



## Methodology

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- In conducting this research a telephone methodology was employed. The 10 minute questionnaire had been utilised for many years and remained consistent to enable comparisons with previous waves.
- Throughout the fieldwork period, Millward Brown interviewers worked under direct supervision, with approximately 10% of all interviews being monitored by the Call Centre manager using remote 'listening in' facilities. This process ensures that the quality and consistency of interviewing is maintained at all times, fully complying with the standards enshrined within IQCS (Interviewer Quality control Scheme). During each shift, interviewers provided feedback on an ongoing basis so any issues arising could be resolved and dealt with in real time.
- **All research conducted in accordance with ISO 9001:2008, the international quality standard ISO 20252: 2012 and the Market Research Society ethical Code of Conduct. MRQSA Market Research Quality Standards Authority.**

## Sample

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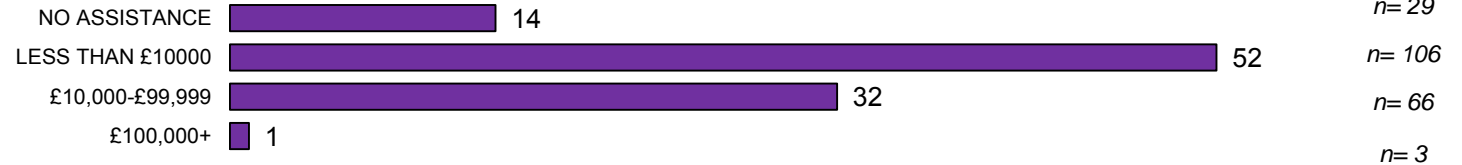
- Some 204 interviews were completed, 76 of these were Account Managed Customers and 97 were Regional Office Customers, all who accepted a letter of offer or support between January 2019 and March 2019. A sample of 31 were the Wider Business Base who had some form of interaction with Invest NI between January 2019 and March 2019. Of the 204 participating customers and WBB, 156 Customers and 25 WBB agreed to their responses being attributable. These responses have been provided in a separate report.
- Within this report, top line scores for Account Managed Customers, Regional Office Customers and WBB are illustrated for comparison purposes.
- The data has also been broken down by level of financial assistance and support area (grant support and programme support).
- Caution should be applied when comparing some of the results due to the very small base sizes involved in some instances. They should be seen as indicative rather than conclusive.

# Analysis of Sample

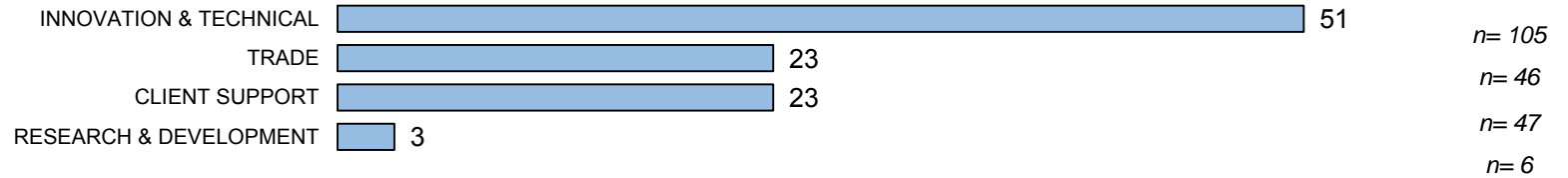
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Base

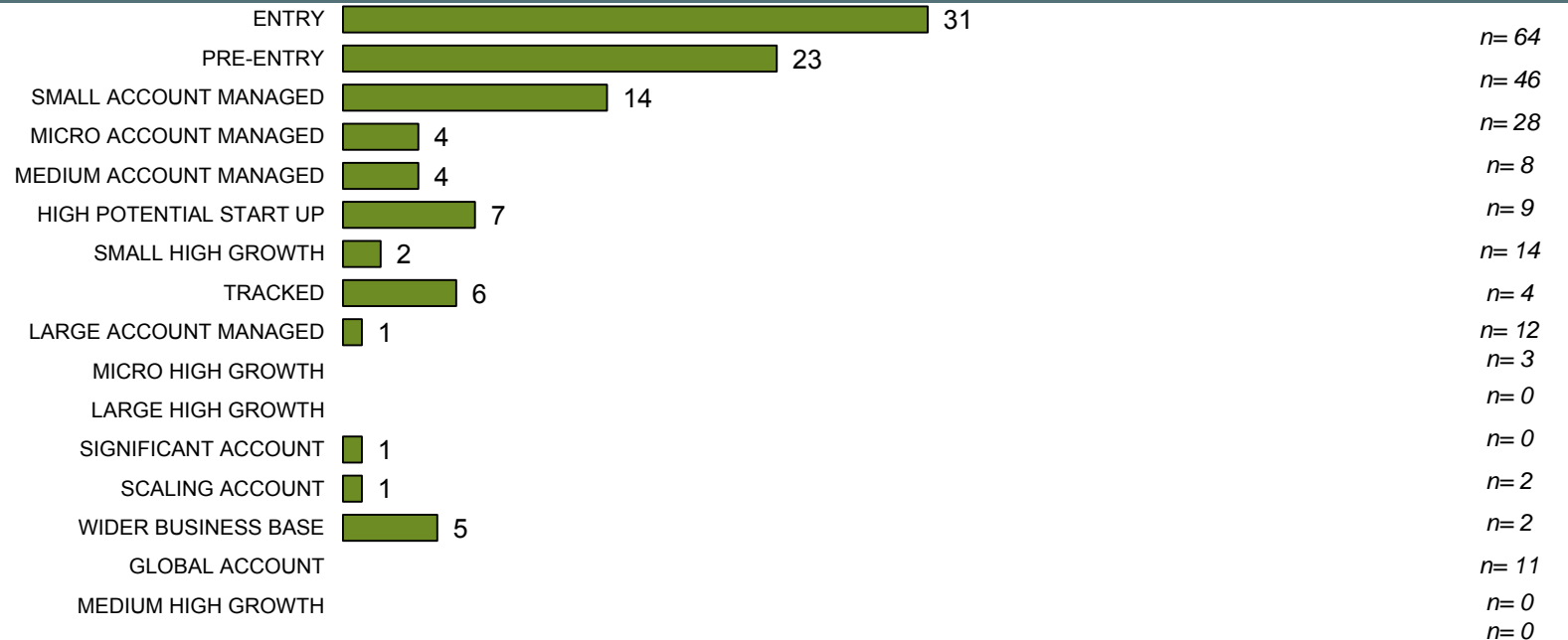
## Assistance



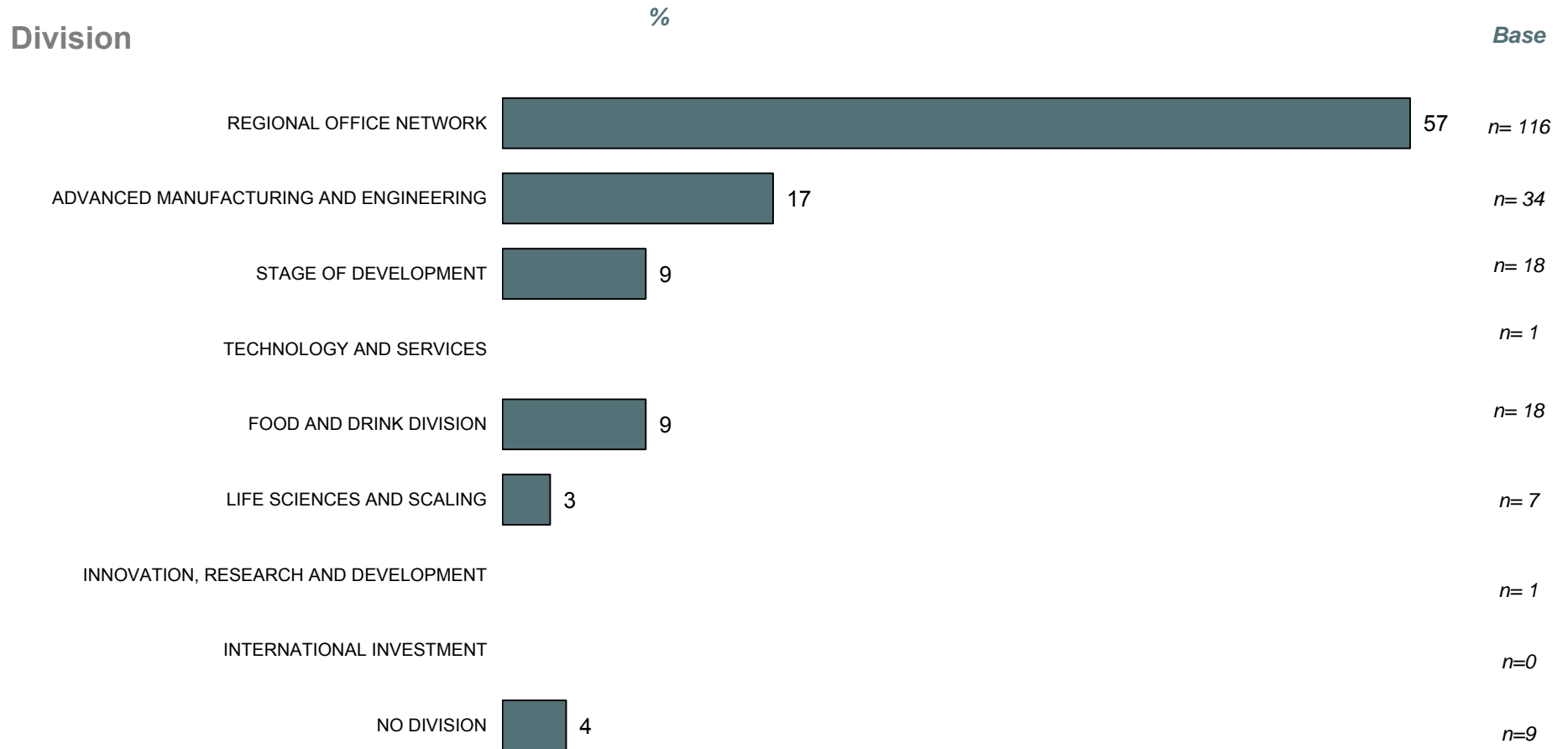
## Support Area



## Segment



# Analysis of Sample cont'd



## Technical Note

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- **NOTE:** *In some instances there may be a difference of 1% between the figures depicted on the charts and in the commentary e.g. 45% agree strongly, 45% agree slightly, but the overall agreed figure is 97%. This is due to a rounding of decimal places. In this example, the original results may have been 44.6% and 44.6% thus each rounded up to 45%. When combined this equals 97.2%, which is presented as 97%.*

