

Expression of Interest

Initial testing of EOI form

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Martin Kerr

Anubhav Mittal

Summary

- We put the form on UserZoom for online unmoderated testing with their panel
- We added a screener for Scottish Business Owners or Decision Makers
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Hypotheses

To structure testing, we applied 2 Hypotheses to the research:

Hypothesis 1

- People will welcome the Expression of Interest approach

Hypothesis 2

- The form will make sense and be easy to use

The test notes allow retrospective application of new Hypotheses up to a point

Hypothesis 1: Partially supported

Hypothesis: People will welcome the Expression of Interest approach

Findings:

- People understand the benefits of the approach
- They think it will save them time in the long run
- Expect to not have to resubmit the same information again

BUT

- Would rather have a quick online solution that gives an immediate answer
- Have a solution that can be left and returned to with their data still saved

Recommendations:

- Clarify language around EOI vs Pre-qualification, and the exact purpose of this form

Hypothesis 2: XXX

Hypothesis: The form will make sense and be easy to use

Findings:

- 000

Recommendations:

- 000

The form

Has 5 main sections

- Purpose
- Company Information
- Project Info
- Outcomes
- Consent

EXPRESSION OF INTEREST FORM			
Purpose Scottish Enterprise (SE) works with companies to achieve sustainable growth, both in terms of quality jobs and turnover, delivering economic benefit and prosperity for Scotland. We work with Scottish companies to identify and implement opportunities across key areas – international growth, supporting new product and process innovation, reducing carbon emissions and strengthening business resilience. We offer specialist, impartial advice to help make strategic business decisions, build capability and resilience, and help to navigate and broker support from a wider group of partners. Our support is tailored to needs and aligned to delivering the following outcomes - <ul style="list-style-type: none">• More businesses in Scotland with employees who are paid the real living wage• More environmentally responsible businesses who prosper by using less resources• Productivity gains to help drive more, better quality jobs that pay higher salaries, improve security of hours and more predictable work patterns• More equitable distribution of growth income and wealth across Scotland Scottish Enterprise do not work with the following restricted sectors which include crime lending, gambling, adult entertainment, activities with adverse impact on human rights, tobacco and locally traded services. To allow us to better understand how we might support your business please complete the following on receipt we will review and contact you within 3 days.			
Company Information			
Company Trading Name			
Primary Trading address (Only required where this is different to the Registered office address at Companies House)			
Companies House registration number (Registration number as at Companies House. This also applies to Community Interest Companies, for Charities please provide Scottish Charity Registered number)			
What is your main business activity?			
Contact Name			
Job title			
E-mail			
Telephone			
Website			
Please describe the specific project you wish to address?			
What help do you need (Please describe challenges or barriers to achieving your project. Why do you need help? - What value might SE add?)			
Will this project or opportunity deliver any of the following outcomes for your business? (Please tick all that apply)			
New jobs created in Scotland	<input type="checkbox"/>	Select from dropdown	
Jobs safeguarded in Scotland	<input type="checkbox"/>	Select from dropdown	
Improve wage, skill levels or workplace practices	<input type="checkbox"/>		
Reduce carbon emissions or improve environmental performance	<input type="checkbox"/>	Select from dropdown	
Your company will expand into new sectors and/or trade with the rest of the UK for the first time	<input type="checkbox"/>	Select from dropdown	
Your company will grow international sales	<input type="checkbox"/>	Select from dropdown	
Increase turnover from New Products, Services or business models	<input type="checkbox"/>	Select from dropdown	
Adoption of a co-operative or employee owned business model	<input type="checkbox"/>		
Improve Productivity/reduce costs	<input type="checkbox"/>	Select from dropdown	
Which of the following statements best applies to your purchase of goods and services from Scottish based suppliers?			
What was your company's annual turnover (£) at your most recent year end	Select from dropdown	What was your turnover (£) from international sales	Select from dropdown
What was your company's annual turnover (£) at previous year end	Select from dropdown	What was your turnover (£) from international sales	Select from dropdown
How many FTE (full time equivalent) jobs do you employ in Scotland			
Is your business committed to Fair Work practices (Fair work practices is a mutual trust & collaborative employee voice, opportunity to access and progress in work, security of hours and income, fulfilling roles aligned with workers' skills)			<input type="checkbox"/>
Consent & Right to Withdrawal/Revocation of Consent			
By signing this application, the applicant acknowledges that the information provided in this application may comprise company information and personal data as defined in the General Data Protection Regulation (EU) 2016/679 and the Data Protection Act 2018 ("Data Protection Law"). Any personal data provided in the application will be processed by SE in accordance with Data Protection Law and held in accordance with Scottish Enterprise's privacy notice, which can be found at https://www.scottish-enterprise.com/help/privacy-notice/your-rights . Individuals can find information on their rights in respect of the personal data we hold by also visiting our privacy notice. The information provided in this application may be shared and used by Scottish Enterprise, The Scottish Government, Highlands and Islands Enterprise and other associated bodies such as local delivery organisations, consultants and agents collectively referred to as 'the Agencies', to assess its suitability for support. If the application is successful, the Agencies will use the information provided in this application form for administration and management purposes, including carrying out appropriate checks and audits. Some information may also be passed to auditors, the European Commission or its agents for administrative purposes. By signing this application, the applicant confirms that it is the data controller of personal data contained in this application 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.			
Name of applicant (print)			
Position			
Signature		Date	Click or tap to enter a date

