# Opportunity Management New Process (No EOI) Wireframe Testing

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# What we tested

We tested the latest OM Wireframe

https://taob1x.axshare.com/#id=8pdqr7&p=project\_opp\_support\_section\_overview&fn=0&dp=0

# Who we tested with

- We tested:
  - 6 potential customers
  - Using Video calls (Microsoft Teams)

# Results Summary

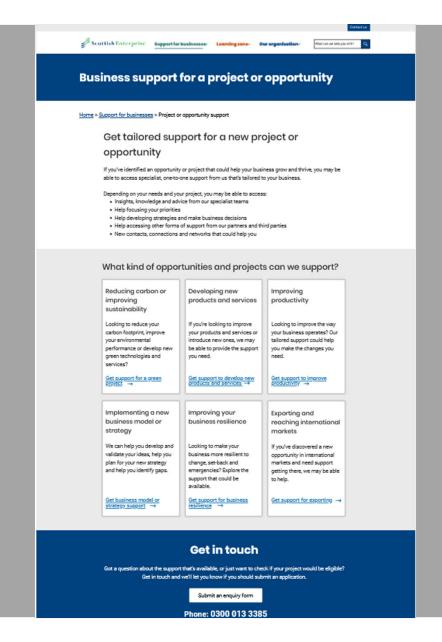
- There are two paths that are clear to customers. The text around the Enquire path suggests a conversation. When users click through they see a standard Contact Us form and little language to sustain their expectations
- The Apply path does meet expectations.
- The form is clean, clear and easy to understand
- The Account Creation is at the appropriate time in the journey and IS expected
- The Document requirements (Passport, Driving License, Other) were acceptable to all participants

# Recommendations

- Review the details page and consider adding language or depth to the contact us form to suggest it is more than what it appears to be.
- Review language on Service Descriptions to see if it can be "Socialised" a bit to sound less like "Business Speak".

## Tailored Support page

- Low Carbon and Net Zero, are often viewed as a Cost to businesses, and they do not hear enough about the benefits to them
- Otherwise the page works well



### Low Carbon

- Lack of visibility around benefits to the business
- Project types also suffer from the same "perspective disconnect"
- Some users found the language quite "Scary"

# Get tailored support for a project or opportunity in sustainability

Home > Support for businesses > Project or opportunity support > Reducing carbon or improving sustainability

## One to one support for a green or low carbon project

Sustainability isn't just about protecting the environment. Implementing sustainable practises and reducing your carbon usage makes good business sense too – it can save you money, attract potential new investors, and open up opportunities with oustomers and suppliers who are keen to work with environmentally conscious businesses.

If you've found an opportunity to make your business greener, we can work directly with you to develop a package of support. You'll have access to the expertise of our specialist teams, who can offer impartial advice, knowledge, access to tools and resources, and access to networks, connections and third-party support.

#### What type of support is available?

Our support is tailored to each business to help meet your specific needs and help you take advantage of a specific opportunity. However, for projects involving sustainability and low carbon, you could expect to receive some of the following:

- Access to our net zero diagnostic tool to get insights into how you can adapt your operations in response to the climate emergency.
- Workshops and one-to-one support to help you improve environmental performance while gaining a hurriness henefit
- · Help understanding the impact of your carbon emissions
- · Help developing a low carbon strategy
- · Support from a range of partners and stakeholders

#### What types of projects are eligible?

There are lots of different ways you may be looking to become more sustainable. Projects we typically support in this area include:

- Opportunities to reduce your carbon usage and improve energy efficiency
- Opportunities to make your business, processes or products more eco-friendly or sustainable
- Opportunities to develop products and services for the green economy
- Projects that contribute to the Scottish Governments ambition to achieve net zero carbon emissions by 2045.

This support isn't designed to help you find a new opportunity – you'll need to already have identified an opportunity and have a project in mind to help you achieve it. You'll need to have done some research to show what outcomes you expect and what challenges you'll likely face.

### Low Carbon (part 2)

- Some users thought they were expected to deliver all the outcomes
- People skim headings and lists. The paragraph needs to be condensed.