## Executive Summary (1) – Customers

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### Key Performance Indicators

- In Q4 2019, satisfaction with overall service received remained consistently high across the total sample with 9 in 10 (90%) claiming to be satisfied. Within this, almost 7 in 10 (68%) were 'very satisfied' with Invest NI overall. These satisfaction results are slightly down on Q3 2018 (96%) findings.
- Over 9 in 10 of Account Managed Customers surveyed (94%) stated they were satisfied. Around three quarters (74%) of Account Managed Customers expressed they were 'very satisfied' (Similar to Q3 2018 - 76%).
- Overall levels of satisfaction among Regional Office Customers (89%) was slightly lower than Q3'18 (95%) results, and there was a marginal decline in those who claimed to be 'very satisfied' (from 74% to 71%) .
- This quarter only 31 wider business base customers were surveyed so the base is too small to draw any conclusions from but the vast majority (81%) were satisfied.
- Levels of satisfaction remained high across both support areas. Grant support received a mean score of 4.55 (up from Q3'19 at 4.92) and Programme support received a mean score of 4.54 (up from 4.65 in Q3'19).

## Executive Summary (2) – Customers

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### Key Performance Indicators

- In Q4 2019, advocacy levels were high with almost 9 in 10 (85%) customers stating they would speak highly of Invest NI (lower than Q3'18 at 94%).
- Advocacy levels were highest among Account Managed Customers (88%), lower than Q3 level (95%). Advocacy levels were also high among Regional Office customers at 86%, although declining since Q3'18 (94%). Of the 31 WBB customers participating, 25 would speak highly of Invest NI.
- Levels of advocacy were similar for Grant and Programme support, receiving a mean score of 4.43 and 4.41 respectively. These results were lower than Q3'18 for Grant support (4.76) but higher across Programme support (4.35 Q3'18).
- Invest NI achieved a Net Promoter Score of +64 (Q3'18 +55). The Net Promoter Score among Regional Office Customers (+72) increased from +43 in Q3'18. The Net Promoter Score amongst Account Managed Customers was +62 and +42 across the WBB.



## Executive Summary (3) – Customers

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- Over 4 in 5 (84%) customers agreed that Invest NI was helping to develop their business, levels slightly lower than Q3'18 (91%). Agreement was higher amongst Account Managed Customers (90%) and similar across Regional Office Customers (82%). Agreement was also similar among the WBB (81%).
- In terms of support areas, the highest mean score in relation to Invest NI helping develop business was achieved among those receiving grant support (4.5) compared to programme support (4.4). Figures for grant and programme support had declined marginally from Q2'18 (4.72 and 4.47 respectively).
- There was almost universal agreement amongst customers (95%) that Invest NI acts with professionalism and integrity, with three quarters (75%) of customers strongly agreeing with this sentiment, higher than Q3'18 (67%). Agreement levels were high among Regional Office Customers (93%) and Account Managed Customers (99%). Positive levels were also recorded amongst the WBB (90%).
- Levels of agreement were high across the support areas, with Grant support receiving a mean score of 4.74, similar to Q3 18 (4.8), and Programme support receiving a mean score of 4.68, again fairly consistent with the previous quarter (4.6).
- Levels of agreement that Invest NI exceeded expectations were lower than what was recorded in Q3'18 (74% in Q4 compared to 83% in Q3). Agreement levels were consistent among Account Managed (77%) than Regional Office Customers (76%).

## Executive Summary (4) – Customers

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- In Q4'19, over 4 in 5 (83%) customers agreed that Invest NI delivered value to their business (lower than Q3'18 at 88%). Agreement levels were fairly consistent across the Account Managed (89%) and Regional Office customers (85%).
- Just over three quarters of customers (77%) agreed that they received information on additional support programmes that are available from Invest NI. These levels of agreement were again similar to Q3'18 (78%). Overall agreement among Regional Office customers was 77%. Account Managed customers had similar levels of agreement (79%).
- Almost 9 in 10 customers (87%) were in agreement that a realistic timescale was discussed and agreed for planned activities. A finding that was consistent with the previous quarter (85% in Q3'18).
- Agreement levels among Account Managed customers (95%) had increased since Q3'18 (88%). Agreement levels among Regional Office customers (85%) had marginally declined since Q3'18 (88%).
- The vast majority (93%) were in agreement that Invest NI treated them fairly, down slightly since Q3'18 (99%). Across customer segments, agreement was higher among Account Managed customers (99%) than Regional Office customers (89%).

## Executive Summary (5) – Customers

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### Key Drivers of Satisfaction

- A key drivers' analysis conducted on the monthly survey data (at beginning of the contract) revealed the seven top drivers of satisfaction were:
  - Helping to develop customers' businesses;
  - Delivering value to customers' businesses;
  - Tailoring solutions to meet business needs;
  - Satisfaction with Client Executive;
  - Discussing and agreeing a realistic timescale for planned activities;
  - Responding to queries in a reasonable timeframe; and
  - Being clear at the start if and how Invest NI could help customers' businesses.
- In Q4 2019, all key drivers of satisfaction achieved a mean score of no less than 4.34 out of a possible 5. The top five rated drivers for Q4 were responded to queries (4.57), clarity of communication (4.58), completed to agreed timetable (4.52), explained and agreed requirements (4.51) and discussed timetable (4.51).

## Executive Summary (6) – Customers

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### Detailed Performance Measures

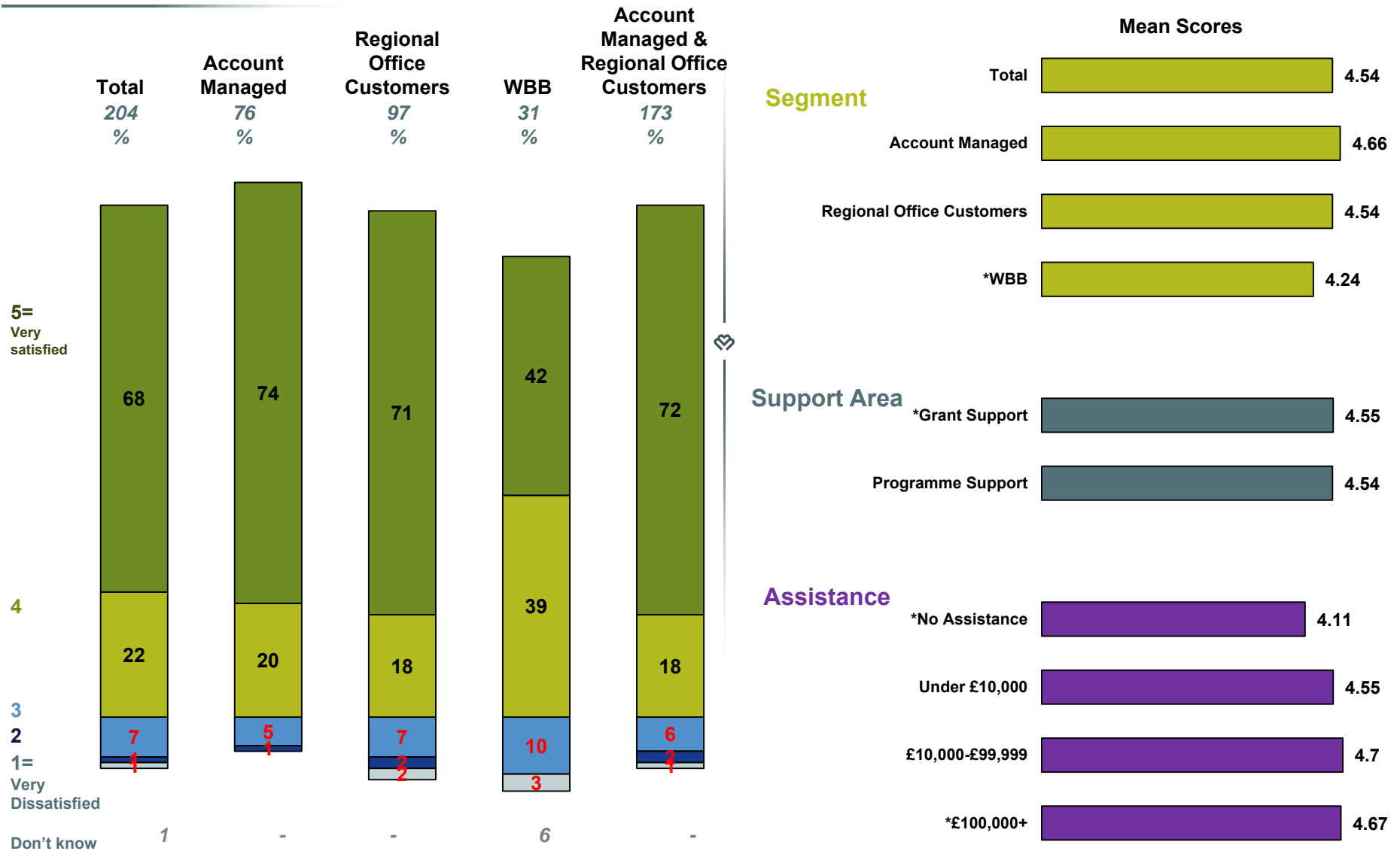
- In Q4 2019, the average mean score for overall performance was 4.45 out of a possible 5. The mean score was fairly consistent with Q3'18 (4.44).
- All performance areas achieved a mean score of no less than 4.34 out of a possible 5, slightly higher than Q3'18 (4.31).
- The strongest performing areas were responded to queries (4.57), clarity of communication (4.58), completed to agreed timetable (4.52), explained and agreed requirements (4.51) and discussed timetable (4.51).
- The weaker aspects of the engagement included understanding of business needs (4.34) and tailored response to business needs (4.34).
- The mean score for the overall performance by segment were as follows:
  - Account Managed customers = 4.52
  - Regional Office customers = 4.44
  - Wider Business base = 4.32

## SATISFACTION



# Key Performance Indicator – Satisfaction

\*Small Bases = less than 50



How satisfied or dissatisfied are you with Invest NI overall in relation to this project?

