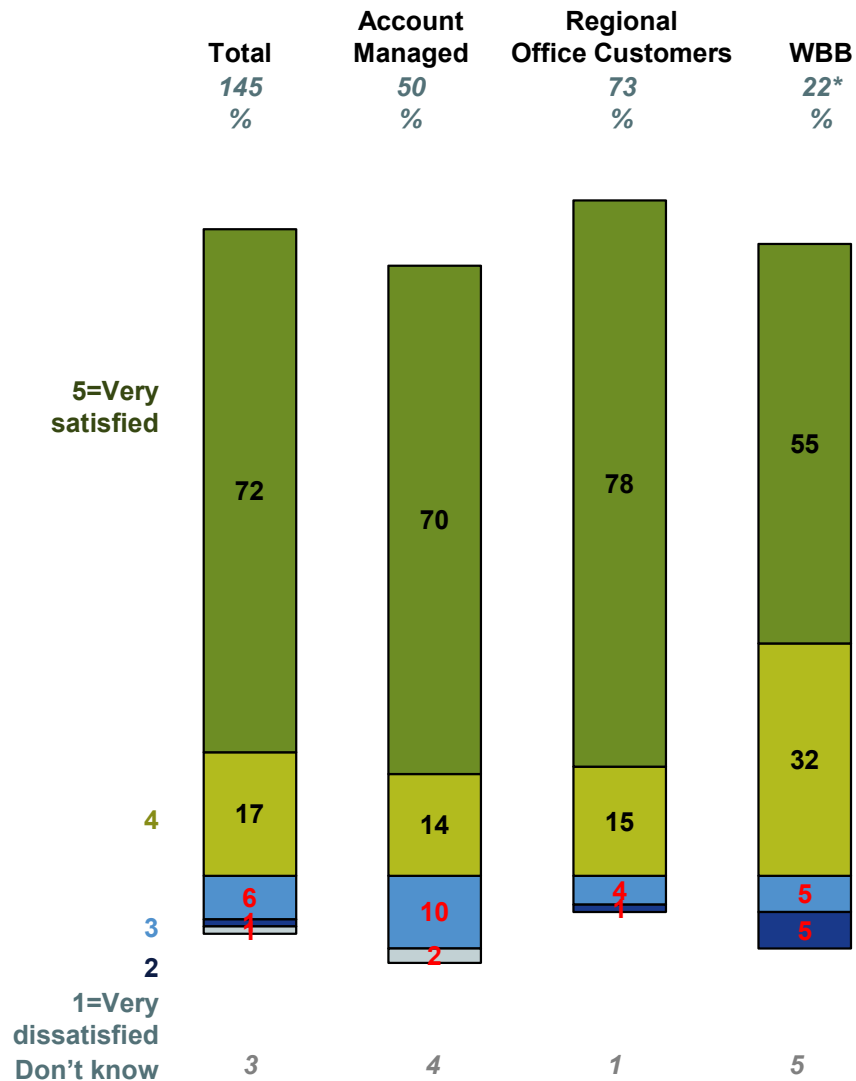


Using a scale from 1 to 5, where 1 means ‘strongly agree’ and 5 means ‘strongly disagree’, to what extent do you agree or disagree that Invest NI ...? [Base: 145 Apr’18-Jun’18 (50 Account Managed, 73 Regional Office Customers and 22* WBB)]

Key Performance Indicator – Process Communication

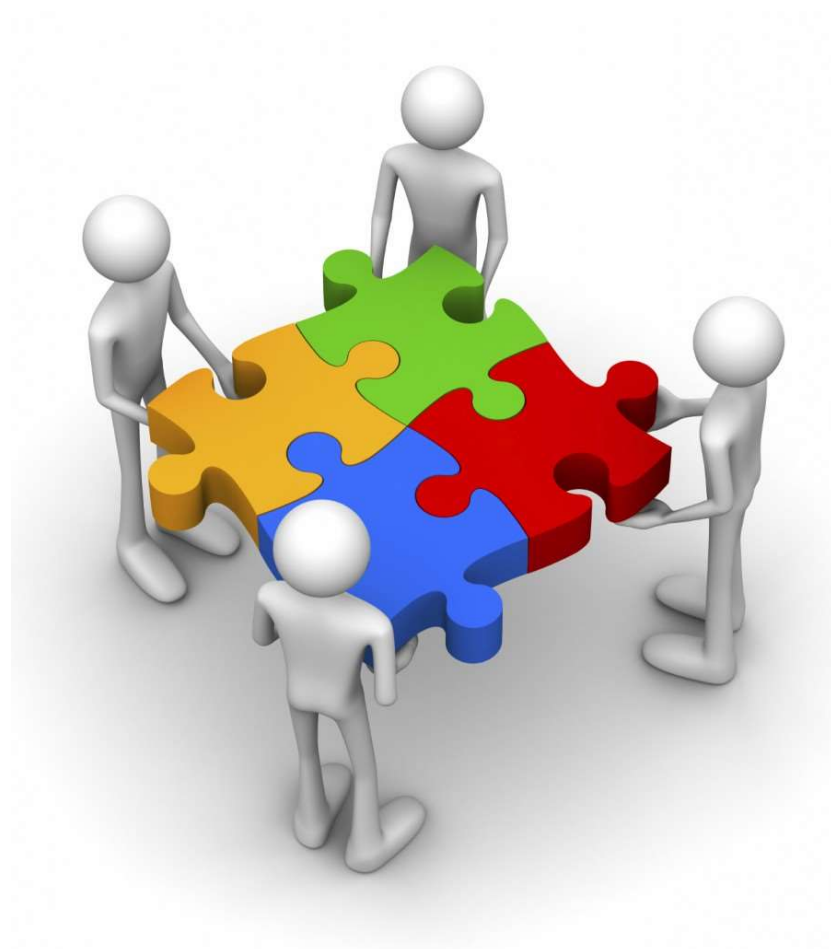
‘Level of satisfaction that the team of people you worked with from Invest NI provided a seamless approach to your business during this engagement’

*Small Bases = less than 50



Using a scale from 1 to 5, where 1 means ‘strongly agree’ and 5 means ‘strongly disagree’, to what extent do you agree or disagree that Invest NI ...? [Base: 145 Apr’18-Jun’18 (50 Account Managed, 73 Regional Office Customers and 22* WBB)]

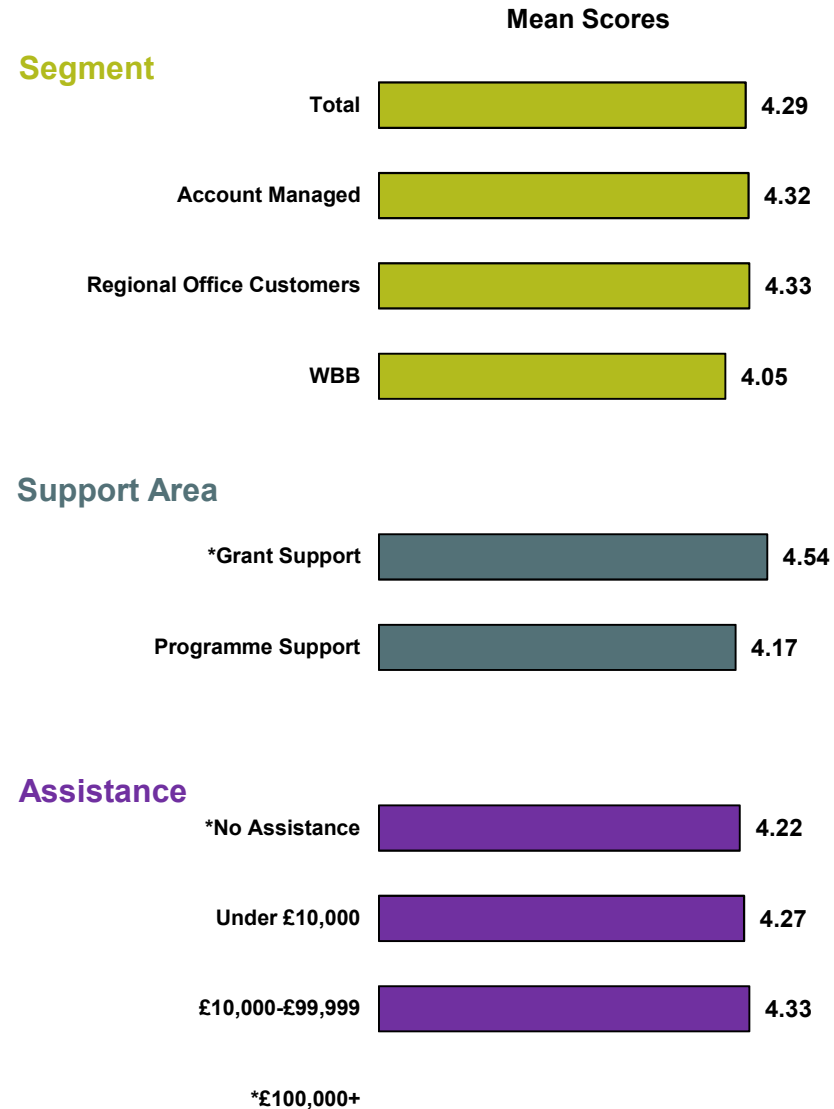
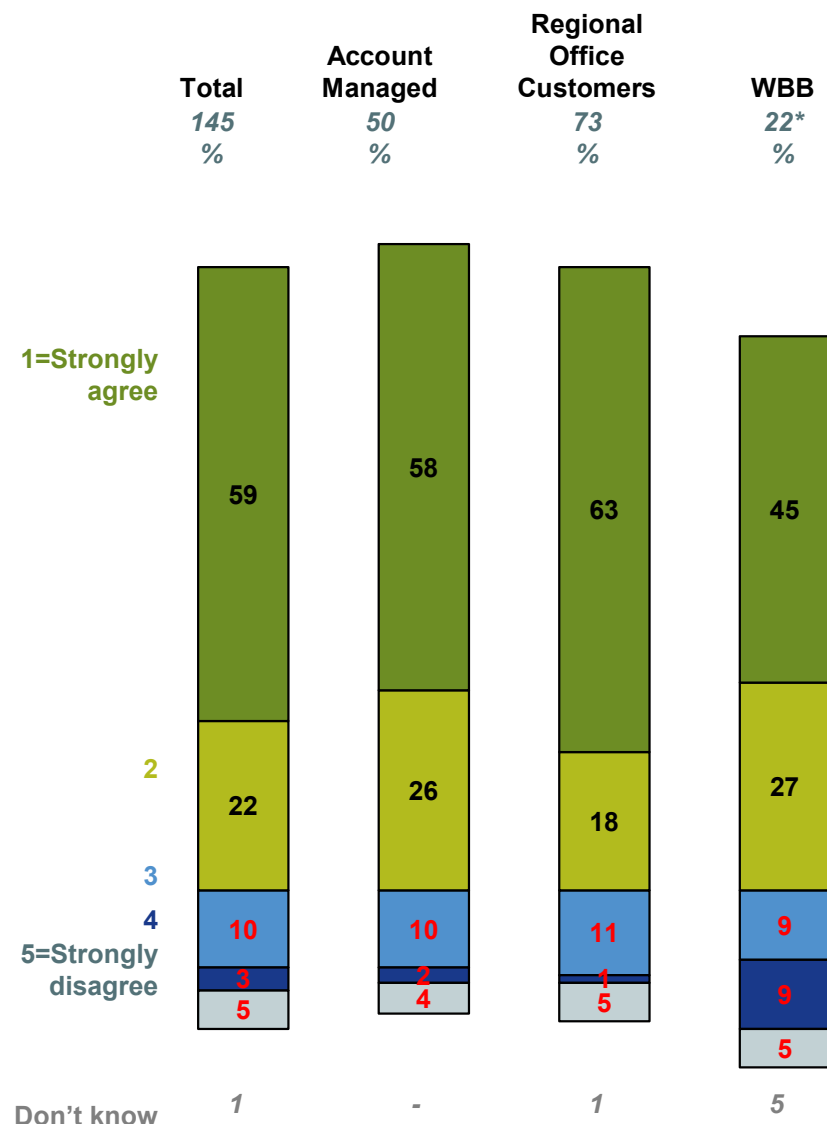
PERFORMANCE