#### Outcomes your project will need to deliver

To be eligible for support, you should ideally be expecting some of the following outcomes from your project or opportunity:

- New jobs created (in Scotland)
- · Protection of existing jobs (in Scotland)
- · Improved wage, skill levels or workplace practises
- Reduced carbon emissions, improved environmental performance or contribution to Scotland's low carbon economy
- . Expansion into new sectors or trade with the rest of the UK for the first time
- · Growth in international sales
- . Increased turnover from new products, services or business models
- · Adoption of a co-operative or employee-owned business model
- · Improved productivity or reduced costs

#### What businesses are eligible?

We don't have any strict eligibility criteria around things like company size or sector. We're more interested in the opportunity you've found, how it could help your business and how it could benefit the wider economy. However, you will need to be trading in Scotland.

We're particularly interested in supporting businesses that:

- . Will create or safeguard jobs especially ones which are green, fair and lasting
- Are committed to or working towards fair work principles such as paying the real living wage, giving employees an effective voice and investing in workplace development. You can find out more at the Fair Work Convention
- · Are committed to low carbon and sustainable practises
- · Are new exporters or innovators

The more of these values you can meet, the more likely we'll be able to offer you support.

#### Businesses that aren't eligible

Our support services aren't available to companies who are involved in the following sectors or activities:

- · Banking, insurance or sub-prime lending
- Gambling
- · Adult entertainment
- Tobacco
- Locally traded services
- · Any activity that could have a negative impact on human rights

### Low Carbon (part 3)

- The steps were welcomed
- The Two buttons suggested Two paths only.
- The Enquire Button suggests a conversation. This expectation is not supported when they see what looks like a Contact us form on the next screen.

#### Businesses that aren't eligible

Our support services aren't available to companies who are involved in the following sectors or activities:

- · Banking, insurance or sub-prime lending
- · Gambling
- · Adult entertainment
- Tobacco
- Locally traded services
- · Any activity that could have a negative impact on human rights

#### The application process

During the application you'll be asked to create an account, which will let you save your application to return to later. You'll then need to provide:

- Personal details = such as your name, contact number and relationship to the business. You'll also need to provide some ID such as a scan of your passport or driving licence
- Business details such as your Companies House number or other registration number, as well as
  your address, tumover, number of employees and other basic information
- Project details such as the activities you're planning, the outcomes you expect and risks you've identified

Step 1 –	Step 2 – we'll review	Step 3 – activity plan	Step 4 – project
apply or enquire	your application		support
You can get in touch to discuss your idea with a specialist first, or you can jump straight to the application.	We'll let you know within X days if we can help. We may get in touch to discuss your idea further before giving a firm offer.	If your application is successful, we'll draft an activity plan that details what support we can offer you.	We'll deliver the support set out in the activity plan in collaboration with your business. This support will end when the project is complete.

#### Next steps

#### Get in touch

Before you apply, you can get in touch to discuss your idea with a member of the tearn, who can answer any questions you have and let you know whether you might be suitable for specialist support.

> Enquire about support

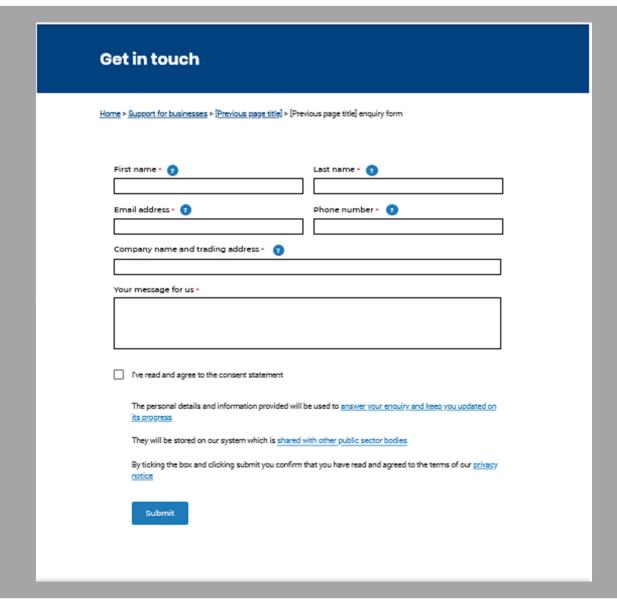
#### Ready to apply?