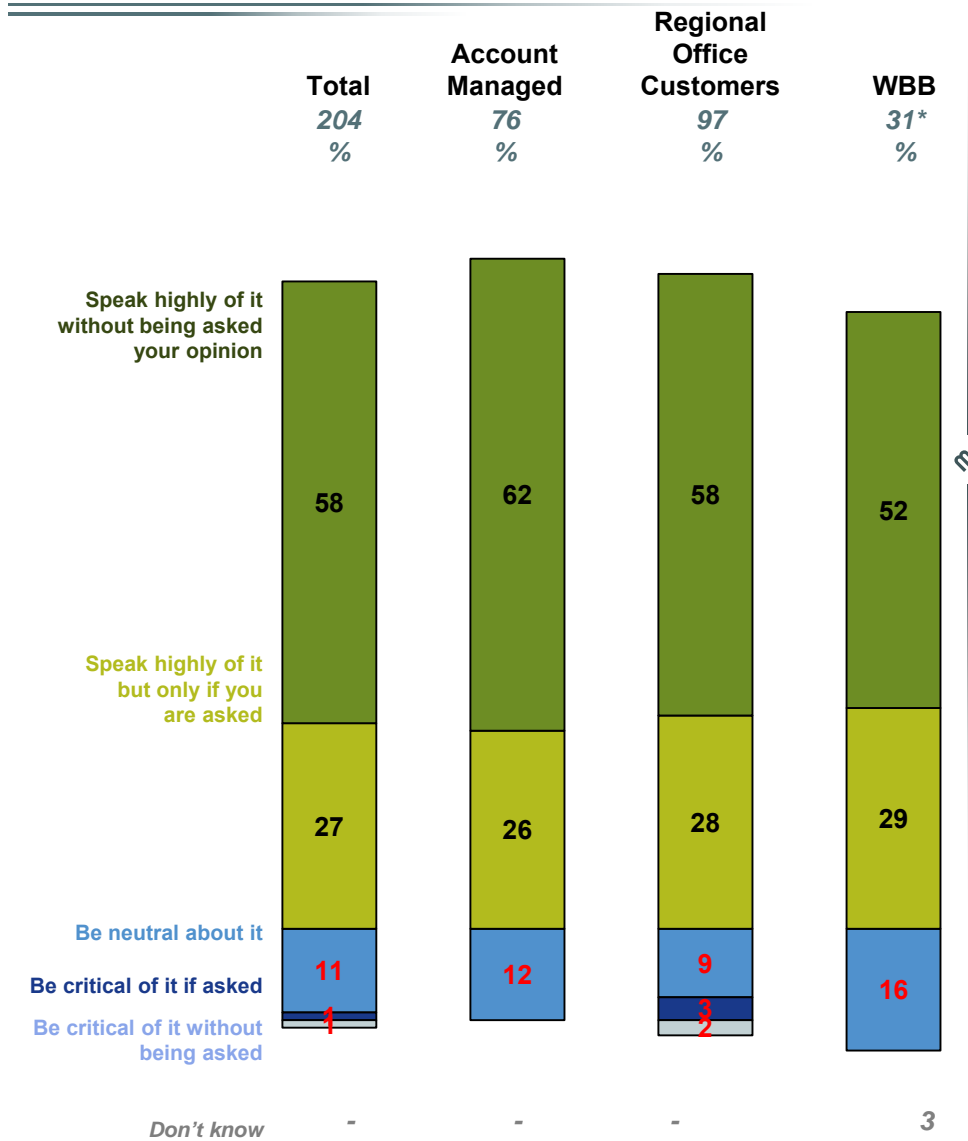
[ Base: 204 Jan'19-Mar'19 (76 Account Managed, 97 Regional Office Customers and 31\* WBB) ]

# ADVOCACY



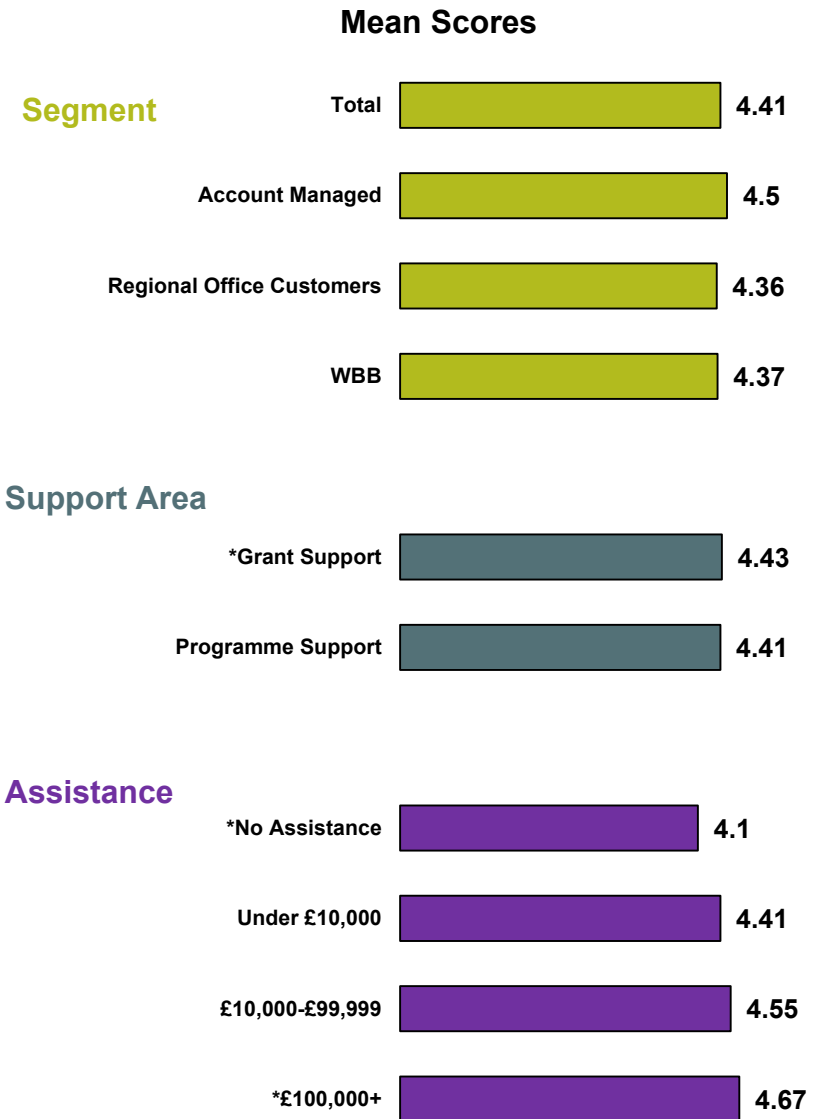
# Key Performance Indicator – Advocacy

*\*Small Bases = less than 50*



How highly would you speak about Invest NI?