Key Performance Indicator – Performance

‘The Invest NI team is helping to develop my business’

*Small Bases = less than 50

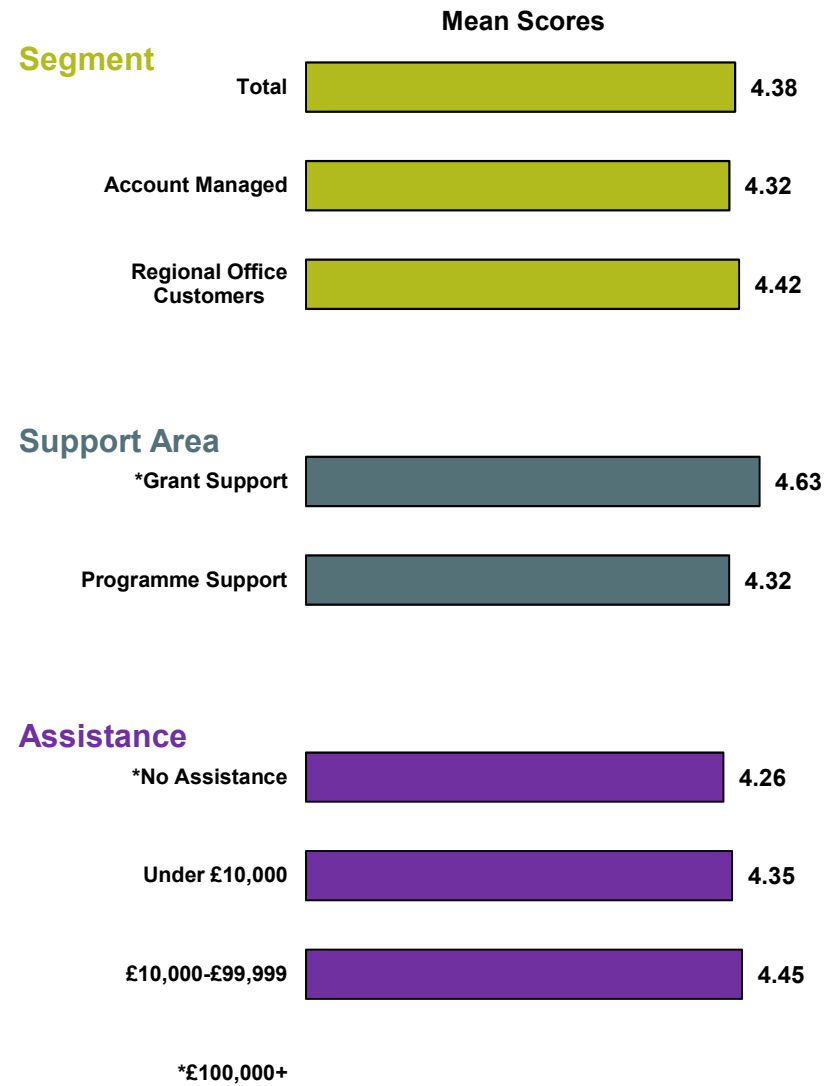
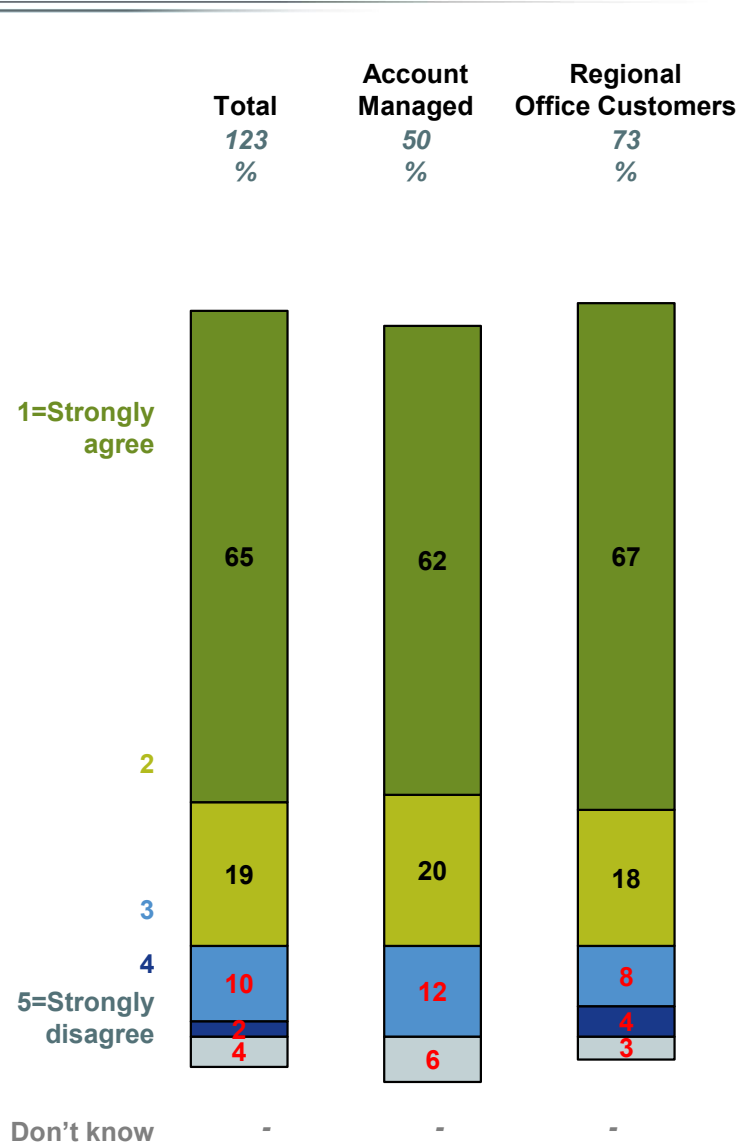


Using a scale from 1 to 5, where 1 means ‘strongly agree’ and 5 means ‘strongly disagree’, to what extent do you agree or disagree that Invest NI ...? [Base: 145 Apr'18-Jun'18 (50 Account Managed, 73 Regional Office Customers and 22* WBB)]

Key Performance Indicator – Performance

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

**Small Bases = less than 50*

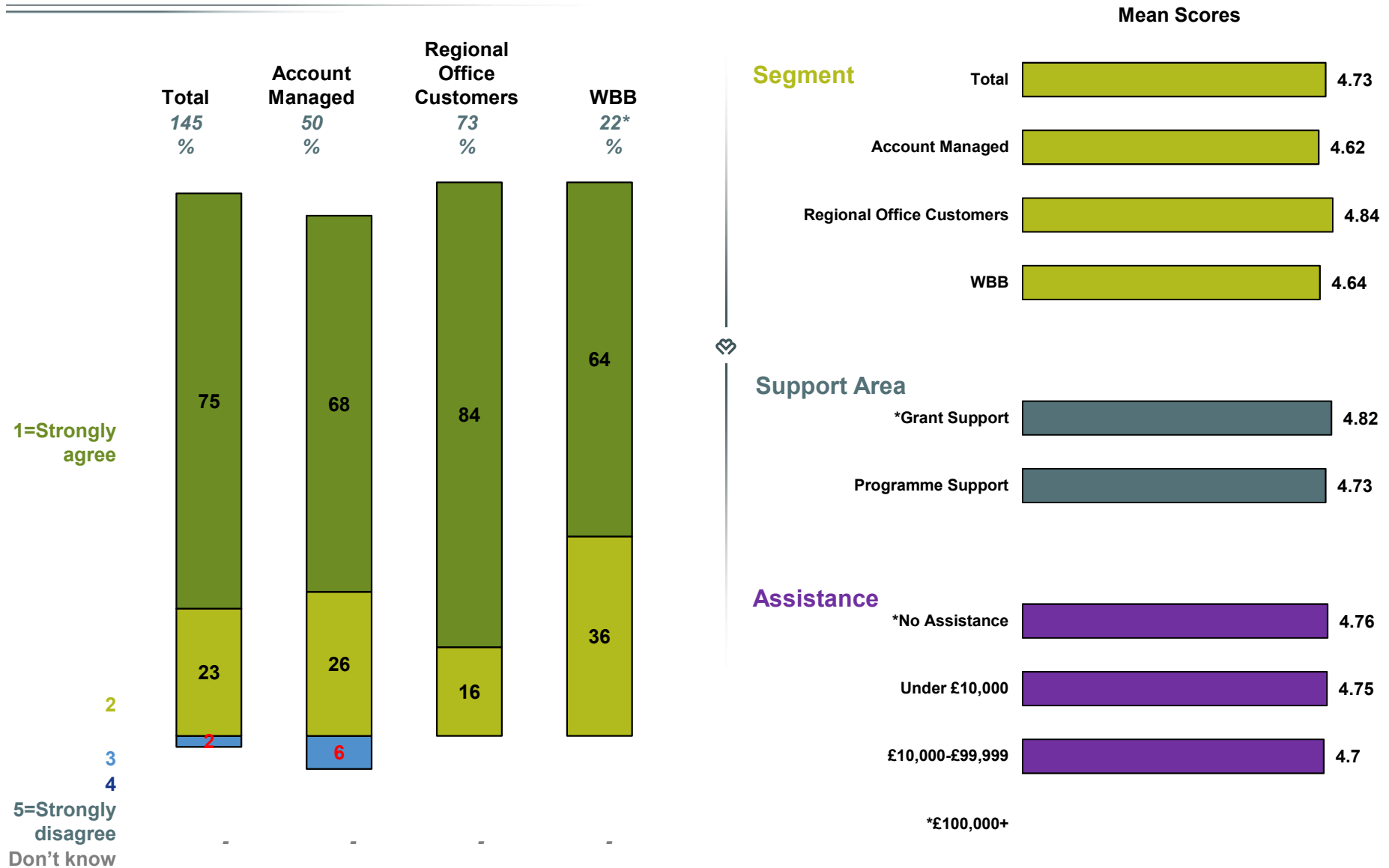


Using a scale from 1 to 5, where 1 means 'strongly agree' and 5 means 'strongly disagree', to what extent do you agree or disagree that Invest NI ...? [Base: 123 Apr'18-Jun'18 (50 Account Managed and 73 Regional Office Customers)]

Key Performance Indicator – Performance

‘Invest NI acts with professionalism and integrity’