If you're confident that your idea and the activities you're planning are eligible for specialist support, you can start the application straight away.

Apply now

## Enquire

 This looks like a standard Contact Us form that does not reassure people that a conversation is being started.



## **Apply**

- This supports what people expect from the journey.
- The Sign In messages are a little confusing anc could be suppressed on first view.
- The main CTA on the page is not 100% obvious but everyone got there eventually



Sign in

### Tell us about your project or opportunity

Complete this form if you're interested in receiving specialist business support from Scottish Enterprise. If we think your project or opportunity might be suitable, one of our specialists will be in touch to speak to you in more detail about your project. This will help us make a full assessment.

Once you've submitted the form, we'll review it, and get back to you within 5 business days.

Already started an application? Sign in to continue your application

If you need help, contact us on 0300 013 3385.

Your project or opportunity

Your business details

Your contact details

Review and submit

Save and exit

# Your Project (part 1)

- No issues
- Form is clear and clean
- Easy to use

< Go b	pack.
	ibe the project or opportunity you're hoping we can help vith (max 400 words)
400 W	vords
Tell us	are the timescales of your project?    MM////   to
100 W	ords
What	risks have you identified associated with this project? about anything that might prevent you from achieving th
	you've set out for your business. (max 100 words)

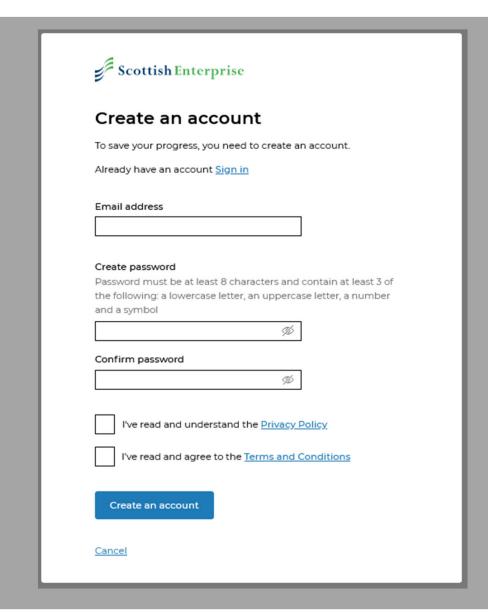
# Your Project (part 2)

- No issues
- Form is clear and clean
- Easy to use

100 w	ords	
	his project or opportunity deliver any of the following omes for your business?	
You c	an select more than one.	
	New jobs created (in Scotland)	
	Protect existing jobs (in Scotland)	
	Improve wage, skill levels or workplace practises	
	Reduce carbon emissions, improve environmental performance or contribute to Scotland's low carbon economy	
_	Expand into new sectors or trade with the rest of the UK for the first time	
	Grow international sales	
_	Increase turnover from new products, services or business models	
	Adopt a co-operative or employee-owned business model	
	Improve productivity or reduce costs	
	None of the above	

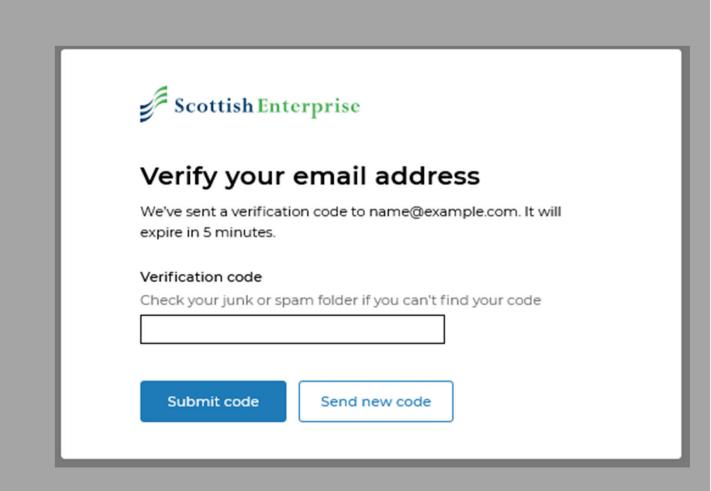
### Create an account

 All participants expected an Account to be created at this point in the journey



# Verify Email

- As expected.
- Follows expected website patterns



### **Phone Number**

- As expected.
- Follows expected website patterns



### Add a phone number for security

Set up multi-factor authentication by providing a phone number. We'll send you a code or an automated phone call to verify your number.