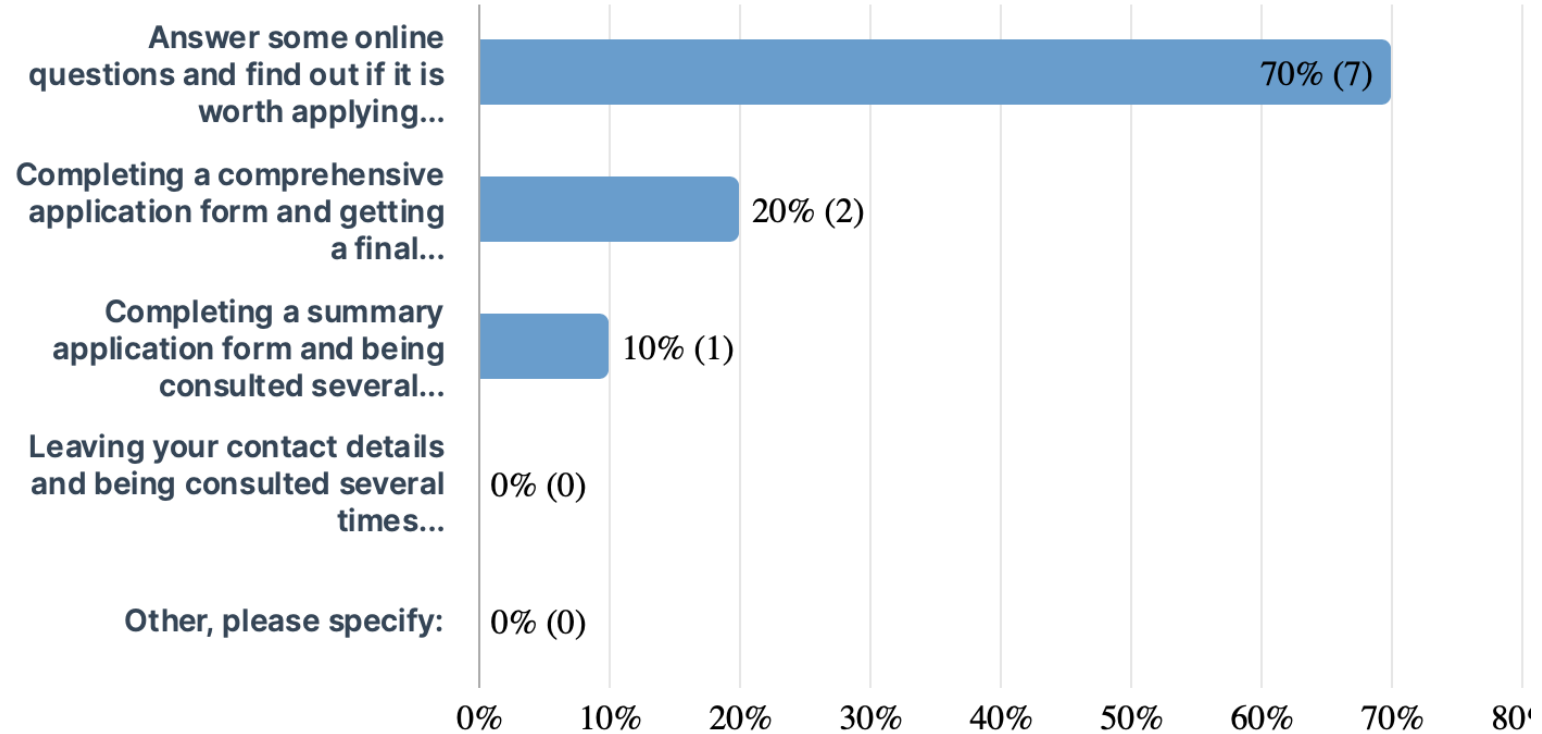
Pre-test questions

We asked the following question before showing the form:

1. When applying to the government for business support, which approach would you prefer?
2. What do you understand by Expression of Interest?
3. What are the Pros of Expression of Interest?
4. What are the Cons of Expression of Interest?

Pre-test (1)

When applying to the government for business support, which approach would you prefer?



Notes: This section raises the question of “Pre-qualification” vs “Expression of Interest”

Pre-test (2)

What do you understand by Expression of Interest?

- To register your interest in something, whether you take it up or not can be decided later.
- An expression of interest in my understanding is a person business or other has orated a desire to find out more about my business or willingness to consider furthering that relationship
- Confirming that you are keen to be involved and would undertake an exercise to evidence this if necessary such as an application or due diligence checks
- Expression of intrest is a gathering information tool to allow the perspective client decide if they are looking to go ahead with the service
- Give details about my business and a short paragraph on why I want to submit an application
- I believe that an Expression of Interest is essentially the first step in understanding or applying for a position. It is an opportunity for you to put forward anything you deem to be key about yourself in relation to the particular role and what your skills, strengths and aims are based on the requirements/asks listed within the job description.
- Registering interest in a service / product etc - potential
- I think it means a formal/legal way of letting an organisation know you are interested in a service. Like when you buy a house
- Giving an initial note to be interested in something before actually applying through a set procedure.
- Expression of interest is a template that expresses a company's interest in buying another company

Pre-test (2)

What do you understand by Expression of Interest?

These suggest:

- Showing that you are interested
- Collecting Data
- Formal/Legal
- First Step
- Collecting Evidence
- An initial decision to proceed (or not)

Pre-test (3)

What are the Pros of Expression of Interest?

- You should be notified of any change
- it gives options it provides feedback on prototypes