**Small Bases = less than 50*

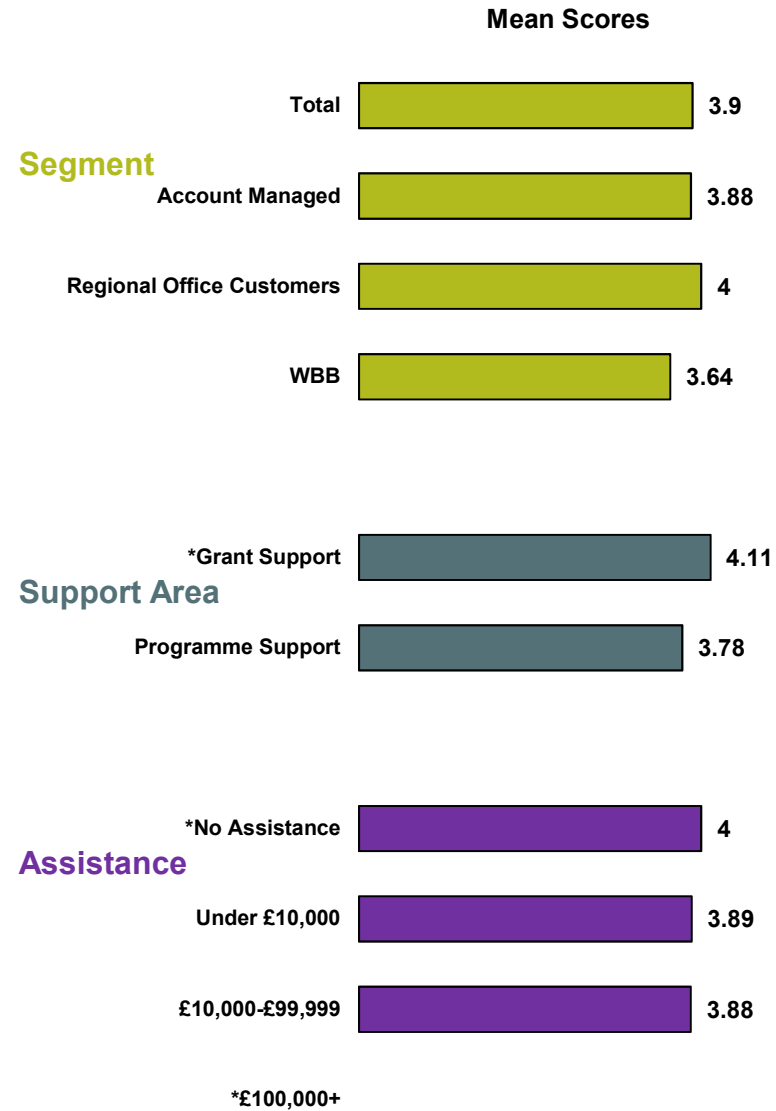
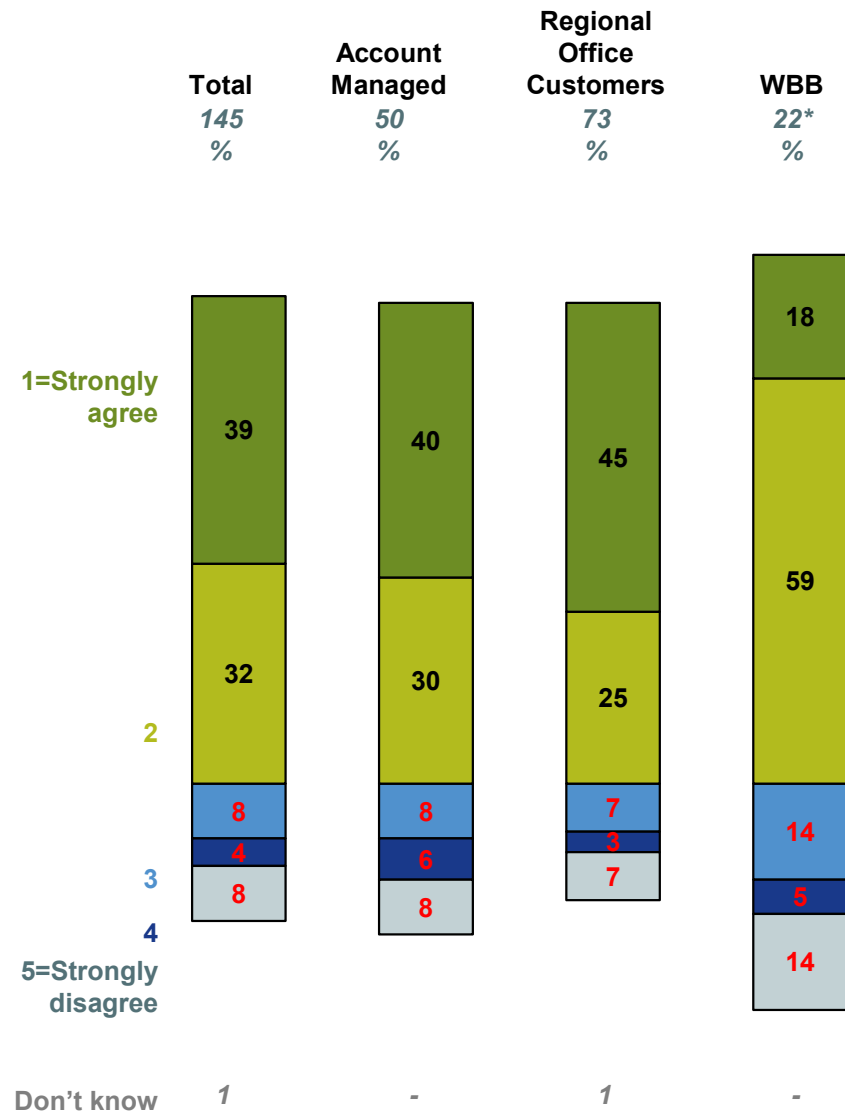


Using a scale from 1 to 5, where 1 means 'strongly agree' and 5 means 'strongly disagree', to what extent do you agree or disagree that Invest NI ...? [Base: 145 Apr'18-Jun'18 (50 Account Managed, 73 Regional Office Customers and 22* WBB)]

Key Performance Indicator – Performance

'Invest NI exceeded my expectations'

**Small Bases = less than 50*

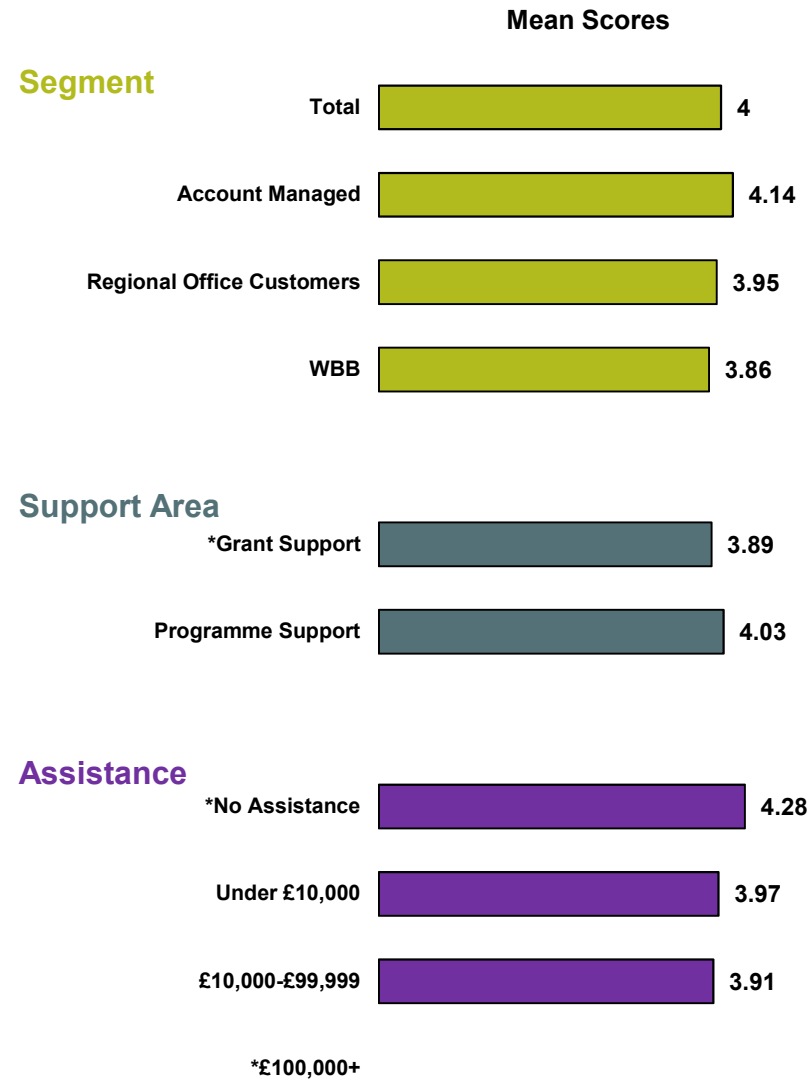
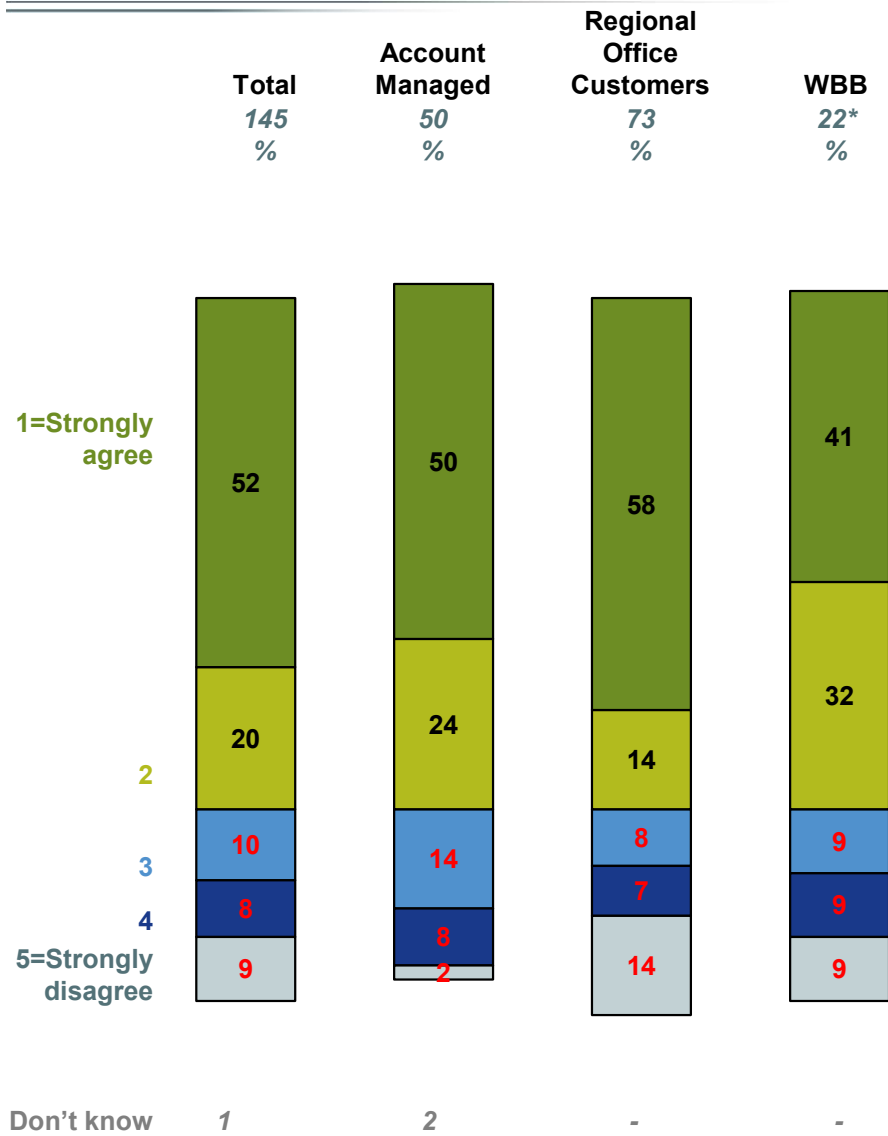


Using a scale from 1 to 5, where 1 means 'strongly agree' and 5 means 'strongly disagree', to what extent do you agree or disagree that Invest NI ...? [Base: 145 Apr'18-Jun'18 (50 Account Managed, 73 Regional Office Customers and 22* WBB)]