#### Country code

Select a country/region

#### Phone number

We'll use this number when you sign in to double check it's you. We won't use it for any other purposes.

How would you like to verify your number?

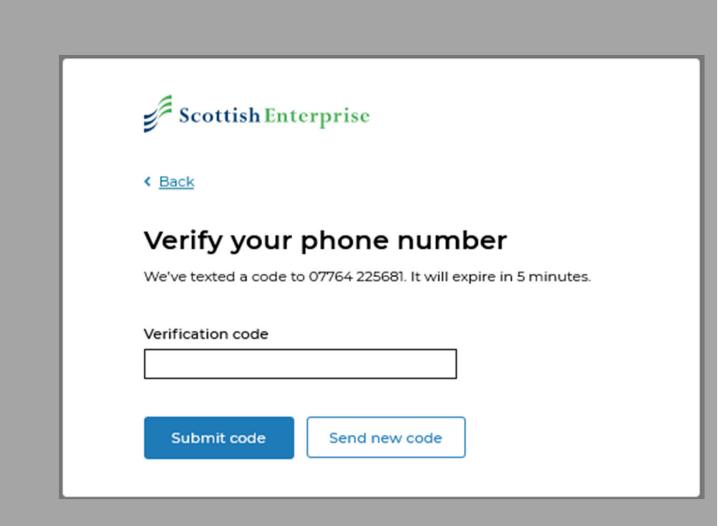
Text me a code

or

Call me

# Verify Phone

- As expected.
- Follows expected website patterns



### Confirmation Message

- As expected.
- Follows expected website patterns
- Other testing has shown that these Interstitial pages smooth the flow between sections quite well.



### Your account setup is complete

Thanks, we've successfully verified your email address and phone number. You can now continue to the rest of the application.

Continue to application

### Your Business Detail

 Users noticed the "Completed" label and moved onto "Your Business Details"



Sign out

### Tell us about your project or opportunity

Complete this form if you're interested in receiving specialist business support from Scottish Enterprise. If we think your project or opportunity might be suitable, one of our specialists will be in touch to speak to you in more detail about your project. This will help us make a full assessment.

Once you've submitted the form, we'll review it, and get back to you within 5 business days.

If you need help, contact us on 0300 013 3385.

Your project or opportunity

Your business details

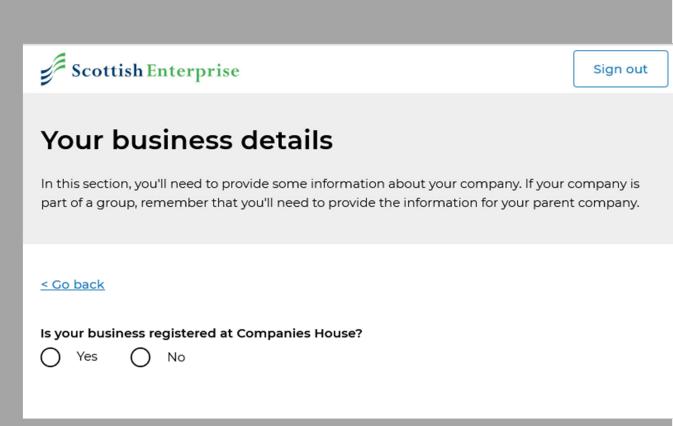
Your contact details

Review and submit Save and exit

### Your Business Detail

- Nice easy question
- Everyone selected Yes and progressed without issues\*

\*Not testing validation or data lookup at this stage of wireframe



### Your Business Detail

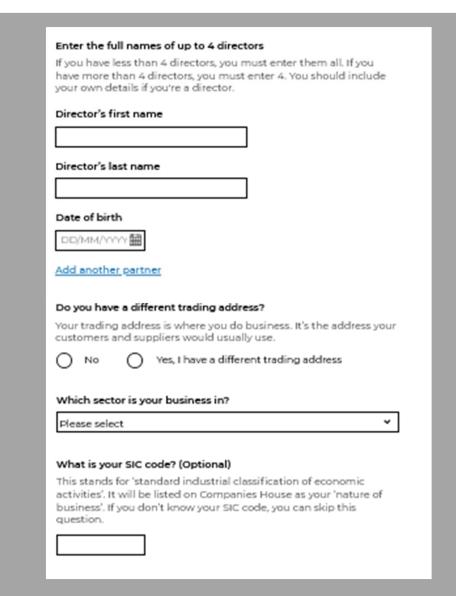
 Everyone selected Yes and progressed without issues\*