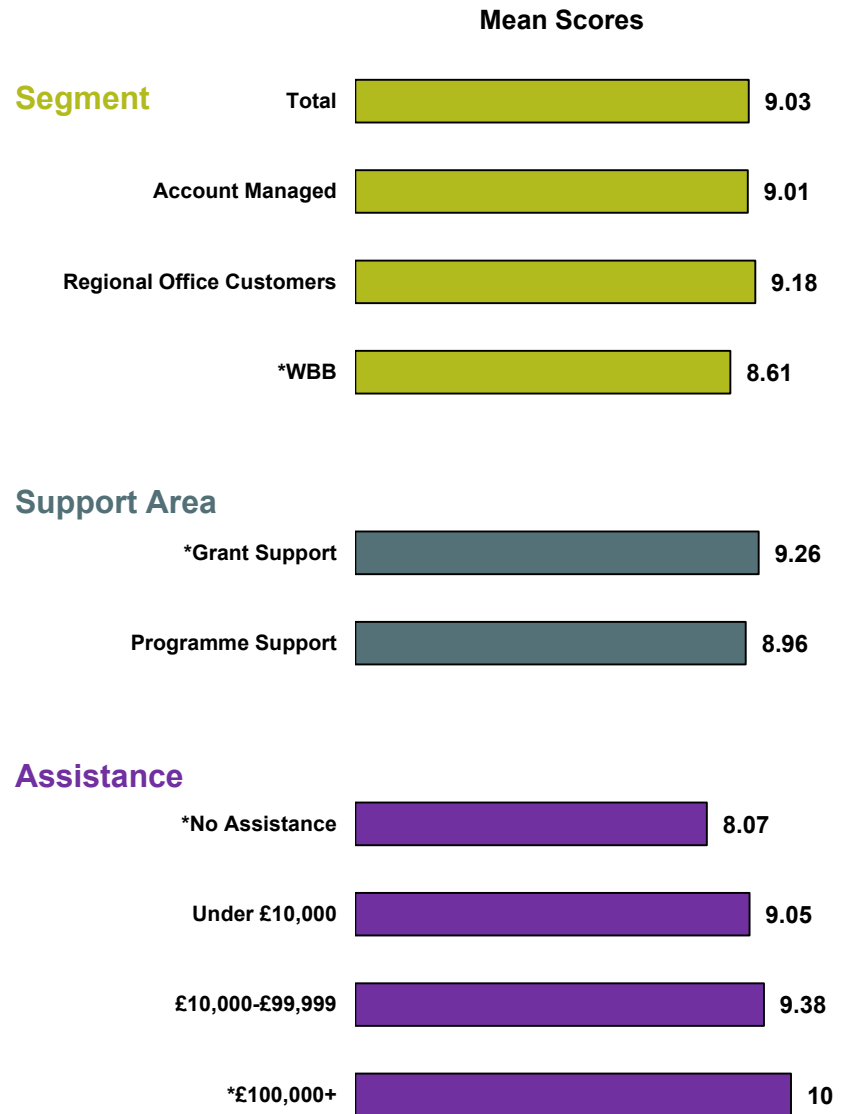
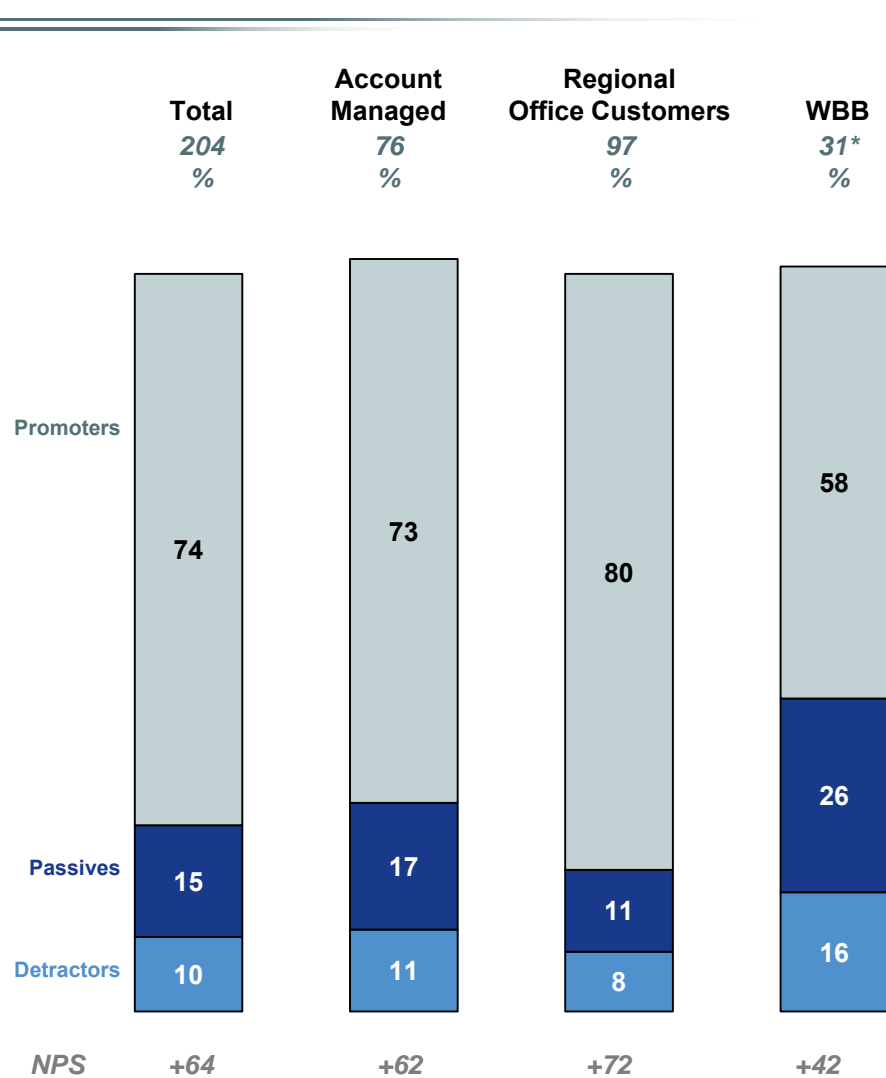
[ Base: 204 Jan'19-Mar'19 (76 Account Managed, 97 Regional Office Customers and 31\* WBB) ]





# Net Promoter Score

*\*Small Bases = less than 50*



On a scale of 0 to 10 where 0 is not at all likely and 10 is extremely likely, please indicate how likely you are to recommend Invest NI to a friend or colleague? [ Base: 204 Jan'19-Mar'19 (76 Account Managed, 97 Regional Office Customers and 31\* WBB) ]

