

Export Compass v1.3

Re-testing 09/02/2021

What we did

- The data team made UI/UX improvements based upon the last round of user testing
- We re-issued the link to the users we tested with and asked them to share their thoughts (7 users)

Summary

- Most people found this new version easier to use
- It's a powerful analytical tool, but people aren't sure how they would use it in their jobs
- Information in the tool is too high-level to be useful
- Clear training guidance is needed

What's working

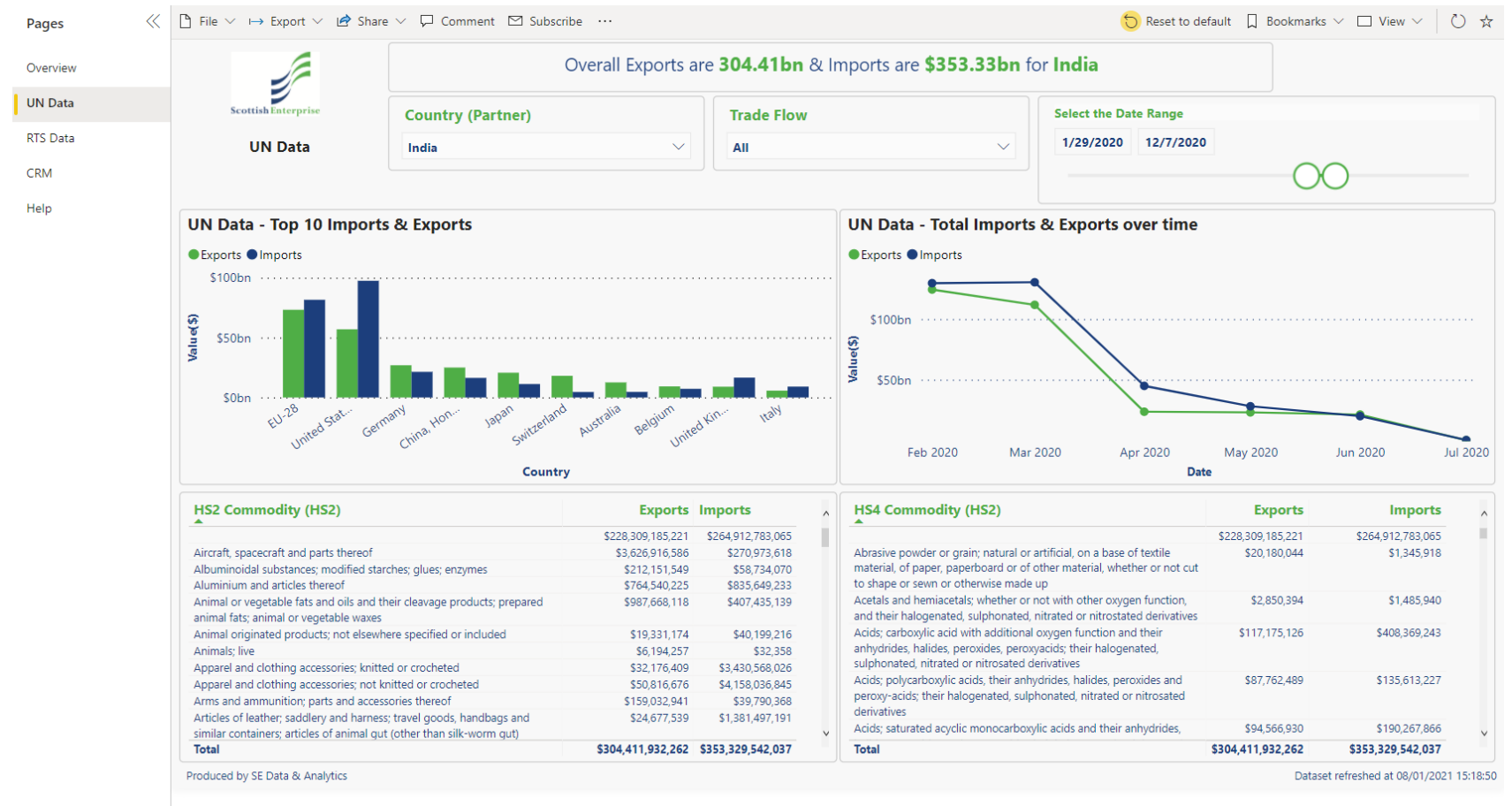
- Generally easier to use than the previous version
- Easier to use than other partner tools, ie HMRC Build Your Own Tables
- Visually it looks good and feels familiar to Dynamics

What isn't working

- It's unclear who would benefit by using this tool – they see it as an analytical tool, not a trade specialist tool
- Most people don't think it goes into enough detail to be relevant to their job
 - "Could be useful for benchmarking Scotland and international markets, identifying areas where we are underperforming and capturing trends if it was more granular"
- How the information populates or is shaded/highlighted can be confusing
- Concerns over whether the data is up to date