\*Not testing validation or data lookup at this stage of wireframe

# Your business details In this section, you'll need to provide some information about your company. If your company is part of a group, remember that you'll need to provide the information for your parent company. < Go back Is your business registered at Companies House? Business name and registered address This is the official address your business is registered to at Companies House. It may not be where you actually do business. Start typing your business' name, registered address or postcode What is your Companies House registration number? This should be 8 numbers or 2 letters followed by 6 numbers. You'll find it on the Companies House website or on letters you've received from Companies House. What type of organisation is your business? Please select Incorporation date DD/MM/YYYY

### Your Business Detail (2)

- Made sense to everyone
- Minor disconnect in language between "Director" and "Add Partner"
- Nobody had their SIC code on hand or memorised



### Your Business Detail (3)

- Some vagueness around Fair Work. Most are aware of Living Wage and related accreditation
- Carbon Emissions seem to be focused on our needs and not pitched in a manner that makes sense to businesses.

What is your main business activity?  Tell us a bit about what your business does – for example, what products or services you provide. (max 100 words)
100 words
How many full time equivalent (FTE) employees do you have in Scotland?
Only include current, permanent employees. Full time is over 30 hours a week. Two employees working 15 hours a week would make one FTE employee. Zero hour contracts don't count towards FTE employees.
Is your business committed to or aspiring to fair work practises?
This includes paying the real living wage, avoiding inappropriate use of zero hours contracts, investing in skills and training, taking action to tackle the gender pay gap, and promoting genuine workforce engagement, such as trade union recognition.  Yes No
Is your business committed to or aspiring to measure and reduce operational carbon emissions?
The Scottish Government has committed to Scotland being a net zero society by 2045 and businesses have a significant part to play in helping the country achieve this target.
○ Yes ○ No

# Your Business Detail (3)

All makes sense



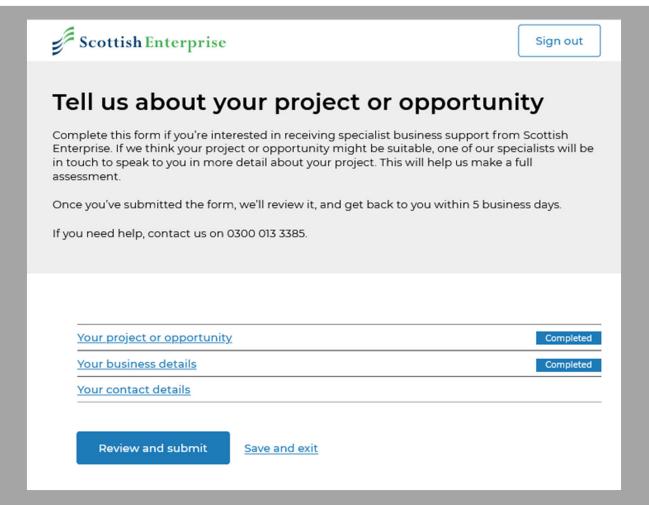
## Your Business Detail (4)

- All questions made sense
- The form was clean and clear enough that the long length did not negatively impact anyone

Is your company part of a group?
○ Yes ○ No
Has your business ever been subject to a Decree or County Court Judgement?
Yes No
Does your business currently have any missed payments that you still owe HMRC?
These doesn't include agreed deferred payments due to COVID-19.
Yes No
Is your business subject to any legal proceedings in course, pending or threatened?
Yes No
Have any of the directors of your business ever been disqualified from holding directorships?  Yes No
Are any of the directors of your business a Sanctions Restricted Person?
This is any person or entity that is (a) listed on the Sanctions List, (b) located in or incorporated under the laws of any Sanctioned Country, or (c) otherwise a target of Sanctions. For more information, see the <a href="UK government list of current sanctions">UK government list of current sanctions</a> .
Yes No
Confirm