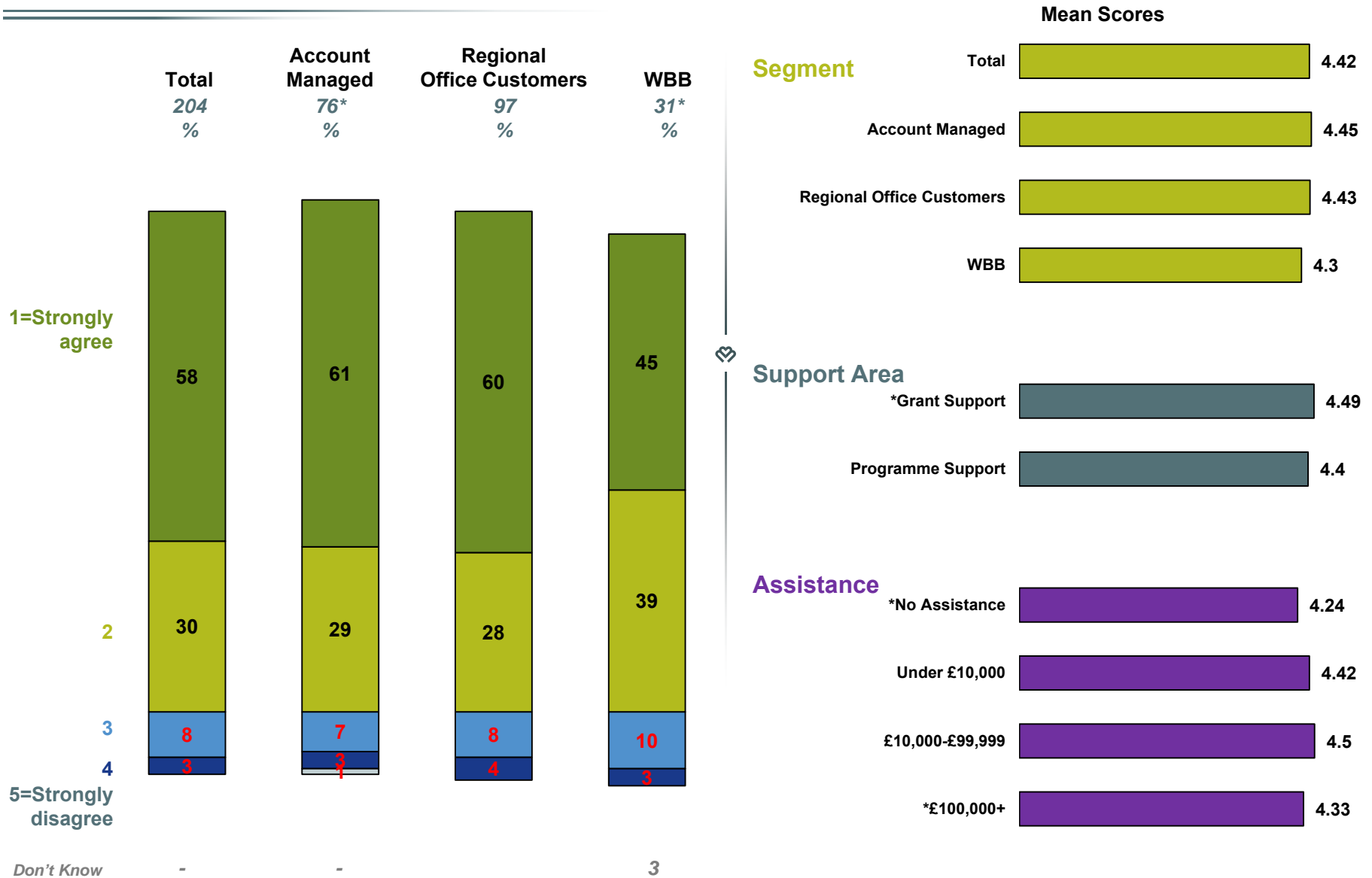
## CLIENT FOCUSED



# Key Performance Indicator – Client Focused

*‘Made it clear at the start if and how it could assist your business’*

*\*Small Bases = less than 50*

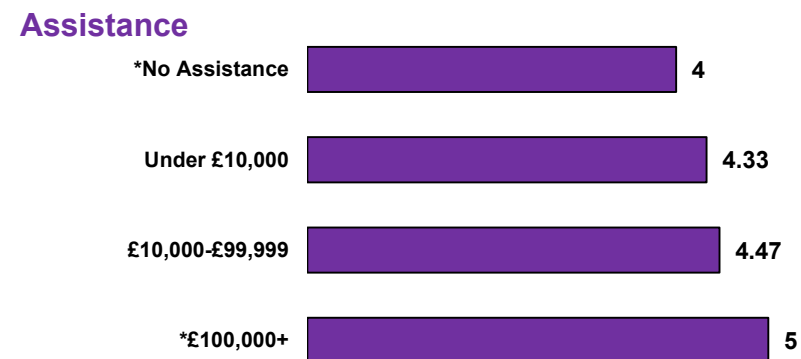
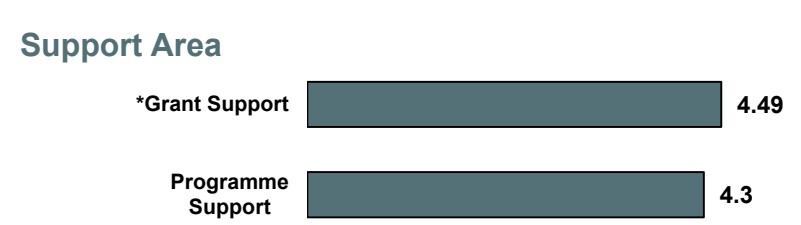
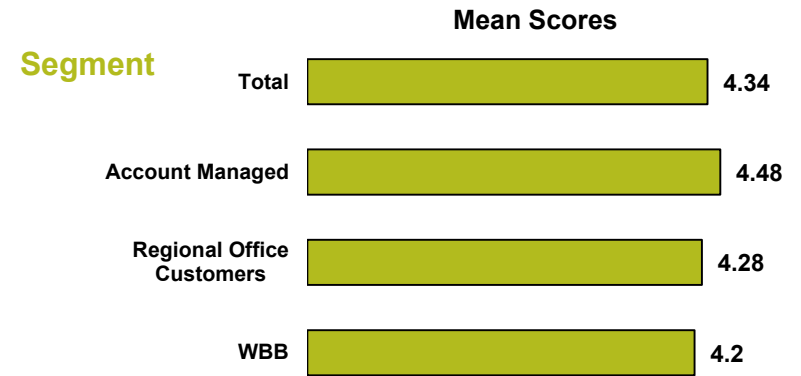
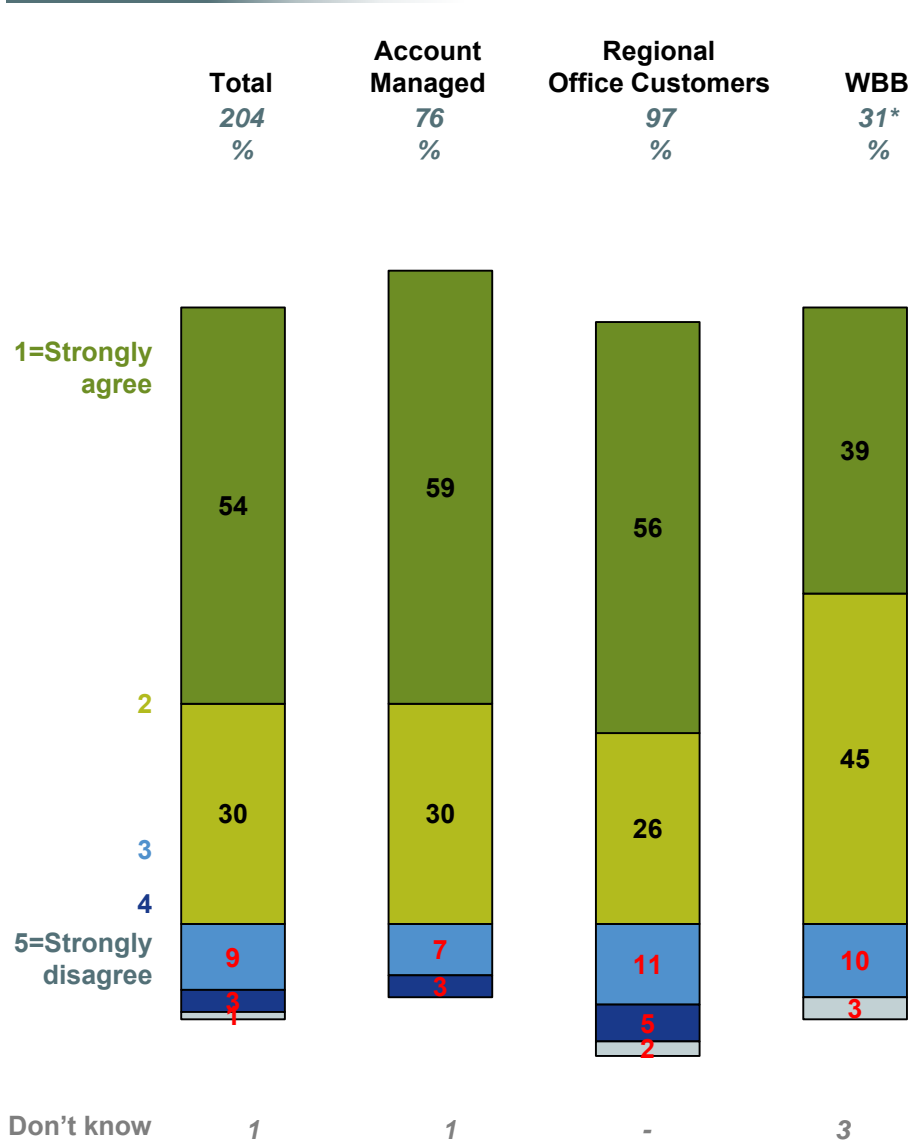


Using a scale from 1 to 5, where 1 means 'strongly agree' and 5 means 'strongly disagree', to what extent do you agree or disagree that Invest NI ...? [ Base: 204 Jan'19-Mar'19 (76 Account Managed, 97 Regional Office Customers and 31\* WBB) ]

# Key Performance Indicator – Client Focused

*‘Had sufficient understanding of your business needs’*

*\*Small Bases = less than 50*

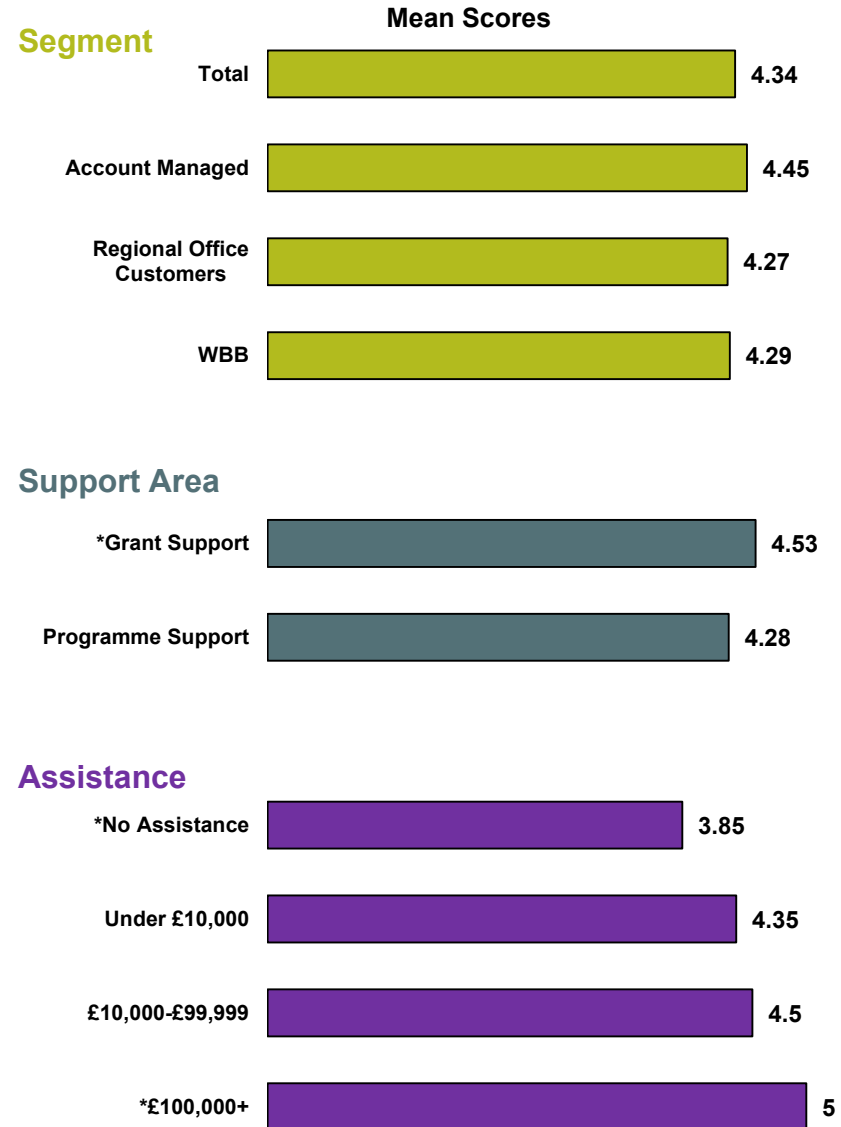
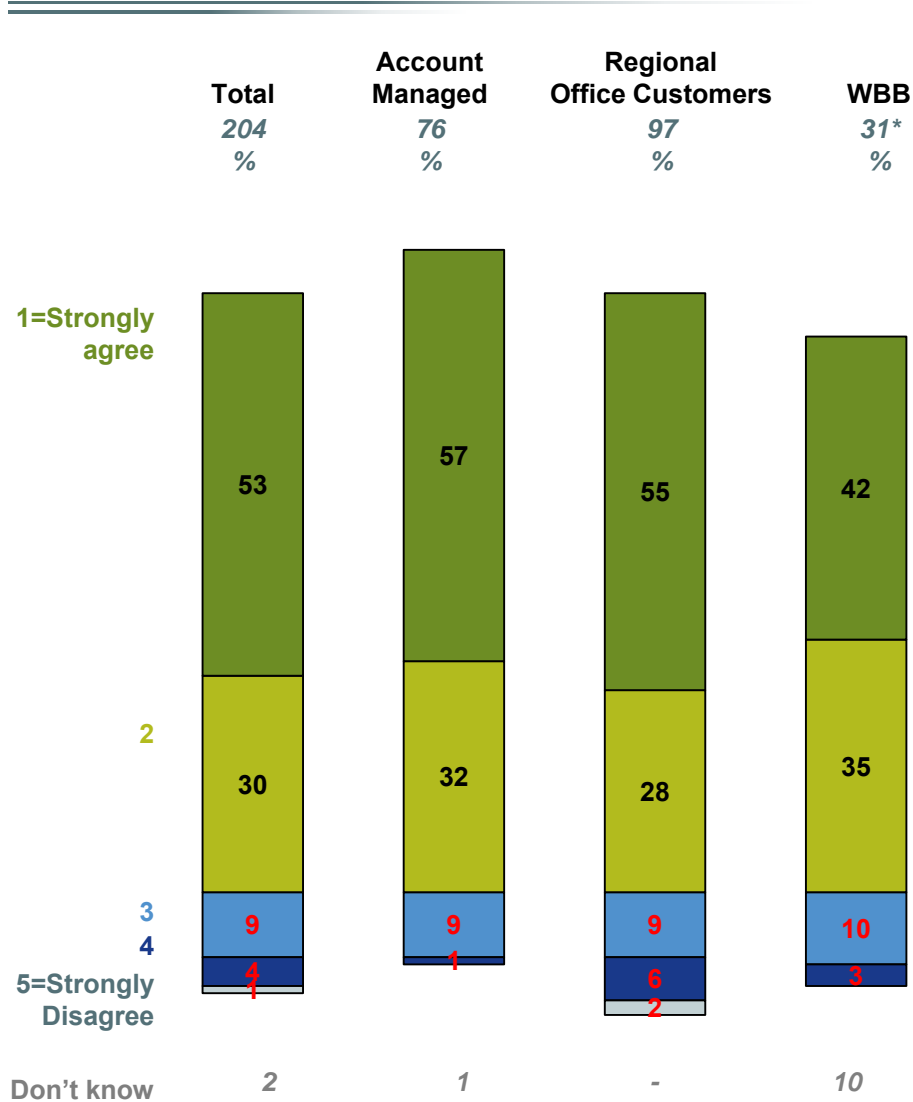


