Opportunity Management Service Description & Enquiry Wireframe Testing

Apri 22nd 2021

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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

Who we tested with

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

Covid has disrupted your business over the last year, and you are looking for new income streams.

You are not sure how to do that.

You want us to help you with that

What we focused on

- Customer Understanding of language
- Happy path customer flow

Results Summary

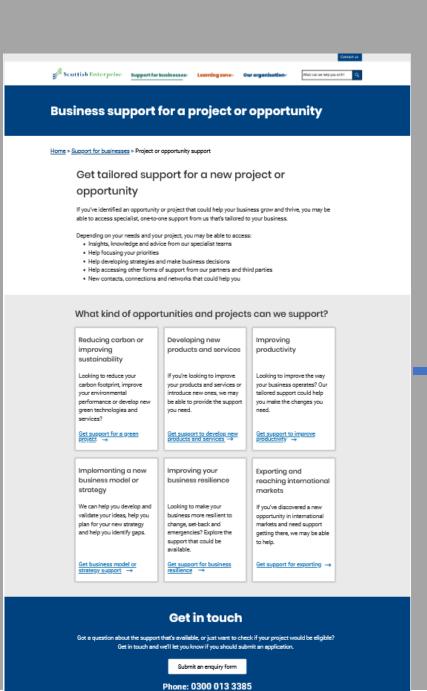
- The service descriptions have specific issues and this also varies with customer Industry
- There was more reticence than last time, over using Personal Documents requirements (Passport, Driving License, Other)

Recommendations

- Review Language around Low Carbon
- 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

 Page had added content but it was not needed in this scenario there were 5 services that appealed to people. (Everything but Low Carbon)



Specialist support to develop your business

Home - Support for businesses - Project or apportunity support

Get tailored support for new ideas, challenges and opportunities

If you're planning new activities to develop your business, tackle a challenge or take advantage of a new approximity, you may be able to access a peakage of fail and agectalist support. This support is based second glying you access to the expertise and knowledge of a range of specialist teams who can help you bring your ideas to life.

Depending on your needs and your planned activities, you may be able to access:

- Iraights, knowledge and guidence from our special at teams
- Help focusing your priorities
- Help developing strategies and make business decisions
- Help accessing other forms of support from our partners and third parties
 New contacts connections and networks that could help you

To qualify for suggest, you'll need to be able to show that the activities you've glanning will have goattive outcomes on the economy or environment — such as creating new jobs, protecting jobs, increasing superts, increating, reducing emissions or developing jow conferent technology.

What kind of activities and ideas can we support?

Reducing carbon or improving sustainability	Developing new products and services	improving productivity
Looking to reduce your cerbon footgrint, Improve your environmental performence or develop new low cerbon technologies and services?	If you're looking to improve your graducts and services or introduce new ones, we may be able to grow'de the support you need.	Looking to Improve the way your business operates? Our tailored support could help you make the changes you need.
Get support for a preen royled	Get auroport to develop new products and services.	Get support to Improve Resolutivity re
Implementing a new business model or strategy	Improving your business resilience	Explore new markets
We can help make strategic changes to your leadership, culture, operations, business model and more.	Looking to make your business more resilient to change, set-back and emergencies? Explore the support that could be evallable.	If you've discovered an apportunity to expend into new domestic or international markets, we may be able to help.
Gat aurocort to devalor your strategy →	Set auroport for business resilience	Get aurocort to explore new markets →

Got something different in mind?

If the activities you've glanning don't fall into the lated types, we may still be able to help. We're open to suggesting a wide range of activities, as long as you can show that yours will create jobs or have a ceptible impact on the wider aconomy and societies and that your business meets our values.

Find out if your business and planned activities could qualify for specialist support

Our specialist areas

Our agesticitat teams offer a wide range of expertise that could be made available to your business, depending on the apportunity you're working towards and the activities you're glanning. This includes:

- Innovetion suggert
- Sustainability support
 Digital support and transformation
- Protecting and using intellectual property
- Business stretegy and models
 Workplace and culture development
- Succession planning and organization structures
- Succession planning and organisation struct
 Support for manufacturing
- Implementing better methods and proce
- Marketing, market research and sales
- Growing and scaling your business
 Understanding and accessing funding option
- Business collaborate

Suplars the different types of activities we can support to find out more about how these specialist areas could be involved.

Get in touch

Got a question about the support that's available, or just worst to check if your project would be eligible?

Cat let we had be no reportable forces.

Contact

Service Description Page

- 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 sustainabilit

One to one support for a green or low carbon

reducing your carbon usage makes good business sense too = it can save you money, attract potential new investors, and open up opportunities with customers 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

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
- . 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.

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.

Specialist support to develop a new strategy or business model

Home * Support for businesses * Esplect or proportantly auropat * Implementing a new business model or strate;

Tailored support from our specialist teams

As get of our appoints support service, you'll have occess to the wealth of knowledge and expertise of our vertices appoints teams. They can offer knowledge and guidence, hely you develop your ideas, grounds research, analysis and reports, and hely you liferably areas of improvement or risks their you may not have considered.