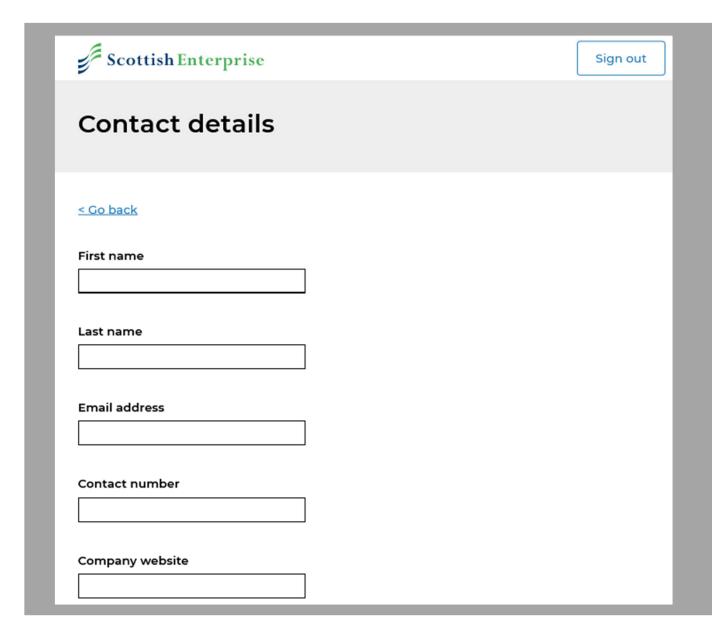
### **Contact Details**

- Noticed "Completed" label



# Contact Details (1)

- Nice and simple
- Did not surprise anyone



# Contact Details (2)

- In this round, nobody had any problems with the ID documents
- Everyone approved of IDV at this point

You	r position in the business
If m	ore than one option applies, select the most relevant.
$\circ$	Owner or sole trader
0	Director
0	Partner
0	Company secretary
0	Trustee
0	Other authorised representative
	ch of the following identification documents can you vide?
•	will help us confirm your identity. To see how we'll store and
	ect this personal data, you can read our privacy notice.
$\circ$	A scanned image of my passport
0	A scanned image of my driving licence
0	Neither of the above
	I certify that the personal details I've given are accurate to the best of my knowledge. I also confirm that either:
	<ul> <li>I am a Director, Authorised Signatory, Company Secretary, Trustee or other appointed officer of the organisation that I'm creating an account on behalf of</li> </ul>
	I am a sole trader or am authorised by the sole trader

### **Review And Submit**

 CTA (Review and Submit) was very clear to everyone



Sign out

### Tell us about your project or opportunity

Complete this form if you're interested in receiving specialist business support from Scottish Enterprise. If we think your project or opportunity might be suitable, one of our specialists will be in touch to speak to you in more detail about your project. This will help us make a full assessment.

Once you've submitted the form, we'll review it, and get back to you within 5 business days.

If you need help, contact us on 0300 013 3385.

Your project or opportunity
Your business details
Your contact details
Completed

Review and submit

Save and exit

## Application Review (1)

- Clear and easy to use (After Lorem Ipsum explained)
- The "Edit your answers" link was welcomed



Sign out

#### **Application review**

Your application has not been submitted yet. If you need to change an answer, just click 'edit'. Before you submit, you can download a copy of your completed application.

< Go back

#### Your project or opportunity

Edit your answers

#### Describe the project or opportunity you're hoping we can help you with

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat.

Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

#### Tell us about the challenges you're facing

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat.

#### Will this project or opportunity deliver any of the following outcomes for your business?

New jobs created (in Scotland) Grow international sales

#### How many new jobs will you create?

5 to 10

What new sales do you expect to achieve from expanding into international markets?

£150,000 to £249,999

### Application Review (1)

- Clear and easy to use (After Lorem Ipsum explained)
- The "Edit your answers" link was welcomed
- Easy to scan this document

#### About your business

Edit your answers

What is your business' trading name?

Example Company Ltd.

If you have one, what is your Companies House number?

AB123456

What is your primary trading address?

247 Fake Street Kinning Park Glasgow G2 7EF

What is your main business activity?

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat.