Using a scale from 1 to 5, where 1 means 'strongly agree' and 5 means 'strongly disagree', to what extent do you agree or disagree that Invest NI ...? [ Base: 204 Jan'19-Mar'19 (76 Account Managed, 97 Regional Office Customers and 31\* WBB) ]

# Key Performance Indicator – Client Focused

*‘Tailored its response to meet your business needs’*

*\*Small Bases = less than 50*

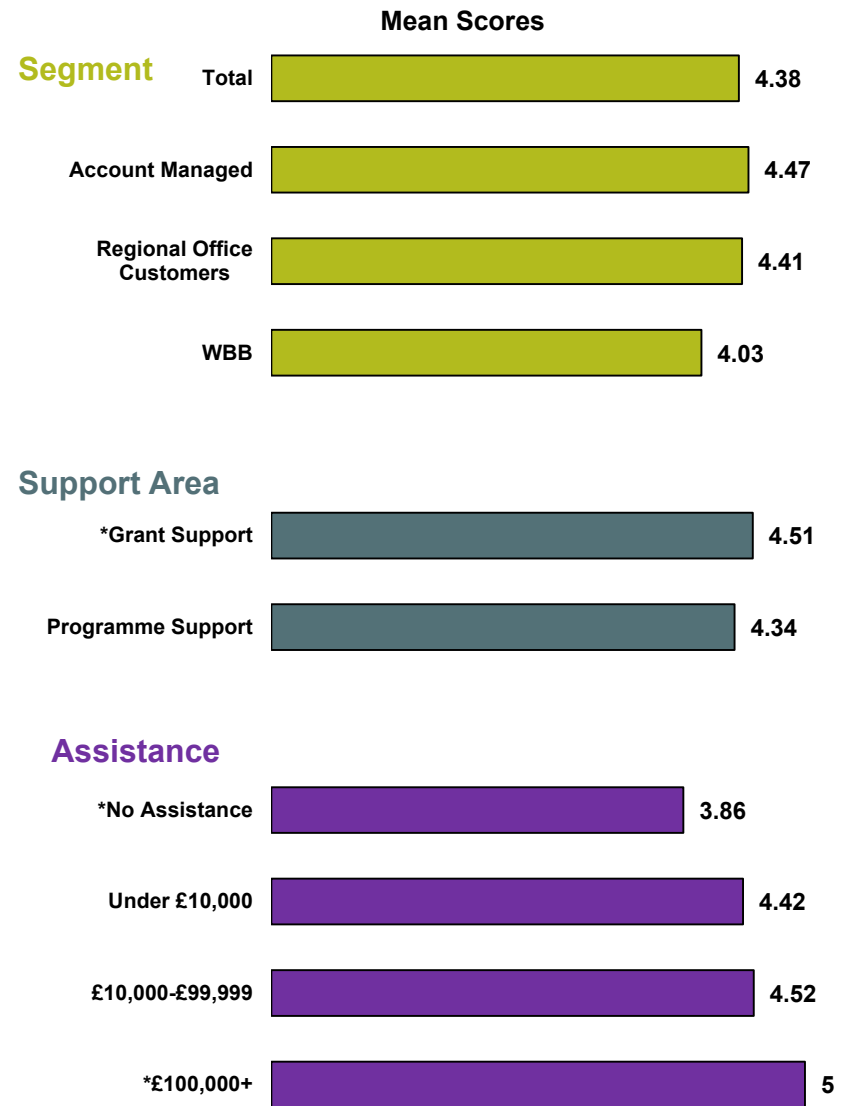
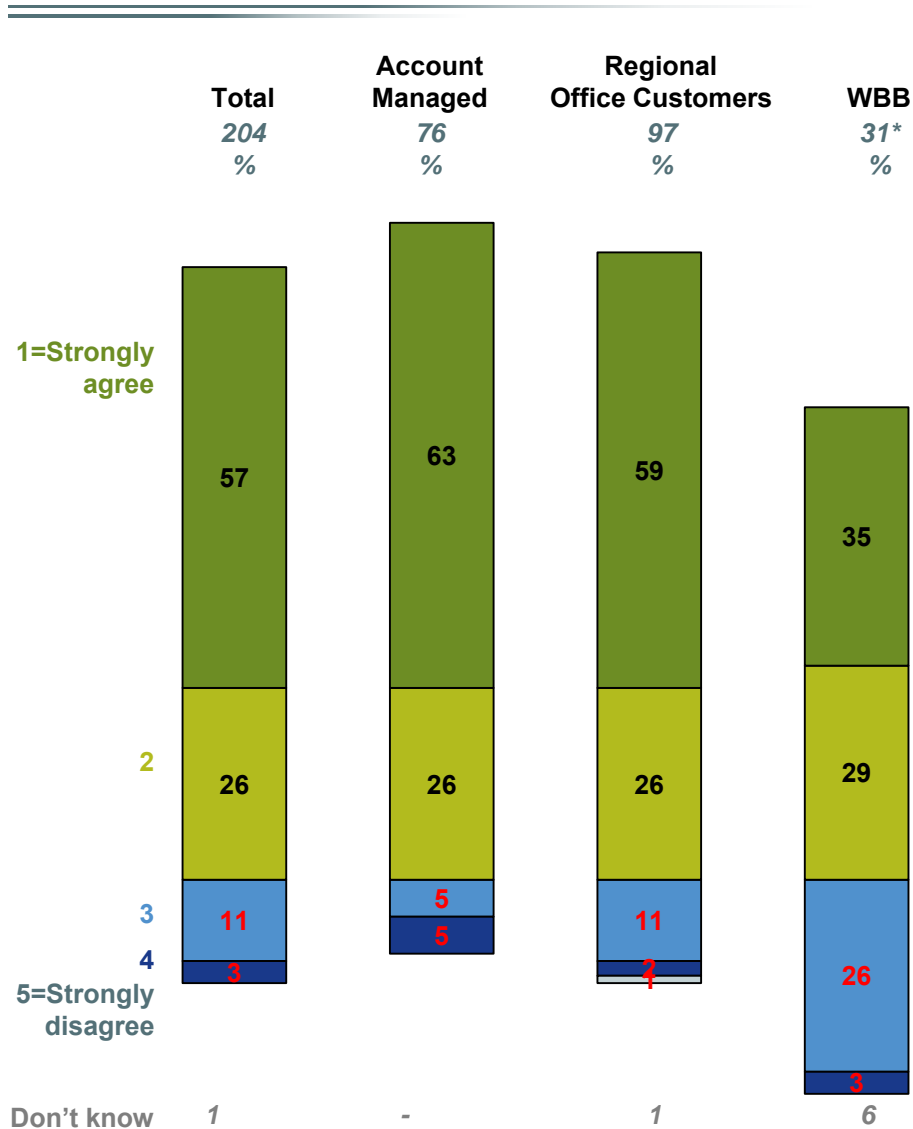


Using a scale from 1 to 5, where 1 means 'strongly agree' and 5 means 'strongly disagree', to what extent do you agree or disagree that Invest NI ...? [ Base: 204 Jan'19-Mar'19 (76 Account Managed, 97 Regional Office Customers and 31\* WBB) ]

