

# Activity Plan: company user research

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# What we tested

- The Word document version of the Activity Plan that was used for the OM pilot project

# Who we tested with

- 7 people from 5 companies that were part of the pilot

# What we wanted to learn

- What was their experience of using the activity plan?
- What worked well?
- What didn't work so well?
- Was there anything missing that they expected to be there?
- What format would they want to receive the plan in?
- How were they being informed/would they want to be informed about updates to the activity plan?

# Results summary

- Companies aren't that interested in the activity plan
  - "I don't care what's on a piece of paper."
  - "The activity plan didn't really register."
  - "The document itself – I never really opened it."
- The real value for companies is in the conversations they have with us
- It all comes down to the people
  - "It's all about the calibre of the person you're speaking to."

# What was your experience of using the activity plan?

- The activity plan is seen as a document for us, not them
- They value the support that we provide, but the activity plan document itself isn't that important to them

# What worked well?

- Very flexible
- OM brought together the experts and prevented the company from having to join the dots themselves
  - "The value was in bringing together the experts all at once."
- Helped them think about their business in a different way

# What didn't work so well?

- Some disappointment in the research service
- Expertise is great, but we need more help and less talking (also funding)
- Businesses still feel you need to be able to 'speak Scottish Enterprise' to get the most out of the process

Was there anything missing that they expected to be there?

- No – they didn't pay much attention to the form itself

# What format would they want to receive the plan in?

- No one expressed a strong preference for the format of the plan
- Keep it short and simple

# How did SE share the activity plan and any updates?

- Email with follow-on discussions
- Miro was used in some cases to facilitate discussions

# Quotes

- "It has made us think about things in a different way."
- "It was as if we were interacting with a group of colleagues as a team."
- "Your first point of contact has to be really good – if they aren't then opportunities are missed."
- "You have lots of experts but WE need to do the work. This can create more work than it solves."
- "If you were not used to SE form filling then it might be tricky. We know the right buzzwords."

# User needs

Do we need to update the company user needs around the activity plan?

- **Review the activity plan** - As a customer I want to review the activity plan from SE so that I know what they've recommended I take action on and what SE/partners will do to support the project
- **Agree to activity plan** - As a customer I want to provide my agreement to the plan and estimated measures so that the project can go ahead
- **Take action on activity plan** - As a customer I want to take action on the activities within the plan that SE provided so that I can realise the outcomes we discussed
- **Support SE and partners to deliver the plan** - As a customer I want to support SE or SE agency/partners resources with delivery of activities from the plan if required so that the project is successful
- **Provide updates on my progress** - As a customer I want to provide the Opportunity Lead with updates of my progress against the activities I am responsible for in the plan so that the plan is kept up to date
- **Agree to updates to the plan** - As a customer I want to review and agree to any updates SE have made to the activity plan so I know what has changed and what I need to do to realise the updated outcomes
- **Review the completed activity plan** - As a customer I want to review the completed activity plan and estimated outcome measures that SE have shared with me so I can provide any input and agree when it has been delivered

# How might we...

- Get businesses to sign off on activity plans when they aren't that interested in the paperwork?
- Make it as easy as possible for businesses who are new to SE to interact with us under Opportunity Management?

**Fin**