- Not having to go through the full application process and perhaps being shortlisted in some way. Not wasting a lot of time being considered only to be let down ultimately in some way
- information packs etc allow business owners make a clear decision based on factual information
- You don't need to submit a full application until you know that you qualify for it
- It is an opportunity to present yourself in the best light possible and to do it in a succinct and clear way. It does not have to take a lot of time to prepare and is usually fairly easy to tailor based on the different role descriptions. It is non-committal and does not take away from other potential opportunities - you are just registering your awareness of the role and your availability.
- not confirmed / flexibility / not tied in
- I think it means that you need to be engaged in the process and so those competing for the same service won't get an advantage as you need to be provided with the same information as them
- taken the initiative to show interest in something rather than knowingly applying with many others.
- you can see the initial reaction from the company you are trying to buy and the reaction from the general public

Pre-test (3)

What are the Pros of Expression of Interest?

These suggest

- More communication & feedback
- Shorter process before being shortlisted
- Less wasted time
- Clear decisions
- An opportunity
- Flexible
- Fair

Pre-test (4)

What are the Cons of Expression of Interest?

- You have not reached a decision there and then
- they can be self serving and costly
- It may not work out and any time spend even completing initial checks may be wasted.
- sometimes the information packs are one sided and arent telling the truth
- waiting time before you get to receive the money
- It is one way communication, there is no onus on the other party to respond which is not helpful if there are questions or you would like further information. Other cons would be that it is just a summary of you and your skills when you may feel there is much more you would like to discuss about what you can bring to the table and your skills - you have to be selective.
- a little general / not guaranteed / just in principle
- You may want to show interest in confidence and formally doing it might remove this.
- It can sometimes feel like a double procedure for an application
- it might expose your companies strategy and the expression of interest may lead to other parties blocking the move.

Pre-test (4)

What are the Cons of Expression of Interest?