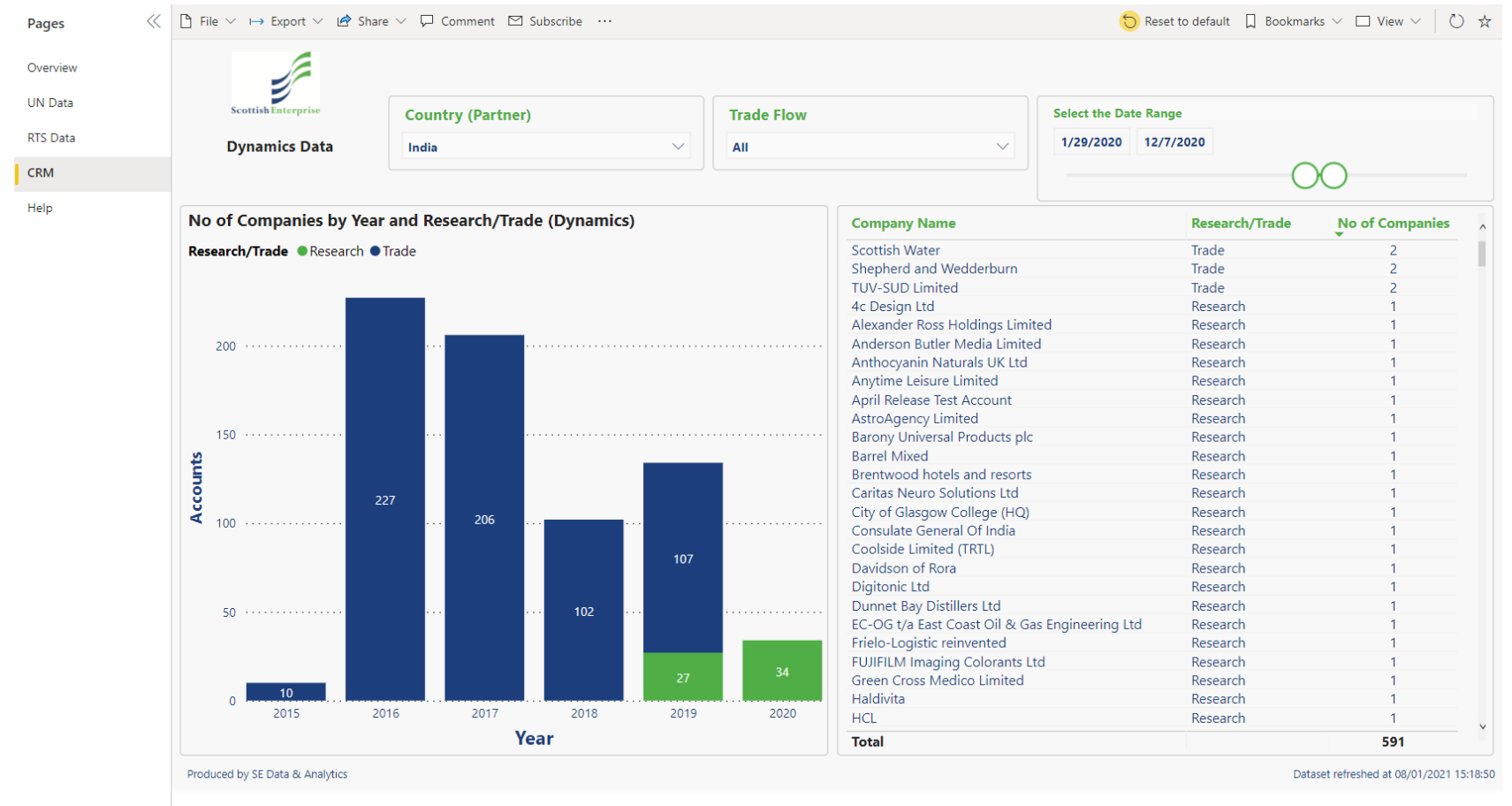
UN data

- Unclear if the data is Scotland or UK level.
- The figures are in \$US – is that standard? Will there be access to a tool where they can convert it?
- For HS2 commodity codes, it would be good to have a number option too that you can type in