Key Performance Indicator – Performance

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

**Small Bases = less than 50*

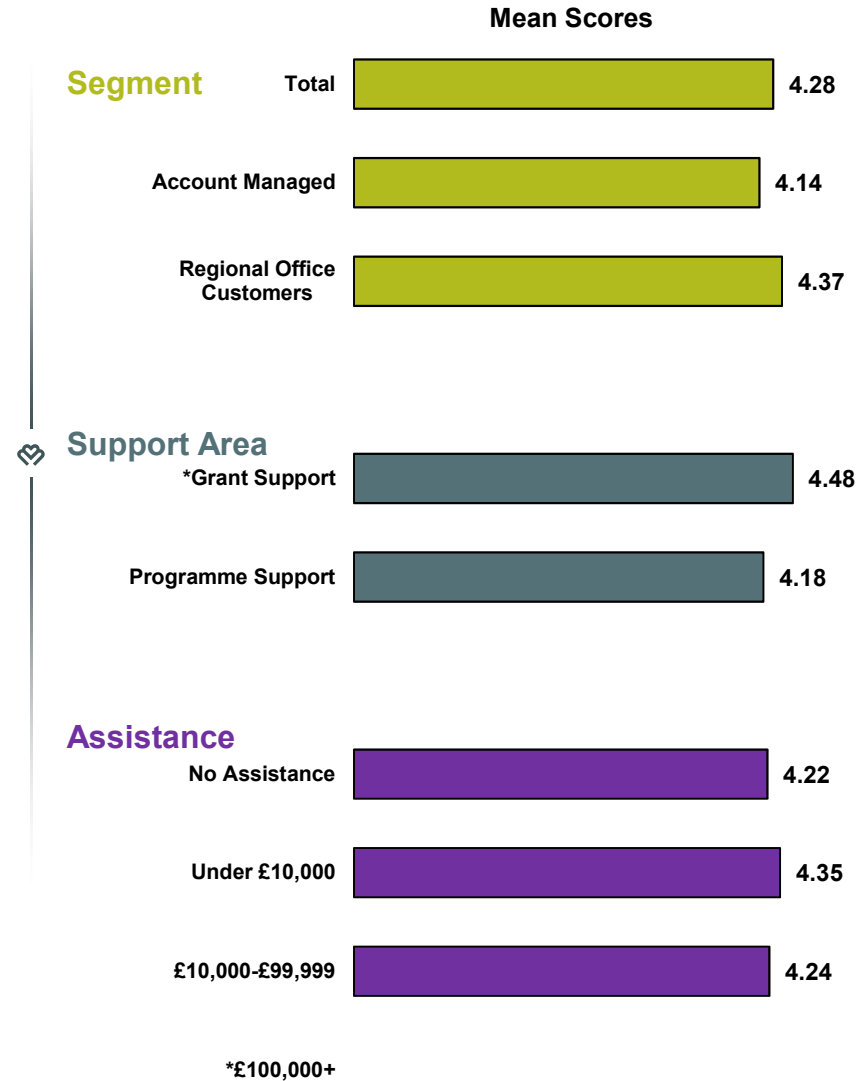
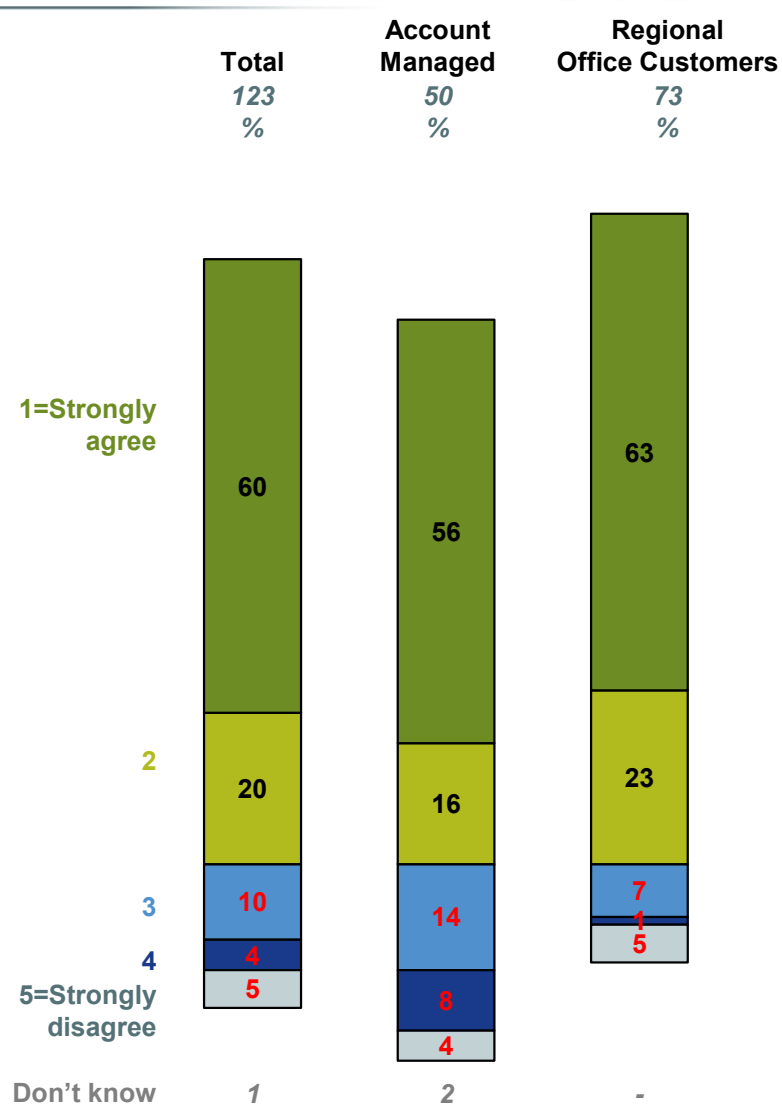


Using a scale from 1 to 5, where 1 means 'strongly agree' and 5 means 'strongly disagree', to what extent do you agree or disagree that Invest NI ...? [Base: 145 Apr'18-Jun'18 (50 Account Managed, 73 Regional Office Customers and 22* WBB)]

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'

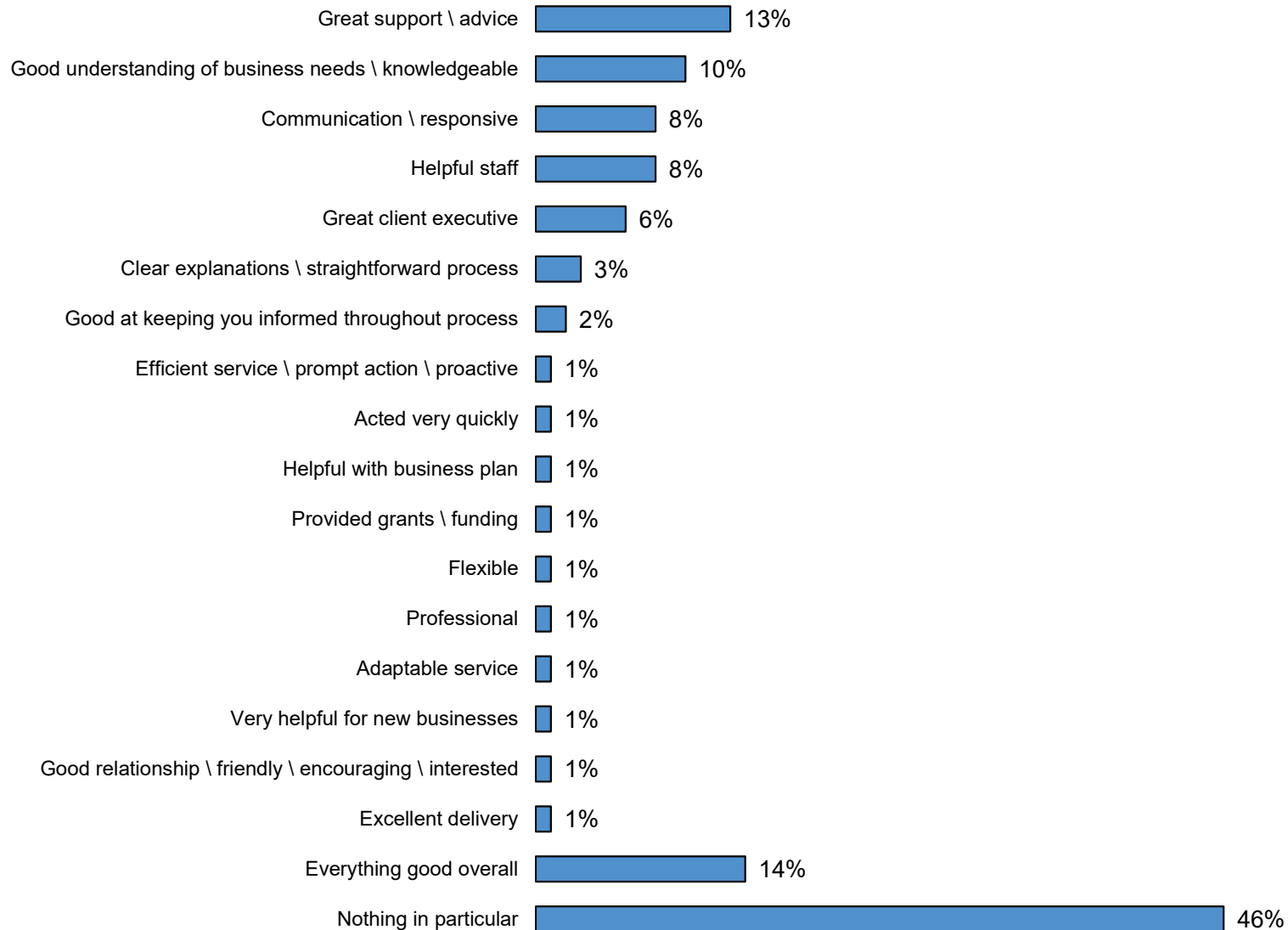
**Small Bases = less than 50*



Using a scale from 1 to 5, where 1 means 'strongly agree' and 5 means 'strongly disagree', to what extent do you agree or disagree that Invest NI ...? [Base: 123 Apr'18-Jun'18 (50 Account Managed and 73 Regional Office Customers)]

Key Performance Indicator – Performance

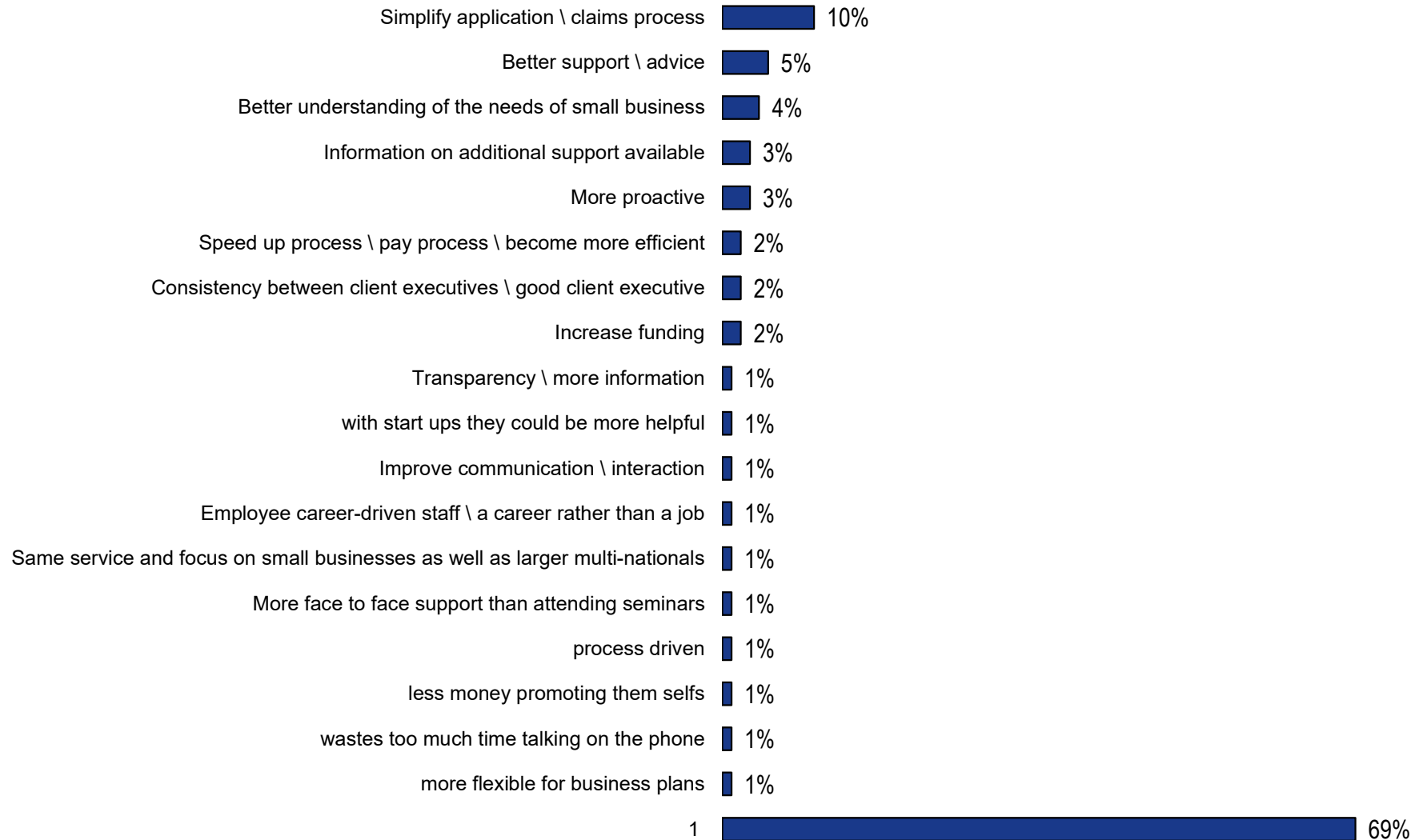
‘What Invest NI did particularly well’