These suggest

- Possible waste of time & money
- Possibly not that realistic
- A bit generic
- Quite one way (Communication)
- Possibly extra effort required (Doubling up)
- Intellectual Property / Business Strategy leakage

Initial response to EOI form

We asked the following question about the EOI form:

1. Now that you have had a look at the "Expression of Interest form (EOI form)", what does it mean to you?
2. What do you expect as a result of completing this EOI form?
3. If you were using this EOI form, how do you feel about this way of accessing our products and services?
4. Is this what you were expecting to see when we mentioned "Expression of Interest form" (EOI form)?

Initial Thoughts (1)

Now that you have had a look at the "Expression of Interest form (EOI form)", what does it mean to you?

- We as a company registering and expressing our interest in receiving help from Scottish Enterprise
- it means a specific application to get sponsored mentored for a particular objective/ goal
- Outlines criteria for qualification. A short overview as to whether you will qualify depending on the business type and outcomes delivered. Once completed you will receive a quick response as to whether your business is eligible based on the criteria achieved and this will probably prompt a further more detailed application process.
- the same as before however this one seems as though it tailors it to each and every client
- As I said before, I let the agency know that I am interested in applying for the service/grant
- It is a description of what services / finances are on offer in a very broad sense and allows you to respond in kind, in a summarised format, what you would expect or need from these services and what your current position is in relation to the aforementioned business areas; costs, FTE etc
- it seems to be the first part in the administrative process of getting support from SE
- It's a way of Scottish Enterprise assessing my business for suitability for support from them. The benefit to me is the help Scottish Enterprise can provide in supporting my involvement in the project I'm interested in. It makes clear that there are social and environmental elements as well as commercial ones that are important to Scottish Enterprise and the likelihood of them working with my company
- It means you can show an interest to apply for S.E. funding to support my business by filling out this form.
- it is a form that will give your company information to Scottish Enterprise and they will help your company to grow and reach new opportunities

Initial Thoughts (1)

Now that you have had a look at the "Expression of Interest form (EOI form)", what does it mean to you?

These suggest:

- Registering
- Specific
- Applying
- Lists services / grants
- Summarise my needs & commitments
- Registering
- Asking for Help

Initial Thoughts (2)

What do you expect as a result of completing this EOI form?

- We as a company registering and expressing our interest in receiving help To be contacted after three days for further discussions and whether we would receive assistance
- an acknowledgement email stating what to expect next. I would expect a time frame to receive an answer and potentially a point should i wish to update the information submitted
- A quick turnaround and decision as to whether you can proceed with the funding application and to enter a second stage of the process
- an information pack and tailored plan on how they can help
- Have a response of whether I am eligible for the grant/service. If it is the case I will be sent a full application form to outline my project, business case, risk assessment, etc.
- Further communication would surely come whether by letter, email or telephone to discuss the eligibility for the scheme or not and, if so, what in particular the business could benefit from most. Down the line I would expect either managerial assistance/advice or financial assistance from the scheme.
- Contact from SE and guidance
- For SCottish Enterprise to contact me within 3 days of receiving this application to discuss my company's suitability and, if suitable, what they can do to support me
- To be contacted by S.E. to allow me to apply for funding, or to be told that I cannot apply for funding, or perhaps to ask further questions to see if I can meet their demands by giving more detailed information.
- I would expect assistance in growth and with new products your company to grow and reach new opportunities

Initial Thoughts (2)

What do you expect as a result of completing this EOI form?

These suggest

- Contact within 3 days
- Comms
- Quick Decision
- How SE can help / Tailored plan of help
- How to proceed
- Help

Initial Thoughts (3)

If you were using this EOI form, how do you feel about this way of accessing our products and services?

- A very good way, short and simple
- I feel this is quite a standard way to access products
- Fine. It suggests qualifying criteria and this allows a business to decide whether to proceed with the EOI 'application' at this point. If you fail to meet the criteria at this early stage you can almost self declare that you will/wont qualify and proceed accordingly.
- fine, this is very clear information
- I don't mind it, it is a documented process which is helpful for both the agency and me
- I would feel very positive, there is nothing restrictive or 'scary' in the form in the sense that it is very clear that it is informative only i.e. information gathering so as to be as much help and to provide the best assistance possible. I would feel as though we are both laying our cards out on the table and that we are there to help each other.
- clear and fine - no issues - it would be an expected 1st part of the journey
- Form is clear. If my company doesn't fit the social/environmental criteria then there's little point in me spending time looking for their support. I like the form
- I would feel comfortable with it. It appears thorough and fair as well as informative.
- I would prefer that the questionnaire was an online survey and not a downloadable word document. It feels more professional if it is done all online.