How we can help you develop your strategy

What could this support look like?

Types of activities we can support

Other support available to you

- . Understand how feir work could benefit your business and your employees at the <u>Fair Work Supress Tool</u> to understand where you could improve

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 tumover 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 team, 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.

Get in touch

Home > Support for businesses > [Previous page title] > [Previous page title] enquiry form

First name - 👩	Last name - 😨
Email address • 🕡	Phone number • 1
Company name and trading address - 7	
Your message for us -	
Tve read and agree to the consent statement	
The personal details and information provided will b	e used to answer your enquiry and keep you updated on
They will be stored on our system which is shared w	rith other public sector bodies
By ticking the box and clicking submit you confirm to notice	hat you have read and agreed to the terms of our <u>privacy</u>
Submit	

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 back Describe the project or opportunity you're hoping we can help you with (max 400 words) 400 words What are the timescales of your project? DD/MM/YYYY DD/MM/YYYY Tell us about the challenges you're facing You could talk about any barriers or knowledge gaps, why you need help and how you think we could help. (max 100 words) 100 words. What risks have you identified associated with this project? Tell us about anything that might prevent you from achieving the goals you've set out for your business. (max 100 words) 100 words

Your project or opportunity

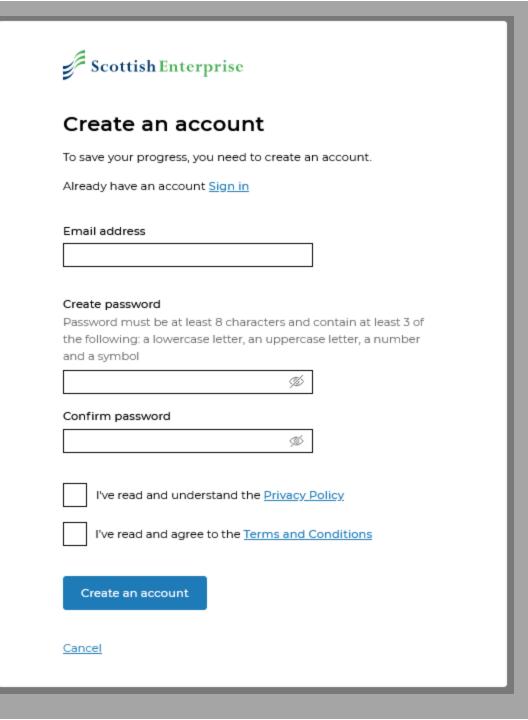
Your Project (part 2)

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

proje	ect forward. [max 100 words]
100	words
	this project or opportunity deliver any of the following comes for your business?
You	can 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



Verify your email address

We've sent a verification code to name@example.com. It will expire in 5 minutes.

Verification code

Check your junk or spam folder if you can't find your code

Submit code

Send new code

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.

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?

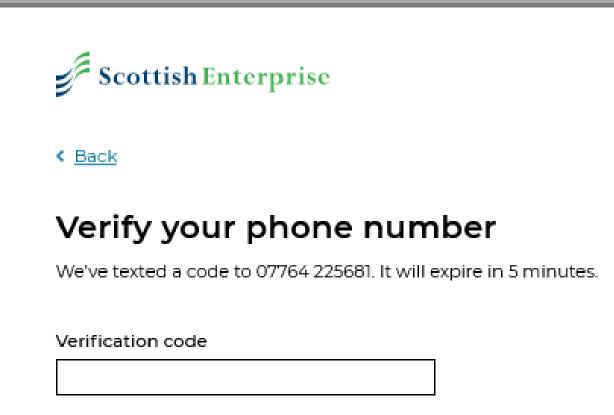
Text me a code

or

Call me

Verify Phone

- As expected.
- Follows expected website patterns



Send new code

Submit code

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

Completed

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



Sign out

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?

0

Yes

0

Nο

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? (1) Yes (2) No
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

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

Enter the full names of up to 4 directors
If you have less than 4 directors, you must enter them all. If you
have more than 4 directors, you must enter 4. You should include your own details if you're a director.
Director's first name
Director's last name
Date of birth
DD/MM/YYYY
Add another partner
Do you have a different trading address?
Your trading address is where you do business. It's the address your customers and suppliers would usually use.
No Yes, I have a different trading address
Which sector is your business in?
Please select.
What is your SIC code? (Optional)
This stands for 'standard industrial classification of economic activities'. It will be listed on Companies House as your 'nature of business'. If you don't know your SIC code, you can skip this question.