# Key Performance Indicator – Client Focused

*'Delivered value to your business'*

*\*Small Bases = less than 50*

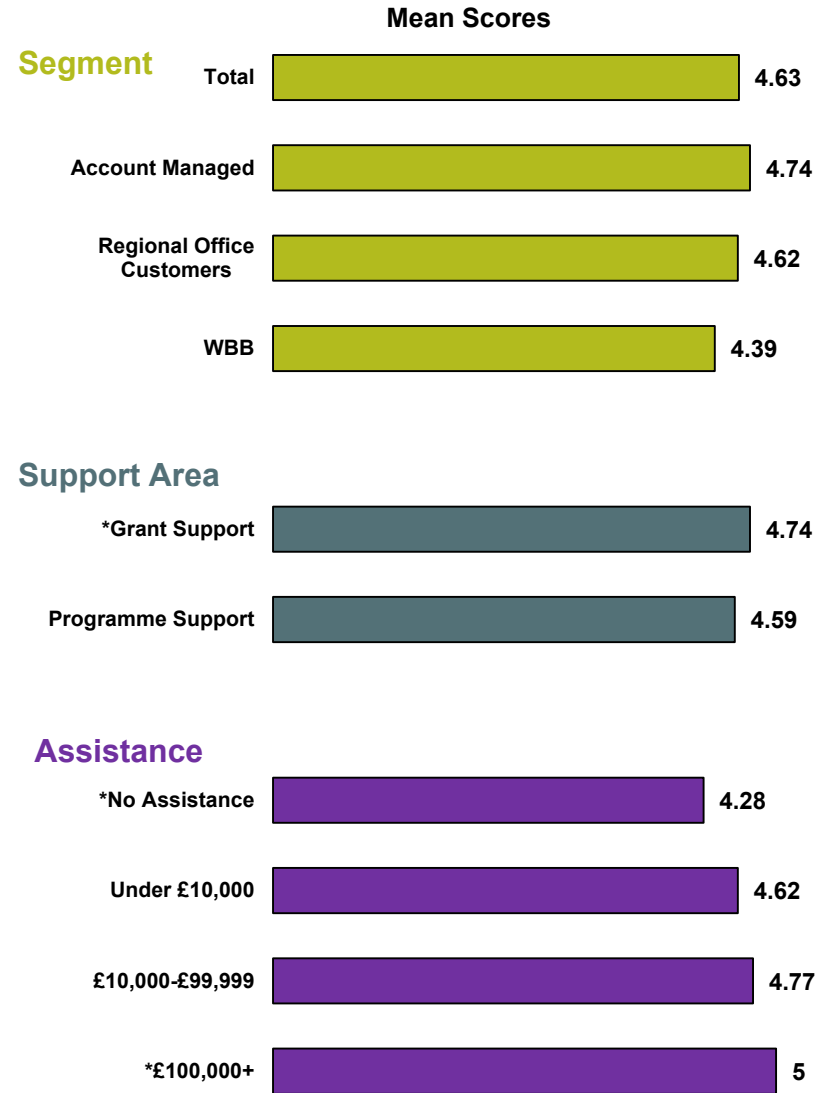
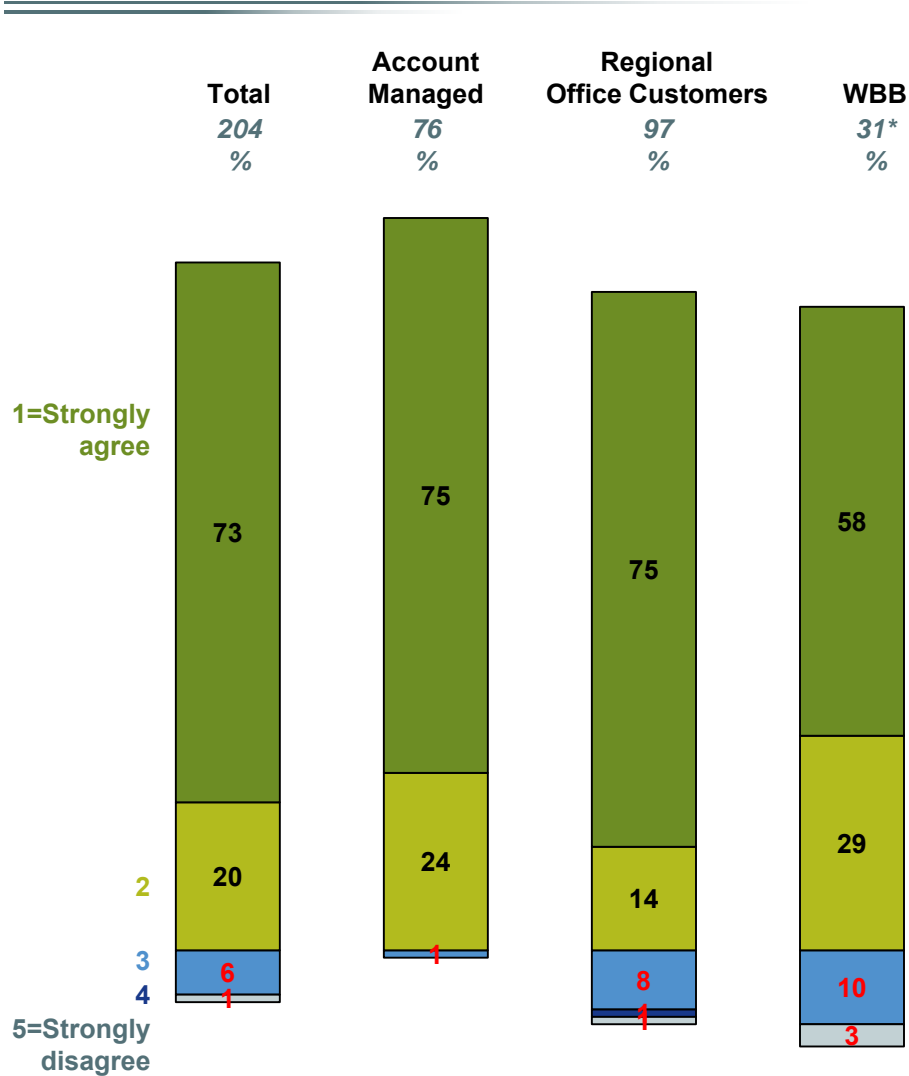


Using a scale from 1 to 5, where 1 means 'strongly agree' and 5 means 'strongly disagree', to what extent do you agree or disagree that Invest NI ...? [ Base: 204 Jan'19-Mar'19 (76 Account Managed, 97 Regional Office Customers and 31\* WBB) ]

# Key Performance Indicator – Client Focused

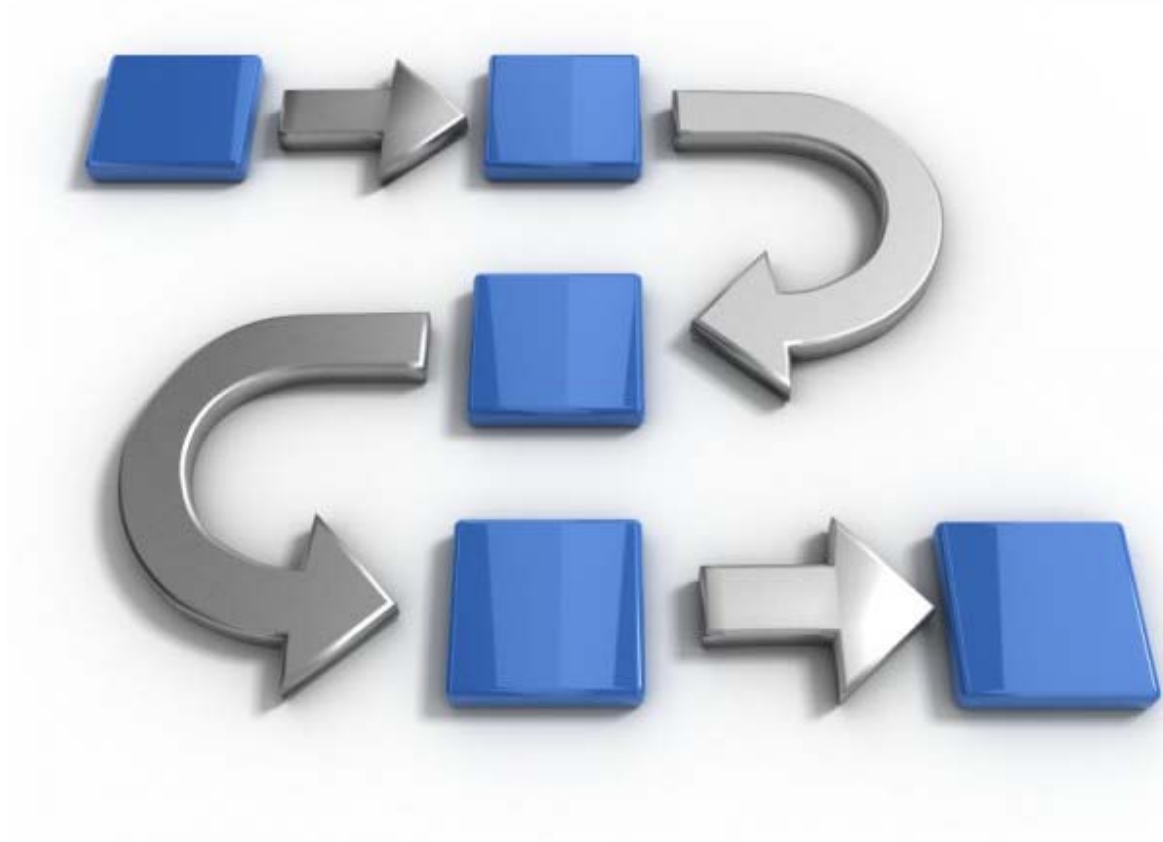
*‘Treated You Fairly’*

*\*Small Bases = less than 50*



Using a scale from 1 to 5, where 1 means 'strongly agree' and 5 means 'strongly disagree', to what extent do you agree or disagree that Invest NI ...? [ Base: 204 Jan'19-Mar'19 (76 Account Managed, 97 Regional Office Customers and 31\* WBB) ]