Is there anything that you think Invest NI did particularly well in the lead up to your offer of assistance?
[Base: 145 Apr'18-Jun'18 (50 Account Managed, 73 Regional Office Customers and 22* WBB)]

Key Performance Indicator – Performance

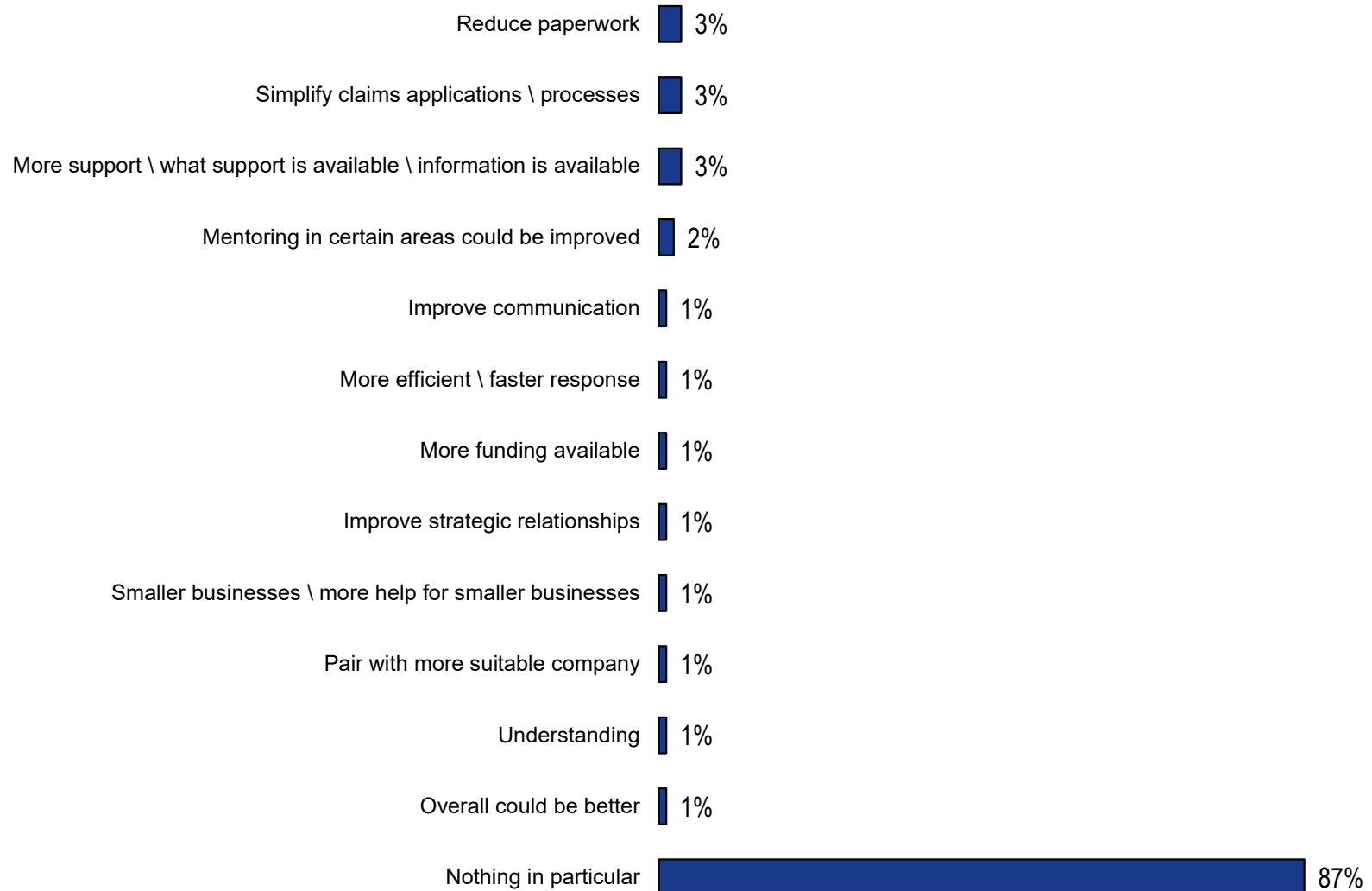
‘Anything organisation could do to improve the overall service they provide’



Thinking about your recent personal experience of Invest NI is there anything you think the organisation could do to improve the overall service they provide? [Base: 145 Apr'18-Jun'18 (50 Account Managed, 73 Regional Office Customers and 22* WBB)]

Key Performance Indicator – Performance

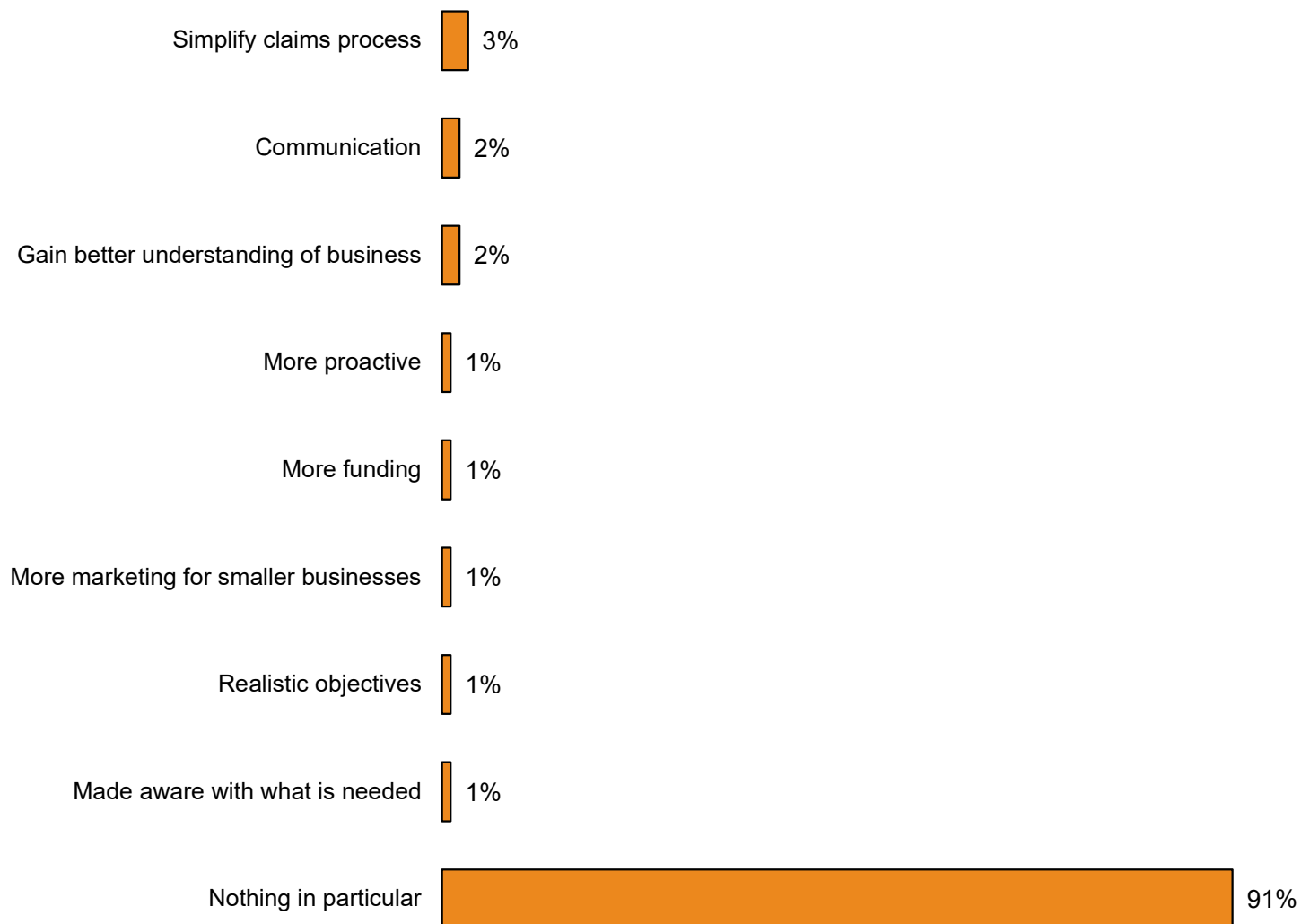
‘Anything organisation could have done better’



Thinking about your recent personal experience of Invest NI is there anything you think the organisation could have done better?
[Base: 145 Apr'18-Jun'18 (50 Account Managed, 73 Regional Office Customers and 22* WBB)]