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.
O Yes O 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.
n helping the country achieve this target.
U Yes U №

Your Business Detail (3)

All makes sense

How much does your business use Scottish suppliers?
All of our supplies come from Scottish suppliers
Most of our supplies come from Scottish suppliers
Same of our supplies came from Scattish suppliers
Nane of our supplies come from Scottish suppliers
What was your annual turnover at your most recent year end?
Less than £25,000
O 583,000 - 5249,999
© #250,000 - #499,999
○ €200'000 - €389'888
○ £lm-£199m
○ £2m-£4.89m
○ £5m-£2.99m
O #10m-#1439m
O #15m - #24.99m
C £25m or more
Office to the second se
Of this tumover, how much came from international sales?
Less than #25,000
© #85,000- #249,999
© #250,000 - #499,999
O #500,000 - #989,989
O flm-fl99m
○ £2m-£4.99m
○ £5m-£9,99m
O £10m-£14.99m
O #15m - #24.99m
○ £25m or more
What was your annual turnover at your previous year end?
Less than #25,000
O #85,000 - #249,999
O #250,000 - £499,999
_ s500,000 - s989,989
○ flm-f199m
○ £2m-£499m
○ £3m-£9,99m
○ £10m-£1439m
O #10m - #24.99m
○ £25m or more
Of this tumover, how much came from international sales? Less than £25,000
O £83,000 - £249,999
O #250,000 - £499,999
O #200,000 - #389,999
O #2m-#199m
O 52m-5499m
_
O #5m-#839m
O #10m-#14.89m
O #15m - #24.99m
○ £75m or more

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?
O Yes O 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 UK government list of current sanctions .
O Yes O No
Confirm

Contact Details

- Noticed "Completed" label



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

Scottish Enterprise

Sign out

Contact Details (1)

- Nice and simple
- Did not surprise anyone

< Go back	
First name	
Last name	
Email address	
Contact number	
Company website	

Contact Details (2)

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

Your position in the business	
If more than one option applies, select the most relevant.	
Owner or sole trader	
O Director	
O Partner	
Company secretary	
O Trustee	
Other authorised representative	
Which of the following identification documents can you provide?	
This will help us confirm your identity. To see how we'll store and protect this personal data, you can read our privacy notice.	
A scanned image of my passport	
A scanned image of my driving licence	
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:	
 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 	
 I am a sole trader or am authorised by the sole trader to create an account on their behalf 	
Confirm	

Review And Submit

 CTA (Review and Submit) was very clear to everyone

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

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?

les.

Contact Details (3)

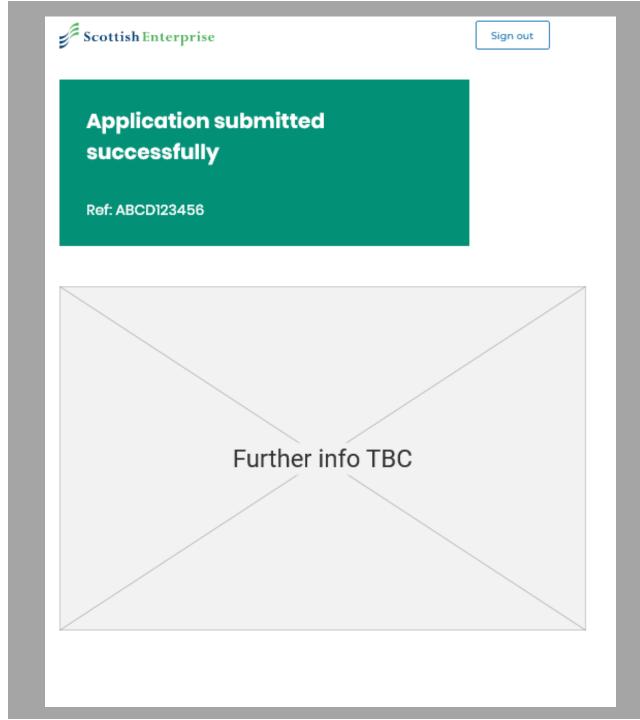
- Clear and easy to use
- The "Edit your answers" link was welcomed
- CTA was very clear

Contact details	Edit your answers
Contact name Jane Doe	
Job title Chief executive	
Email jane.doe@example.co.uk	
Contact number	
Company website www.example.co.uk	
Consent to use of information provided in this app	olication
By submitting this expression of interest form, the applicant acknowledges that the infor provided in this may comprise company information and personal data (as defined in the (which imports into UK law, the terms of the General Data Protection Regulation (EU) 201 consequence of the UK leaving the European Union) and the Data Protection Act 2018 ("I Law").	e UK GDPR 16/679 as a
Any personal data provided in the application will be processed by Scottish Enterprise, for of progressing the expression of interest and in connection with any future funding and/which includes carrying out appropriate checks and audits, administration and managem All processing will be carried out in accordance with Data Protection Laws, and held in a Scottish Enterprise's privacy notice. Individuals can find information on their rights in respensional data we process by visiting our privacy notice.	or support, nent purposes. ccordance with
To achieve the aim of getting the best support to those we work with, the information pro expression of interest form may be shared with and used by our partner organisations. T Business Gateway, Scottish Government, Highlands and Islands Enterprise, Skills Develoy Scotland and South of Scotland Enterprise. Find out more about our partner organisation data may also be shared with our suppliers, where they are engaged to undertake activiti behalf.	hese include pment is. Personal
By submitting this expression of interest form, the applicant confirms that it is the control data it provides within this expression of interest and that this personal data can be proc Scottish Enterprise for the purposes outlined above. The applicant, if successful, will also controller for the personal data provided as evidence.	essed by
l've read and agree to the consent statement	
Submit	

Download application summary

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".

fin