Initial Thoughts (3)

If you were using this EOI form, how do you feel about this way of accessing our products and services?

These suggest

- Good, short, simple, standard
- Suggests a nice quick fair decision
- Positive, clear, sensible
- As expected
- Obvious if it is worth me continuing
- Thorough, fair, informative

BUT

- Would be better online

Initial Thoughts (4)

Is this what you were expecting to see when we mentioned "Expression of Interest form" (EOI form)?

50% said it was as expected
the rest said:

- The form could be in a better format than word (although I'm not sure if this is how it would be presented in reality) - there are so many other interactive formats available .pdf or online interactive forms that may be really useful for people slightly more tech savvy or who don't want to have things in paper format to complete.
- I thought EOI form would be simply a legal thing to benefit me rather than a way of Scottish Enterprise assessing my suitability. That could just be my ignorance of what EOI is rather than anything unusual about this form
- I think my definition of an EOI form was wrong..

Purpose Section

We asked the following question about the Purpose section:

1. Understanding the the "Purpose" was:
2. The "Purpose" paragraph was:
3. Is this what you were expecting to see when we mentioned "Expression of Interest form" (EOI form)?
4. Please suggest any changes that you would like to see in the "Purpose" paragraphs? (please put n/a if no comment)

Purpose section

Understanding this section:



Difficult — Easy



Purpose section

The purpose was:



Unclear — Clear

- 1
- 2
- 3
- 4
- 5
- 6
- 7

Purpose section

As Expected?:

Yes



No



Purpose section

Suggestions:

- I feel there is adequate information in this and I cannot think of any suggestions at this time
- Maybe add levels of funding/support available and what different aspects a business can apply for. Case studies would be useful as well. Not necessarily on the form but on the website so a business can see what types of thing are available and they can see how they might also benefit or draw suitable comparisons
- Other than the format I don't see anything much at all that could change. You could list the sectors that you do not work with by bullet point instead of within the sentence itself, which may be clearer
- I think the use of word document is not very professional and it should all be online.

Company Information

We asked the following question about this section:

1. Understanding the "Company information" section was:
2. The questions were:
3. Were the questions what you would expect from an EOI form?
4. Are there any questions that you would not be able to answer?

Company Information

Understanding this section was:



Company Information

The questions were:



Unclear — Clear



Company Information

As Expected?:

Yes



No



Company Information

Are there questions that could not be answered:

Yes



No



Project Information

We asked the following question about the Project Information section:

1. Understanding the questions were:
2. The questions asked were:
3. Were the questions what you would expect from an EOI form?
4. Are there any questions that you would not be able to answer?

Project Information

Understanding the questions were:



Project Information

The questions were:



Unclear — Clear

- 1
- 2
- 3
- 4
- 5
- 6
- 7

Project Information

As Expected?:

Yes



No



Don't Know



Project Information

Are there questions that could not be answered:

Yes



No



Don't know



Outcomes

We asked the following question about the Outcomes section:

1. Understanding the questions were:
2. The questions asked were:
3. Were the questions what you would expect from an EOI form?
4. Are there any questions that you would not be able to answer?

Outcomes

Understanding the questions were:



Difficult — Easy



Outcomes

The questions were:



Unclear — Clear



Outcomes

As Expected?:

Yes



No



Don't Know



Outcomes

Are there questions that could not be answered:

Yes



No



Don't know



Consent

We asked the following question about the Consent section:

1. Understanding the "Consent" paragraph was:
2. The "Consent " paragraph was:
3. Is this what you expect the "Consent" paragraph to look like in the "Expression of Interest form" (EOI form)?
4. Please suggest any changes that you would like to see in the "Consent" paragraphs? (please put n/a if no comment)

Consent

Understanding the "Consent" paragraph was:



Difficult — Easy



Consent

The "Consent " paragraph was:



Unclear — Clear



Consent

Is this what you expect the "Consent" paragraph to look like in the "Expression of Interest form" (EOI form)?

Yes



100% (10)

Outcomes

Please suggest any changes that you would like to see in the "Consent" paragraphs? (please put n/a if no comment)

- I think it should all be online and not in a word document. If it's online it will be much more user friendly.