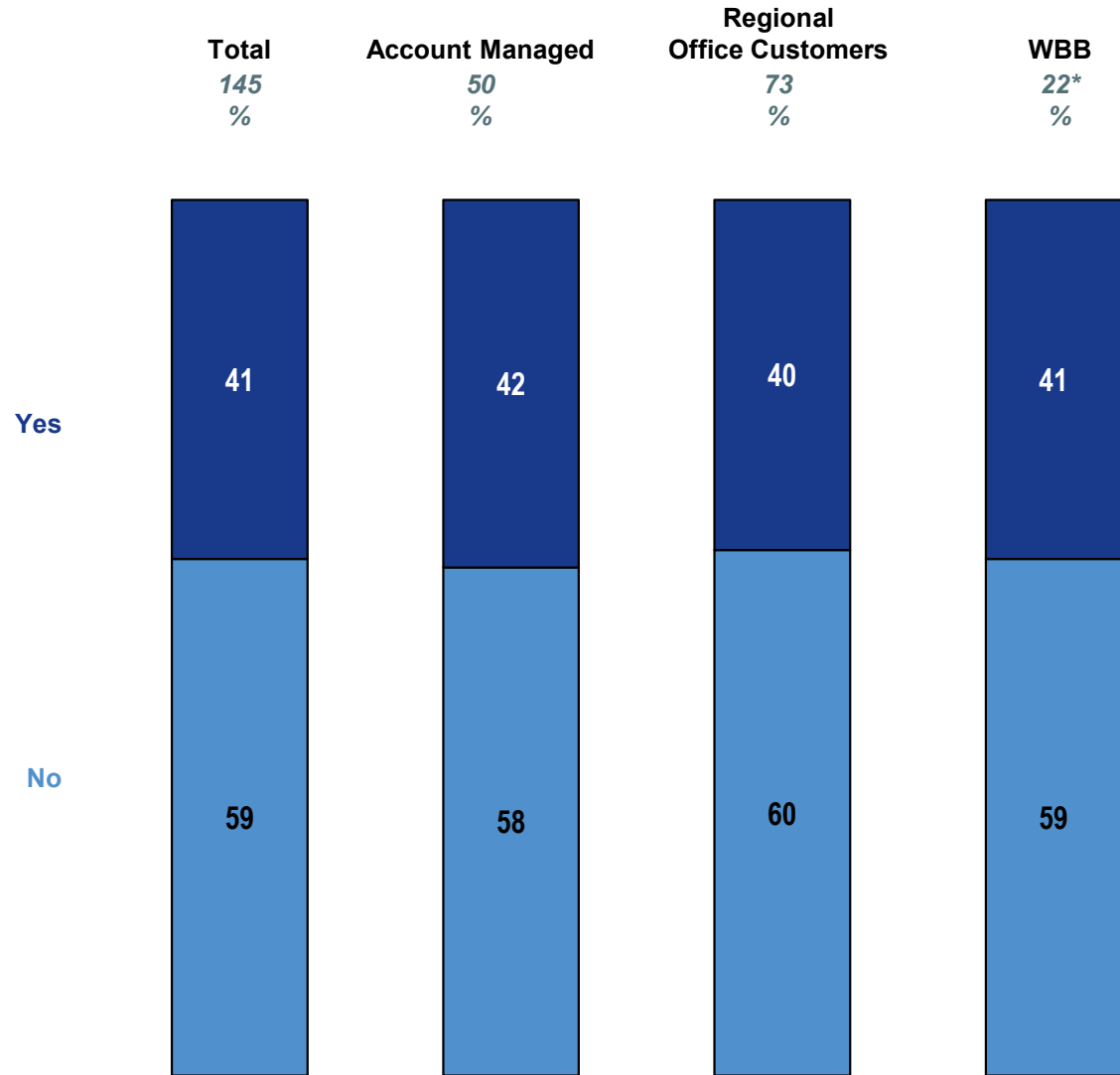
Key Performance Indicator – Performance

‘Anything organisation could have done differently’



Thinking about your recent personal experience of Invest NI is there anything you think the organisation could have done differently?
[Base: 145 Apr'18-Jun'18 (50 Account Managed, 73 Regional Office Customers and 22* WBB)]

Actively Discussing Application for Additional Support



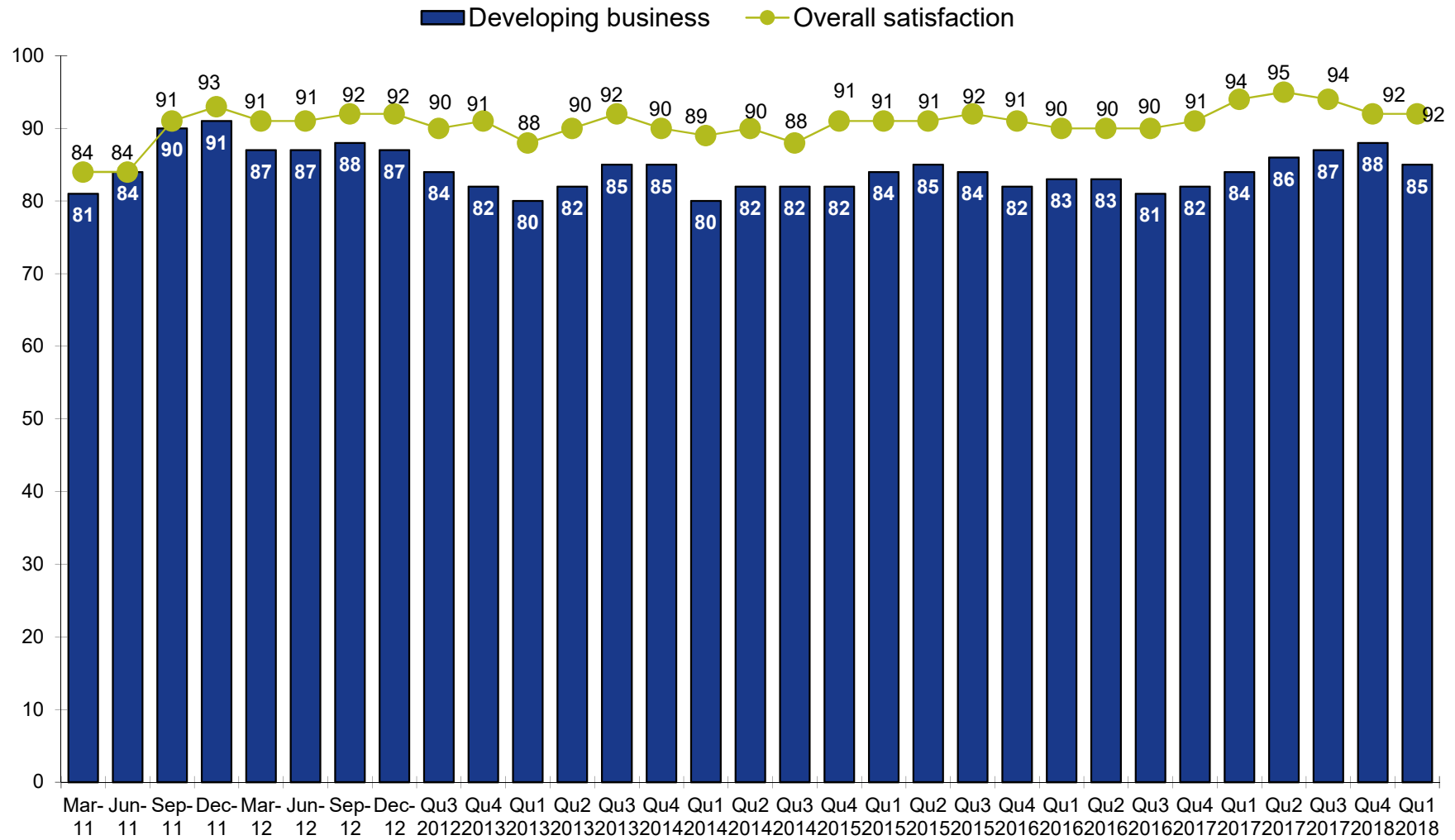
Are you actively discussing an application for additional support services at present?
 [Base: 145 Apr'18-Jun'18 (50 Account Managed, 73 Regional Office Customers and 22* WBB)]

ROLLING AVERAGES



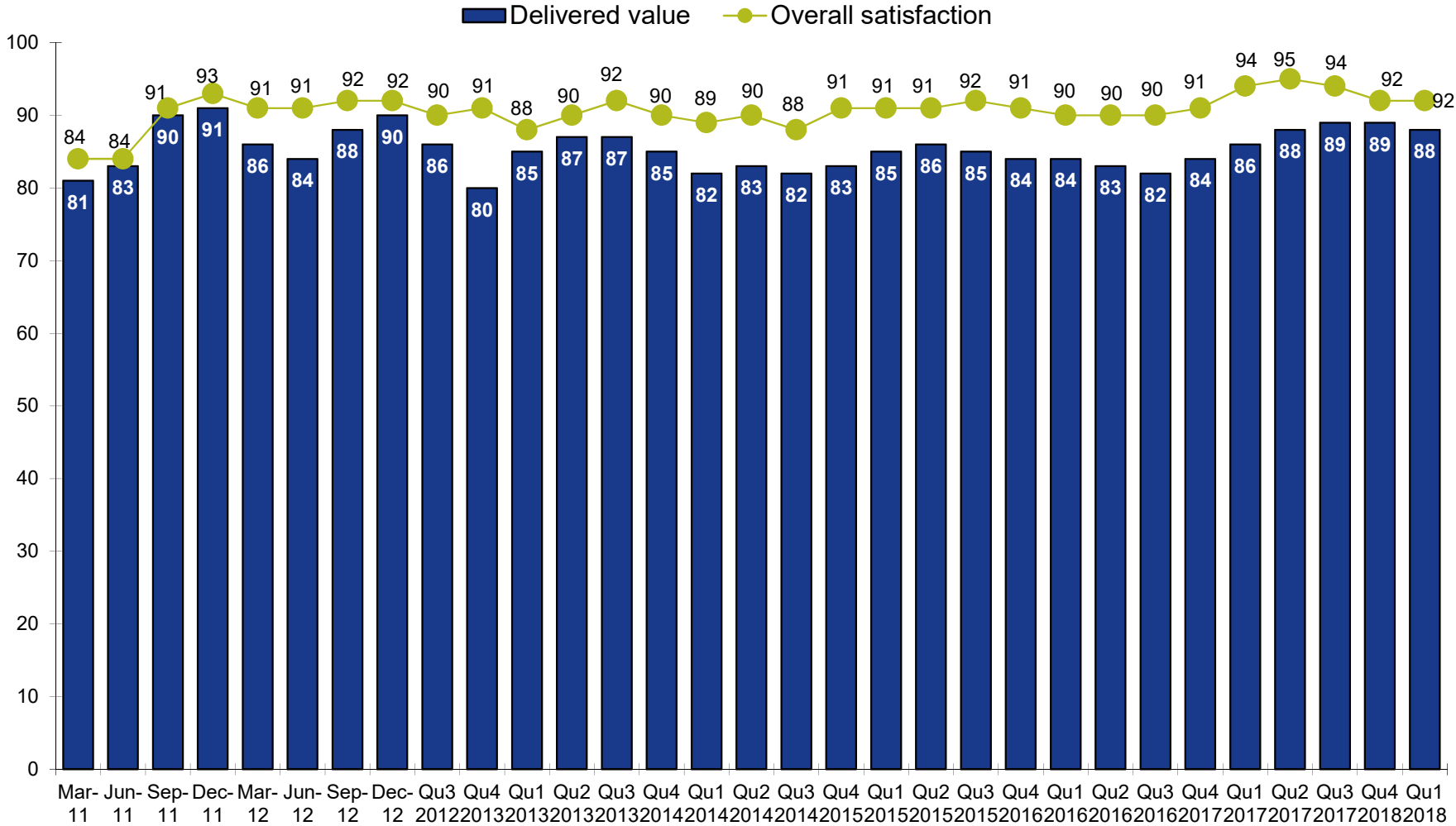
Satisfaction and key driver variables: INI is helping to develop my business