How much does your business use Scottish suppliers?

Most of our supplies come from Scottish suppliers

How much do you spend annually on Scottish suppliers?

£150,000 to £249,999

What was your annual turnover at your most recent year end?

£500,000 - £999,999

Of this turnover, how much came from international sales?

£85,000 - £249,999

What was your annual turnover at your previous year end?

£250,000 - £499,999

Of this turnover, how much came from international sales?

£85,000 - £249,999

How many full time equivalent (FTE) employees do you have in Scotland?

112

Is your business committed to or aspiring to fair work practises?

Yes

Is your business committed to or aspiring to measure and reduce operational carbon emissions?

Yes

### Contact Details (3)

- Clear and easy to use
- The "Edit your answers" link was welcomed
- CTA was very clear

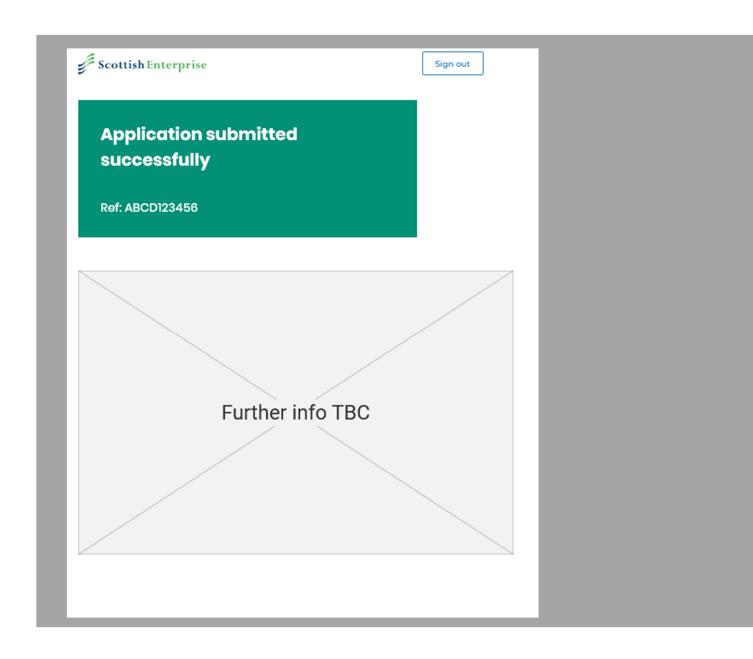
#### **Contact details** Edit your answers Contact name Jane Doe Job title Chief executive jane.doe@example.co.uk Contact number 077777777777 Company website www.example.co.uk Consent to use of information provided in this application By submitting this expression of interest form, the applicant acknowledges that the information provided in this may comprise company information and personal data (as defined in the UK GDPR (which imports into UK law, the terms of the General Data Protection Regulation (EU) 2016/679 as a consequence of the UK leaving the European Union) and the Data Protection Act 2018 ("Data Protection Any personal data provided in the application will be processed by Scottish Enterprise, for the purpose of progressing the expression of interest and in connection with any future funding and/or support, which includes carrying out appropriate checks and audits, administration and management purposes. All processing will be carried out in accordance with Data Protection Laws, and held in accordance with Scottish Enterprise's privacy notice. Individuals can find information on their rights in respect of the personal data we process by visiting our privacy notice. To achieve the aim of getting the best support to those we work with, the information provided in this expression of interest form may be shared with and used by our partner organisations. These include Business Gateway, Scottish Government, Highlands and Islands Enterprise, Skills Development Scotland and South of Scotland Enterprise. Find out more about our partner organisations. Personal data may also be shared with our suppliers, where they are engaged to undertake activities on our By submitting this expression of interest form, the applicant confirms that it is the controller of personal data it provides within this expression of interest and that this personal data can be processed by Scottish Enterprise for the purposes outlined above. The applicant, if successful, will also be the data controller for the personal data provided as evidence.

Download application summary

I've read and agree to the consent statement

# Success Message

- Nice clear message
- Ref. number was most appreciated



# Recommendations

- Review the details page and consider adding language or depth to the contact us form to suggest it is more than what it appears to be.
- Review language on Service Descriptions to see if it can be "Socialised" a bit to sound less like "Business Speak".

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