Follow Up Questions

We asked these follow up questions:

1. What do you expect to happen as a result of completing this EOI form and submitting in?
2. Do you feel that the EOI form will get you the support required by you/your business?
3. At any point while filling in the form did you notice the lack of any of these?
4. Overall, how easy or difficult are the questions to understand?
5. If you were filling in this form for your company how would you find it?
6. Overall, the questions were:
7. Please list top 3 benefits of this EOI form approach. (use n/a if no comment)
8. Please list top 3 drawbacks of this EOI form approach. (use n/a if no comment)

Follow up (1)

What do you expect to happen as a result of completing this EOI form and submitting in?

- We would be contacted for further information
- I would expect a reply informing me that have received my application what time frame i could expect a reply in and who i can use as a point of contact for any further help i required
- A decision as to whether you qualify or a request for further clarification on some areas perhaps and then to initiate a full checking process with application that is more detailed or maybe interview process
- someone gets back in touch to discuss further
- receiving a reply within 3 working days
- To receive a response / confirmation of success (or not) in a respective period of time. Following this, further communication with SE regarding the most suitable assistance they can offer.
- journey started - I would be contacted by SE
- for Scottish Enterprise to contact me to discuss within 3 days
- receiving a reply from SE seeking more information, or to ask to apply for funding or perhaps hear we wouldn't be eligible to apply on this occasion.
- I would expect to be contacted by Scottish Enterprise within a few days

Follow up (1)

What do you expect to happen as a result of completing this EOI form and submitting in?

These suggests:

- Reply (3 working days)
- Contact
- Decision
- Success or Not
- Supply more information

Follow up (2)

Do you feel that the EOI form will get you the support required by you/your business?

70% think it will get them the needed support

Comments

- We never get any support
- its far too specific and frankly daunting
- It depends on other applications I imagine, funding available for projects overall. It is probably a first step along a longer process however may take a long time to process
- It is a first stage in explaining why I need support
- If you have read the Purpose section of the form correctly and still felt as though it is correct to complete it and push for the assistance from SE then I believe there is a good case for believing you/your business would get the support. SE wants to help out businesses that meet their goals/aims and therefore there is a shared interest for both parties. The form made me feel very positive.
- It seemed to have a founding principle of social responsibility - so providing I met the criteria for assistance and was requesting something which matched the ethos I don't see any problems provided I meet the social/environmental/economic criteria
- It feels fair, open and honest.

Follow up (3)

At any point while filling in the form did you notice the lack of any of these?

Save and come back later

90% (9)

Create an online account to review the submitted form

70% (7)

Create an online account to review the progress of the form

80% (8)

Follow up (4)

Overall, how easy or difficult are the questions to understand?



Difficult — Easy



Follow up (5)

If you were filling in this form for your company how would you find it?



Difficult — Easy



Follow up (6)

Overall the questions were?



Unclear — Clear



Follow up (7)

Please list top 3 benefits of this EOI form approach. (use n/a if no comment)

- Simple
- it weeds out people who are not committed it will make you do your research it might challenge you to think bigger for your business idea
- Brief. To the point. Get a quick decision (in theory)
- easy, userfriendly and fast approach
- Quick to complete. Clear to understand questions Clean layout
- clear easy to understand functional
- Clear at the outset what Scottish Enterprise are looking for before they would support a company Quick to complete if you have the information. Once you know you will need this information then process nice and quick each time you apply as info will be the same Clearly laid out
- Clear. Well laid out. Open, fair, honest.
- Clear questions, easy to understand, not too much information

Follow up (8)

Please list top 3 drawbacks of this EOI form approach. (use n/a if no comment)

- Is it worth doing, we never get support, so why bother
- the language is very daunting, its incredibly condescending and they really have too high expectations
- Cannot give a lot of detail and show off my project
- Not the best format to complete online (without printing it out and completing manually) Not a better description of 'project' and some terminology may be lost on some Would be nicer to have an expected response time on the form for when you would likely hear back about success/no success
- time consuming formulaic can't think of 3rd
- Would be better as an online form that could be saved and reused no other drawbacks
- Not being able to start and save for later, but equally the form can be used as a guide to prepare details to then fill it in all together,
- use of word document instead of online, lack of save feature, lack of help section, easy to understand, not too much information

Recomendations

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