Six month rolling average

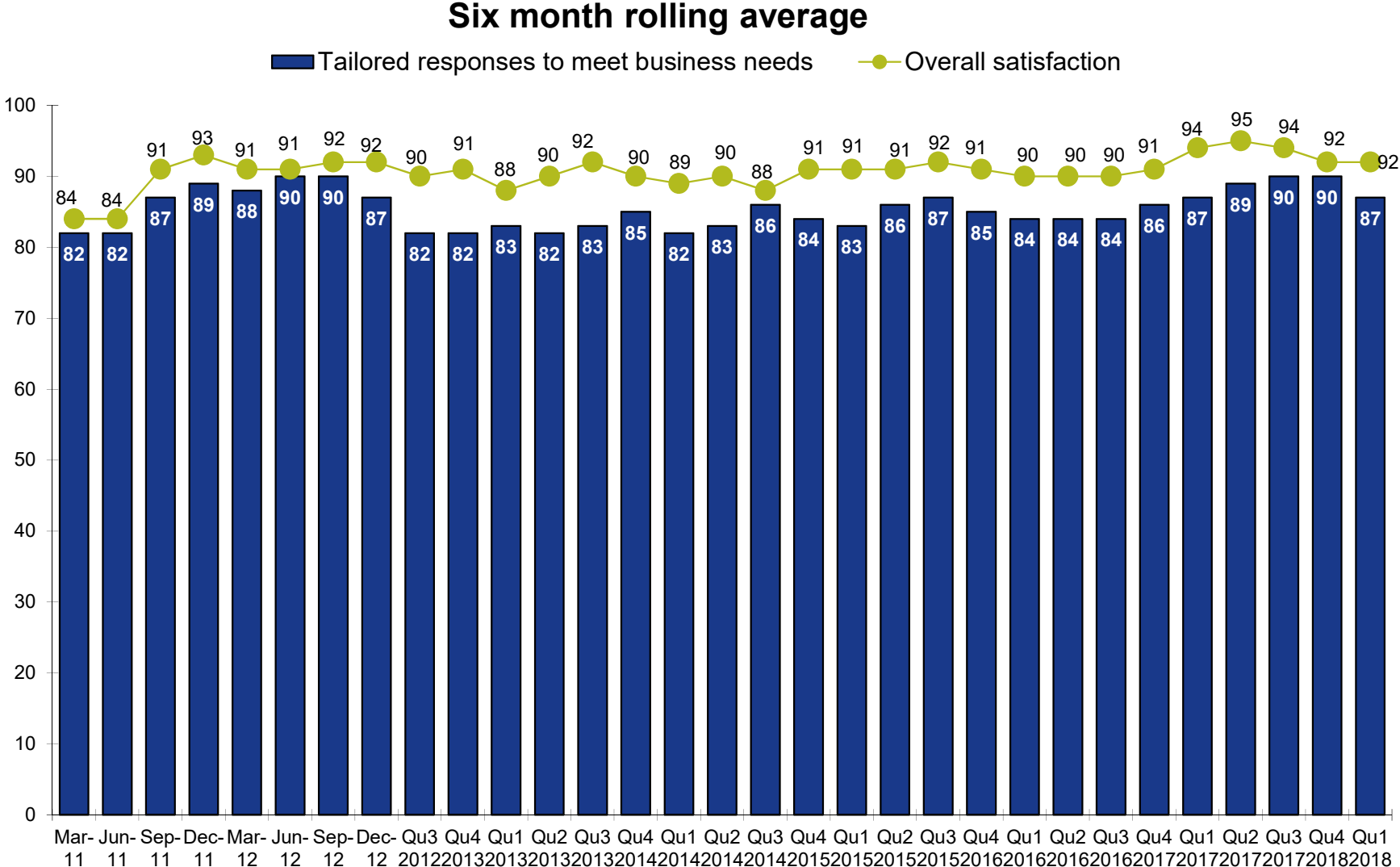


Satisfaction and key driver variables: INI delivered value to my business

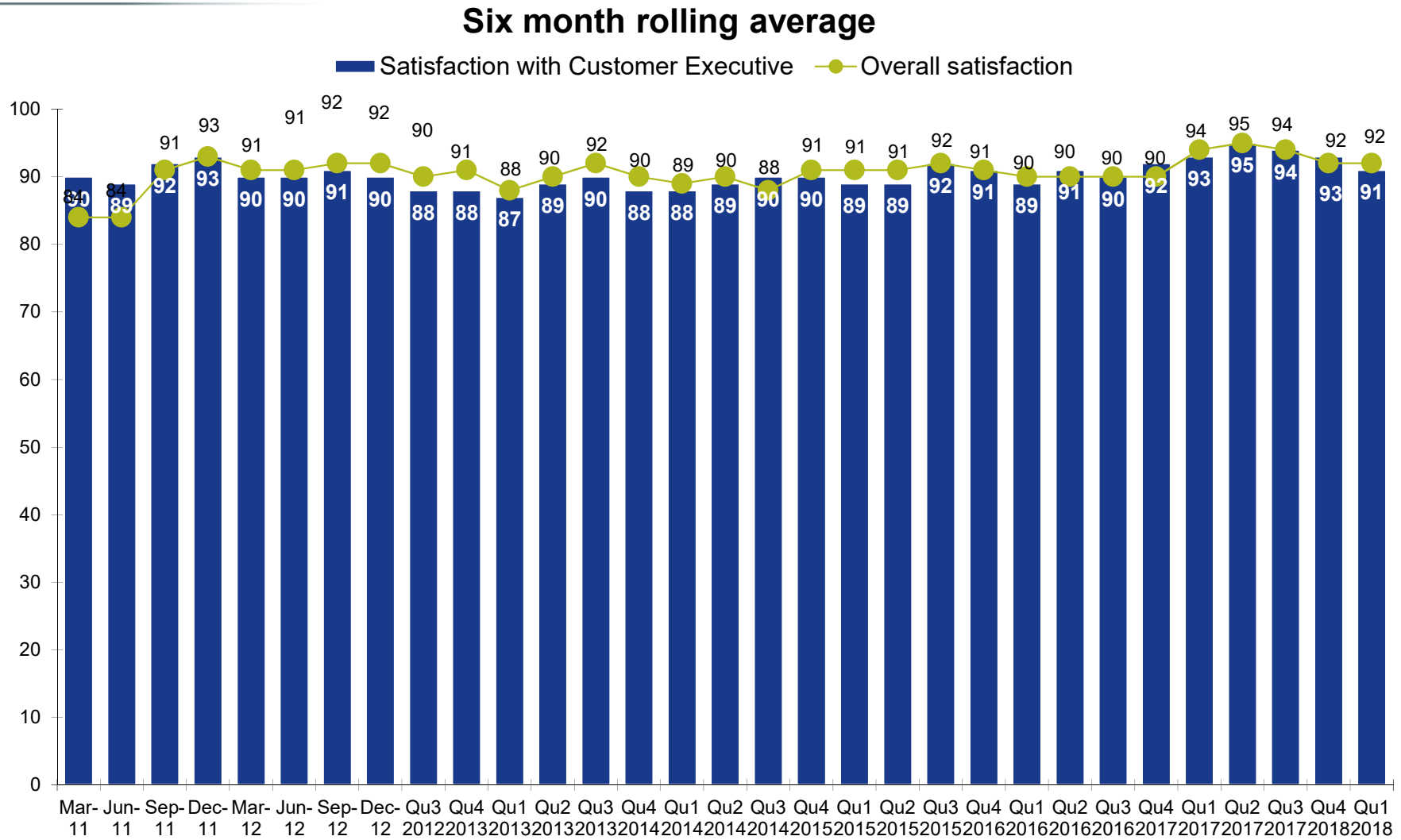
Six month rolling average



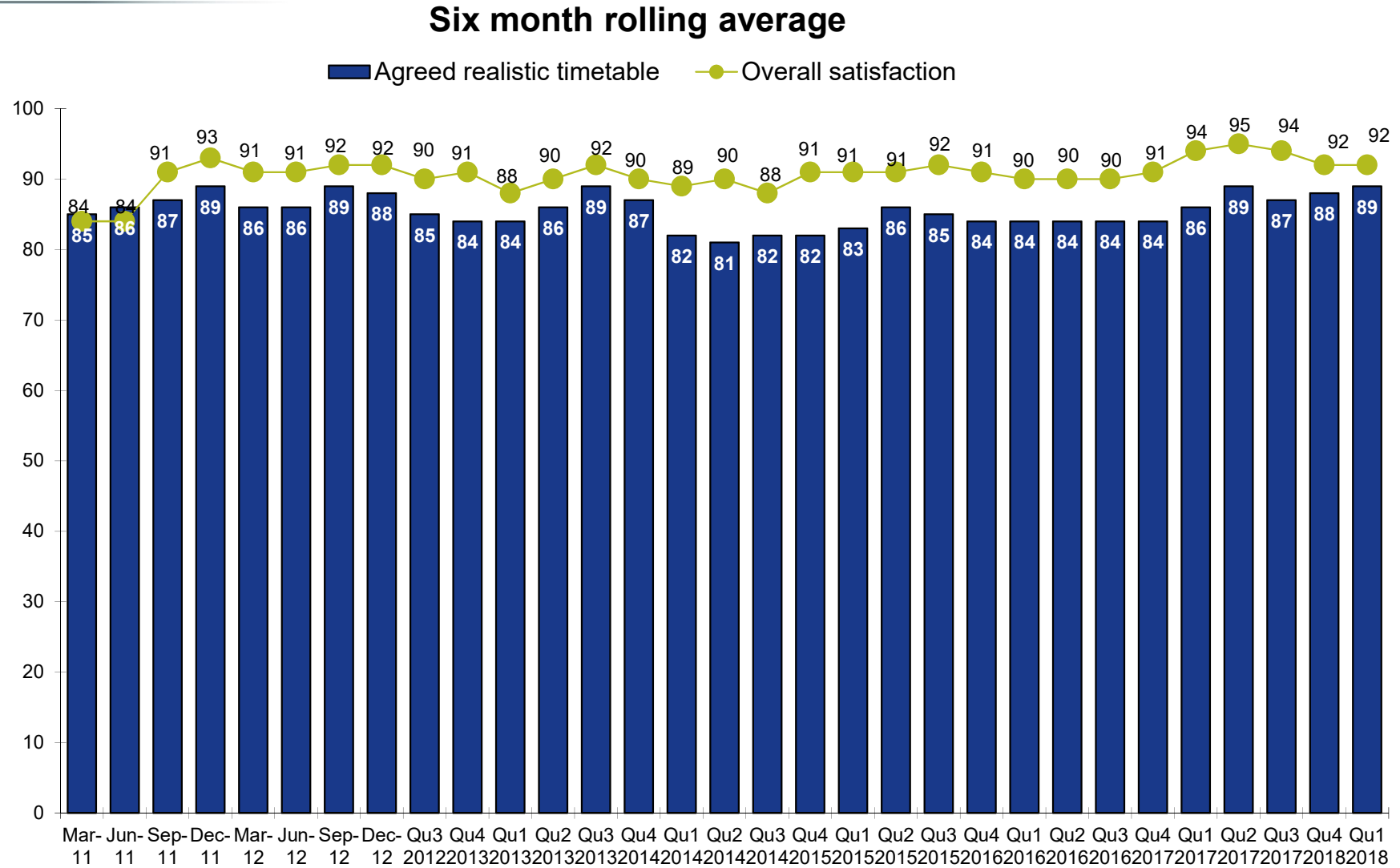
Satisfaction and key driver variables: INI tailored their responses to meet your business needs