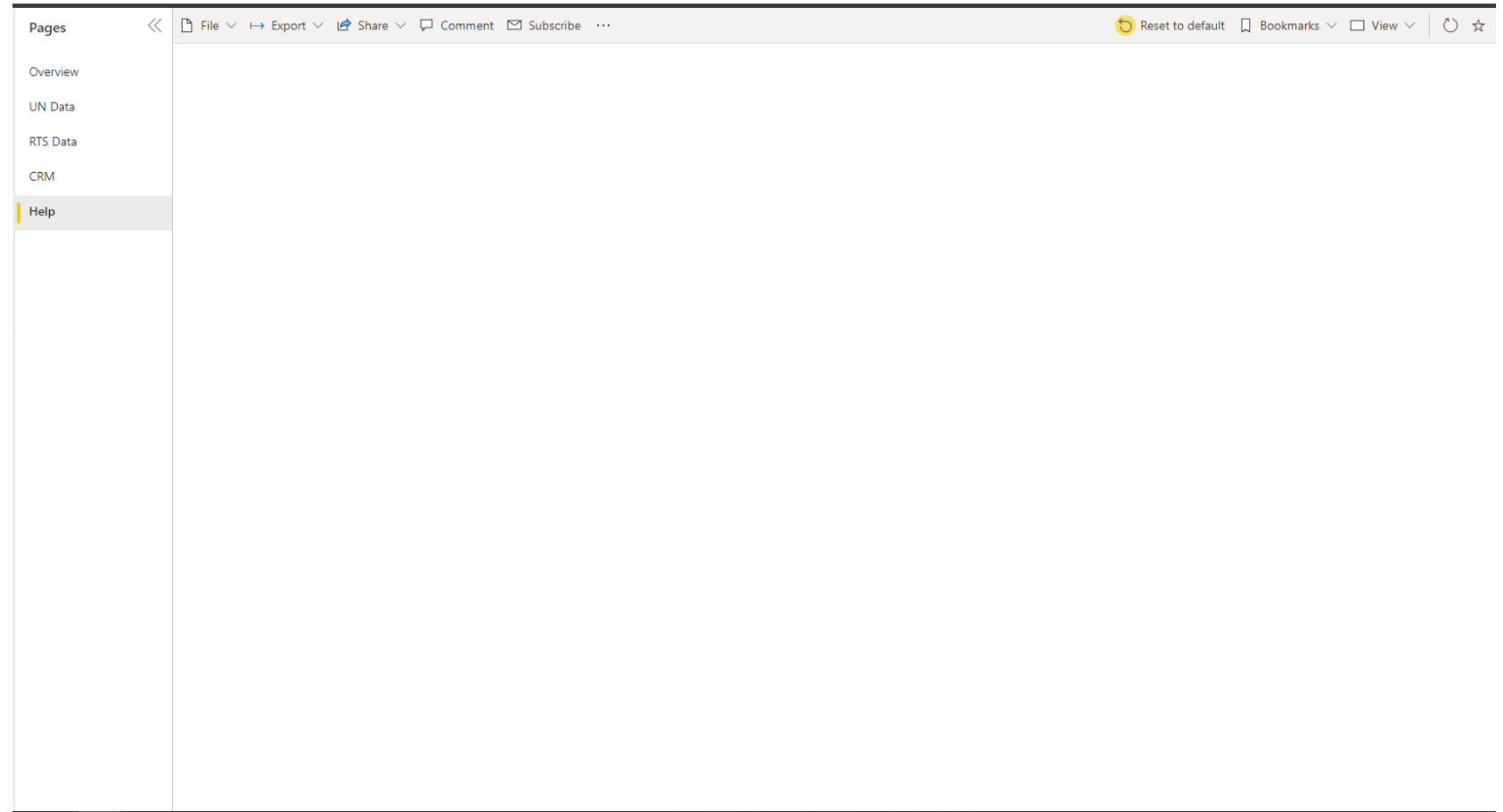
CRM data

- "Who would use this?"
- CRM section is only as good as the information captured
- For international growth, I wouldn't use this tool unless it links to specific export market gaps identified by product sub-category
- For advisers, it would be useful to have a sector filter
- I feel like this could go deeper and link to Dynamics better – I couldn't get to the level I wanted



Help

- This section hasn't been populated yet
- But people feel that clear training guidance is needed, ie what buttons to push to get what information
- Because of the complexity, this tool should be given to staff that are going to use it on a regular basis



Suggestions from the team

- Export function could be improved – it needs to be able to export to Excel. The PDF/PPT exports seem to only include the first page and take too long.
- If trade specialists used this tool, it would be better if we could add more info about our companies and areas of focus they have/what they are doing in those markets. This could be useful to our field colleagues too when they are looking to support companies.
- Needs to be more specific
 - Ex: Fish/seafood need to get down to species and then product category (fresh, frozen, dressed, etc)

Recommendations

1. Add HS6 codes and additional SITC codes to allow users to drill down deeper into the trade data
2. Add guidance that explains how users can drill down deeper into the CRM data
3. Add a sector filter to the CRM section
4. Activate the 'Export to Excel' functionality
5. Add guidance about how to create bookmarks so users can come back to searches/markets that they use frequently
6. Set up ideation sessions with trade specialists to better understand what data they need access to in order to do their jobs better and see if this tool can deliver that