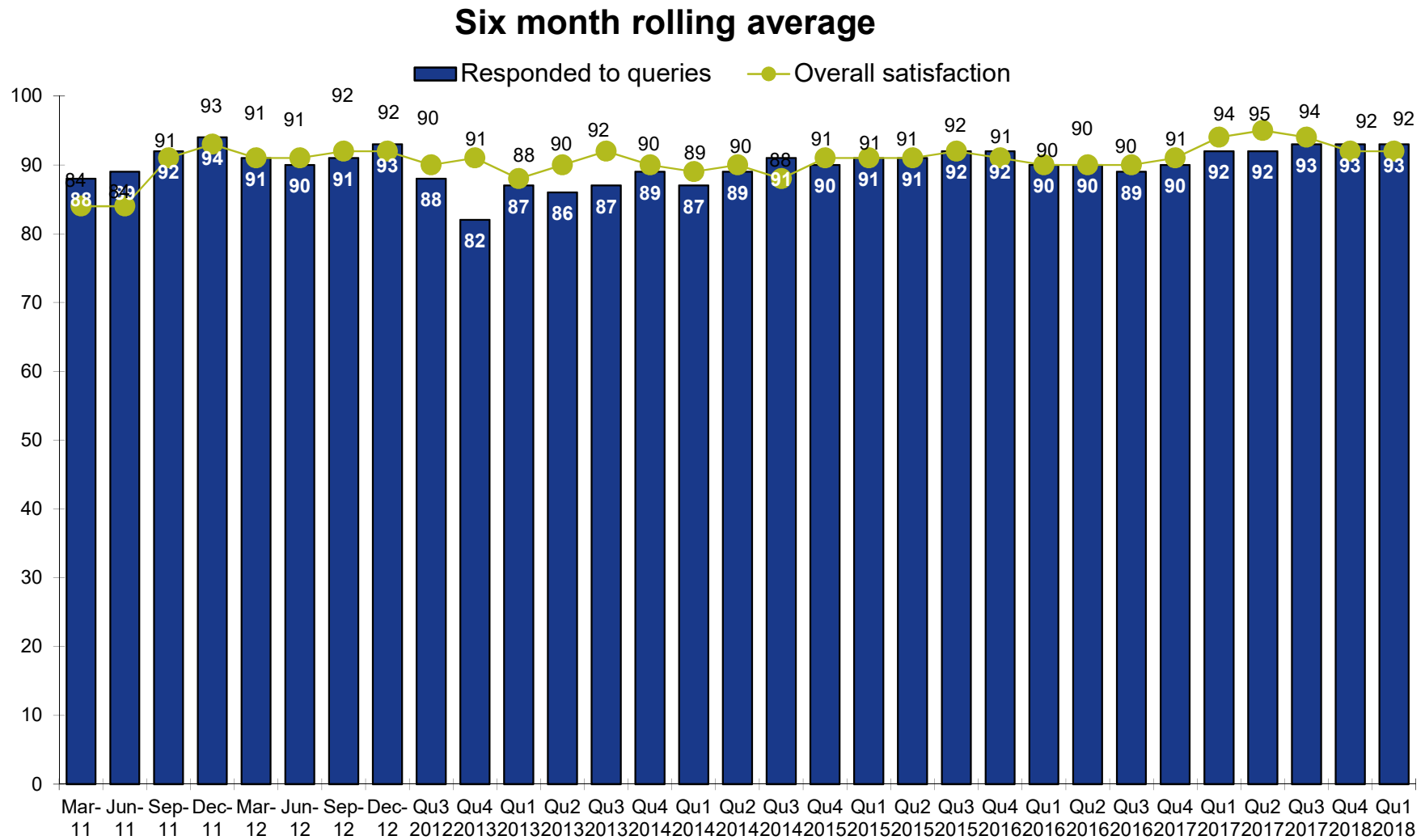
Satisfaction and key driver variables: Satisfaction with Client Executive



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

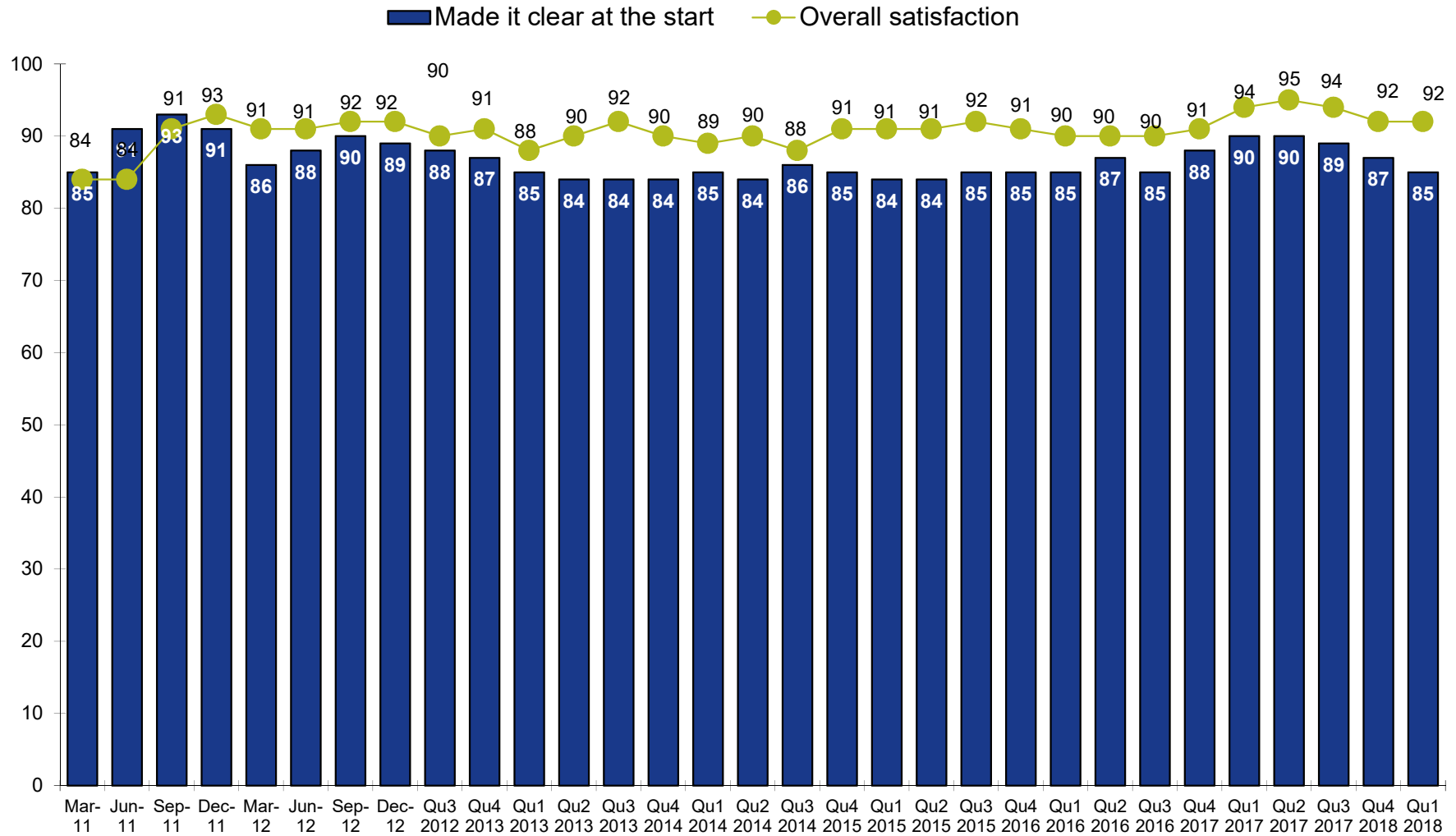


Satisfaction and key driver variables: INI responded to your queries within a reasonable timeframe



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

Six month rolling average



DETAILED PERFORMANCE MEASURES



Performance Overall

Average Rating	
Jan-Mar '16	4.43
Apr-Jun '16	4.46
Jul-Oct '16	4.33
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

Customers



Process - Management



Process - Communication



■ Apr-Jun

Using a scale from 1 to 5, where 1 means 'strongly agree' and 5 means 'strongly disagree', to what extent do you agree or disagree that Invest NI ...? [Base: 145 Apr'18-Jun'18]

Performance by Segment: Account Managed Customers

Base = 50

Average Rating	
Jan-Mar '16	4.45
Apr-Jun '16	4.58
Jul-Oct '16	4.41
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



Process - Management



Process - Communication



■ Apr-Jun

Using a scale from 1 to 5, where 1 means 'strongly agree' and 5 means 'strongly disagree', to what extent do you agree or disagree that Invest NI ...? [Base: 50 Apr'18-Jun'18]

Performance by Segment: Regional Office Customers

Base = 73



Process - Management



Process - Communication



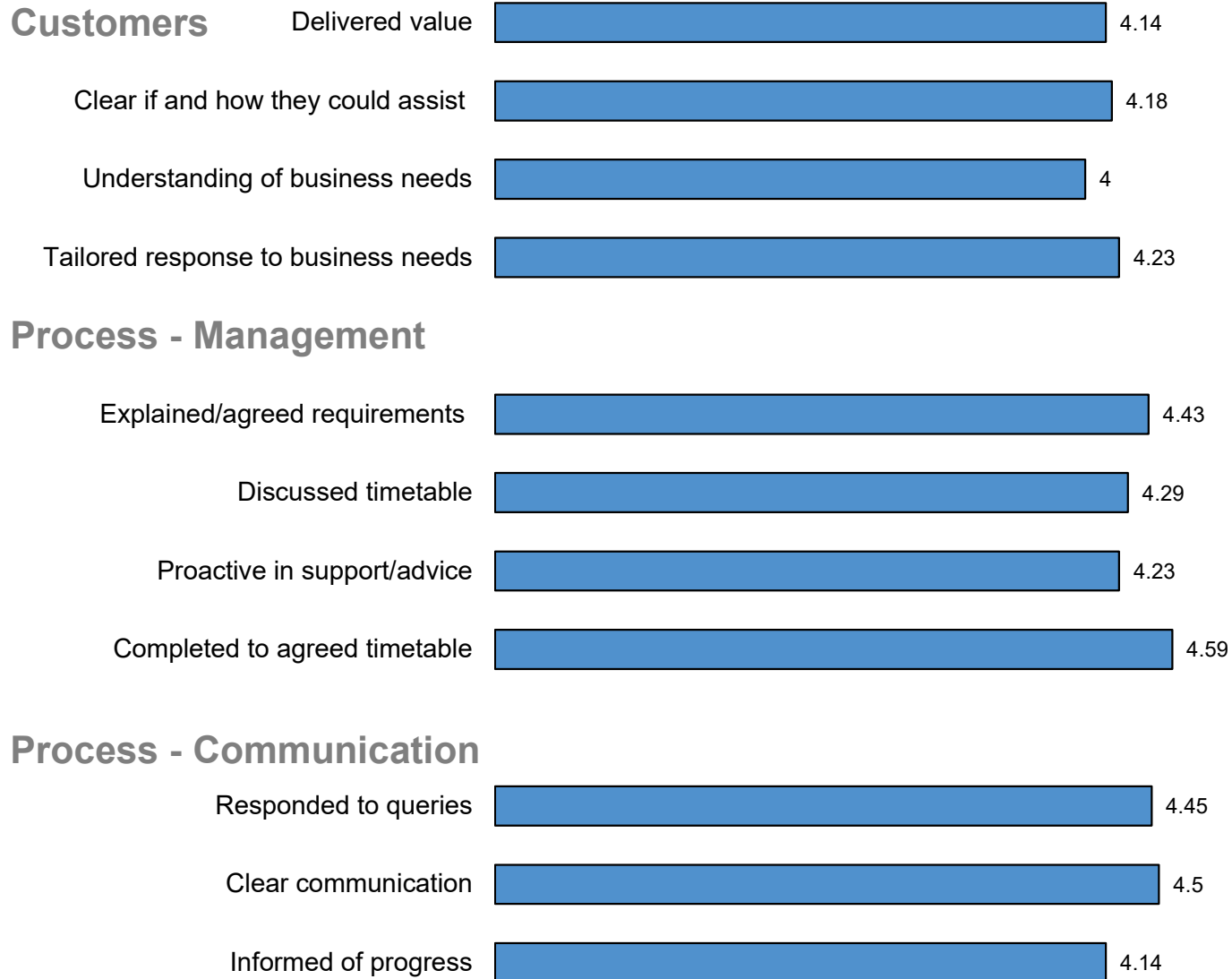
Average Rating	
Jan-Mar '16	4.49
Apr-Jun '16	4.38
Jul-Oct '16	4.25
Nov-Mar '17	4.41
Apr-Jun'17	4.42
Jul-Sep'17	4.49
Oct-Dec'17	4.36
Jan-Mar'18	4.48
Apr-Jun'18	4.60

■ Apr-Jun

Using a scale from 1 to 5, where 1 means 'strongly agree' and 5 means 'strongly disagree', to what extent do you agree or disagree that Invest NI ...? [Base: 73 Apr'18-Jun'18]

Performance by Segment: Wider Business Base

Base = 22*



Average Rating	
Jan-Mar '16	4.25
Apr-Jun '16	4.37
Jul-Oct '16	4.28
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

■ Apr-Jun

Using a scale from 1 to 5, where 1 means 'strongly agree' and 5 means 'strongly disagree', to what extent do you agree or disagree that Invest NI ...? [Base: 22* Apr18-Jun'18] *Small Bases = less than 50