## PROCESS MANAGEMENT

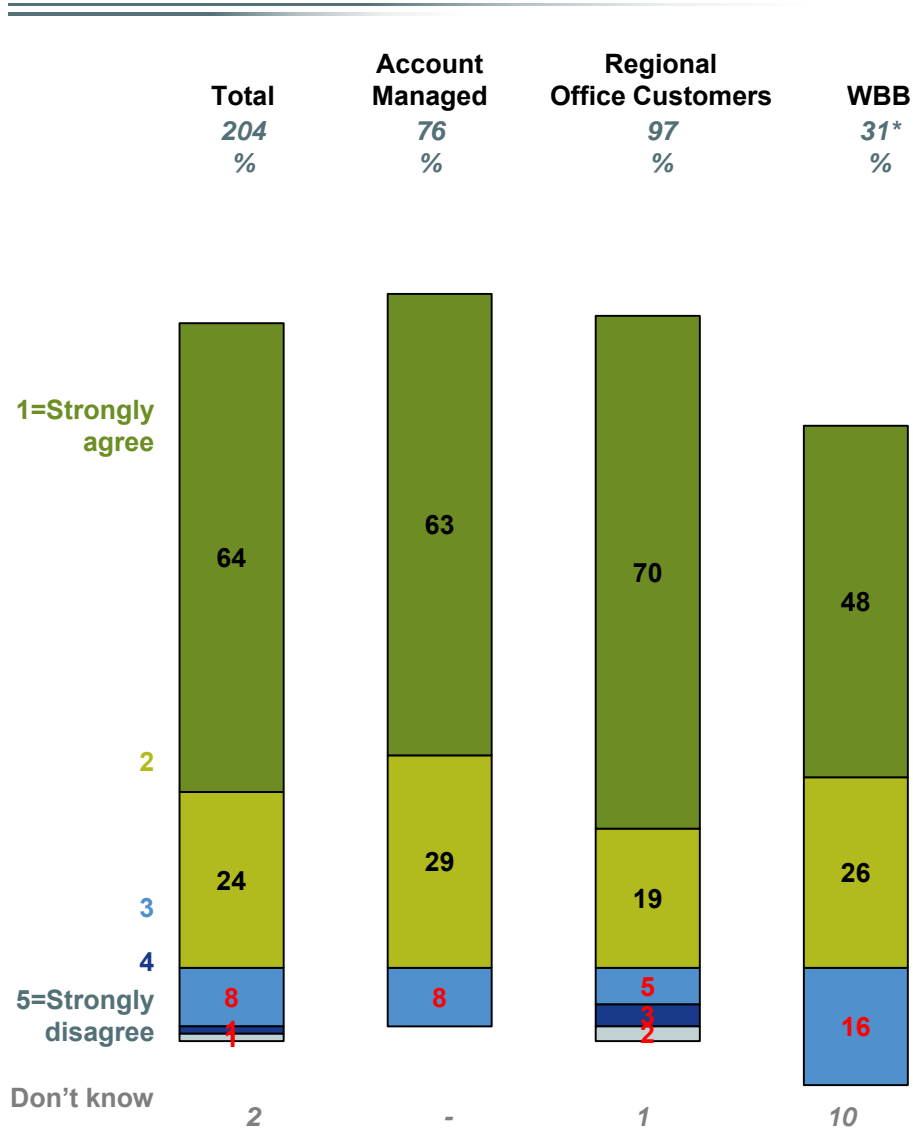




# Key Performance Indicator – Process Management

*‘Explained and agreed detailed requirements’*

*\*Small Bases = less than 50*

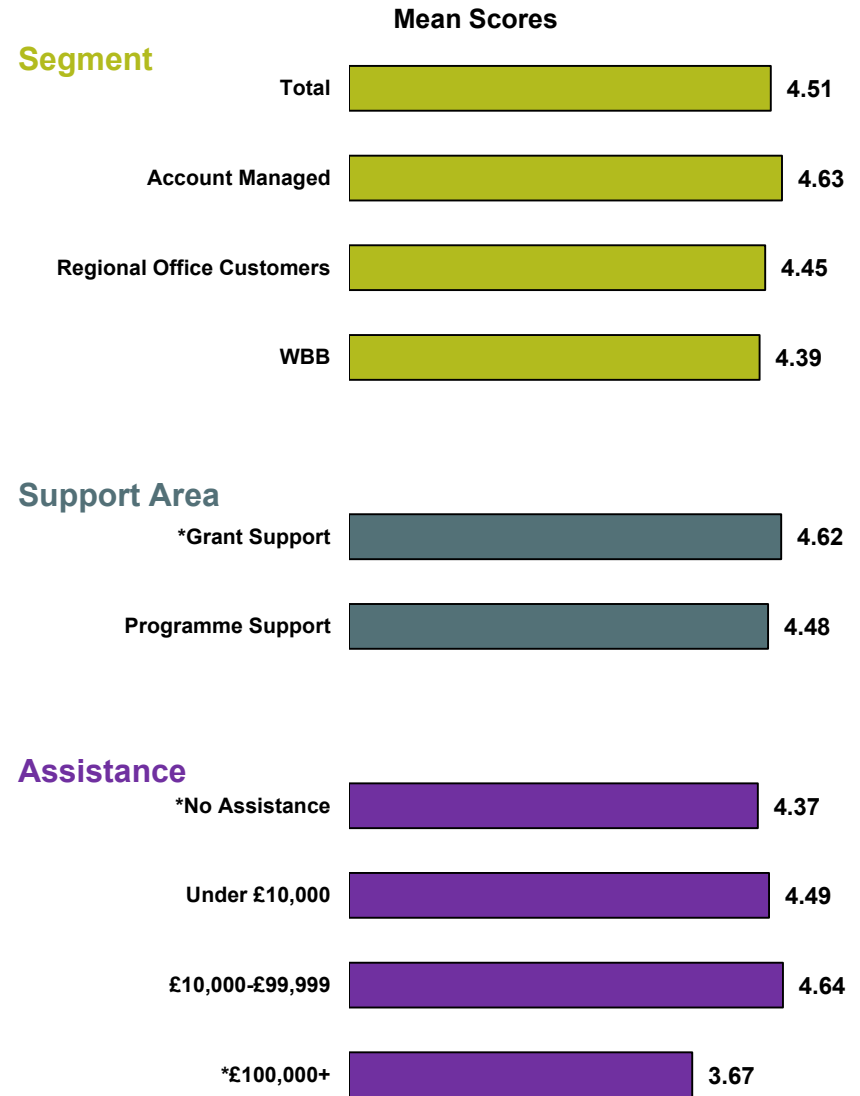
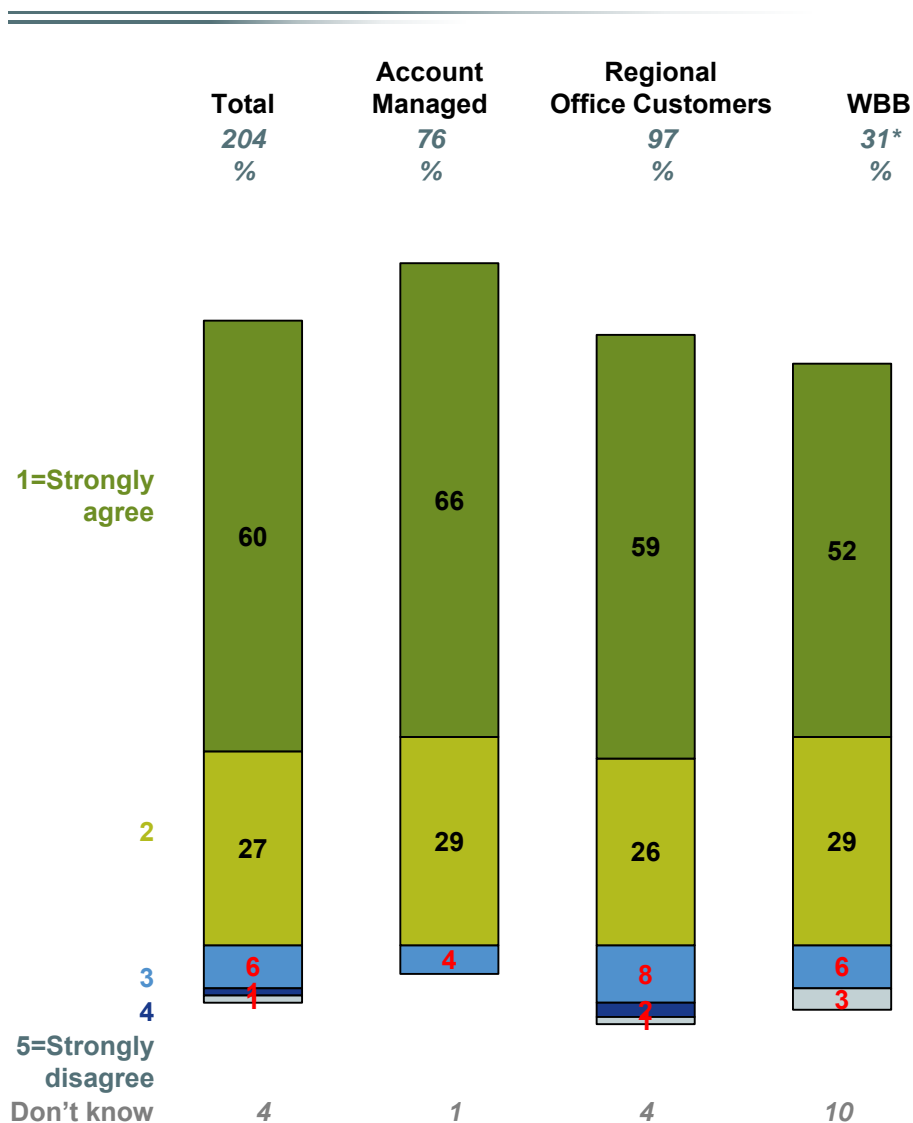


Using a scale from 1 to 5, where 1 means 'strongly agree' and 5 means 'strongly disagree', to what extent do you agree or disagree that Invest NI ...? [ Base: 204 Jan'19-Mar'19 (76 Account Managed, 97 Regional Office Customers and 31\* WBB) ]

# Key Performance Indicator – Process Management

*'Discussed and agreed a realistic timescale for planned activities'*

*\*Small Bases = less than 50*

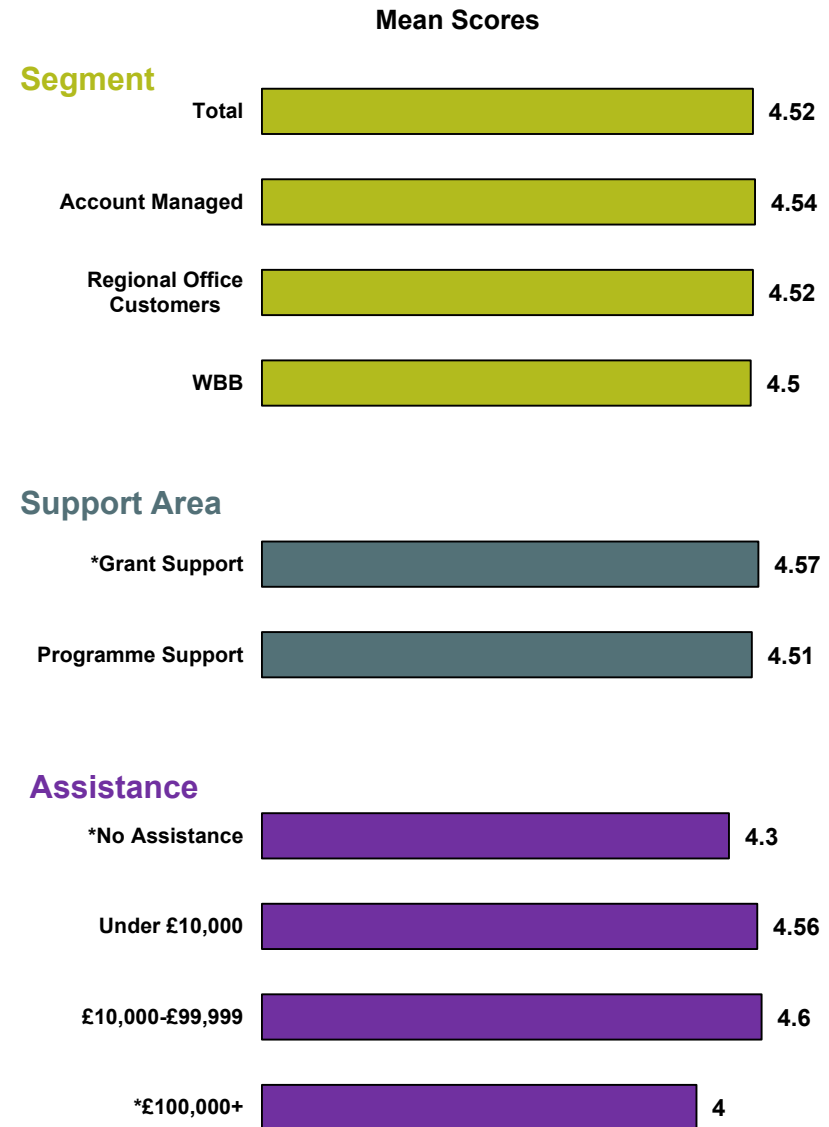
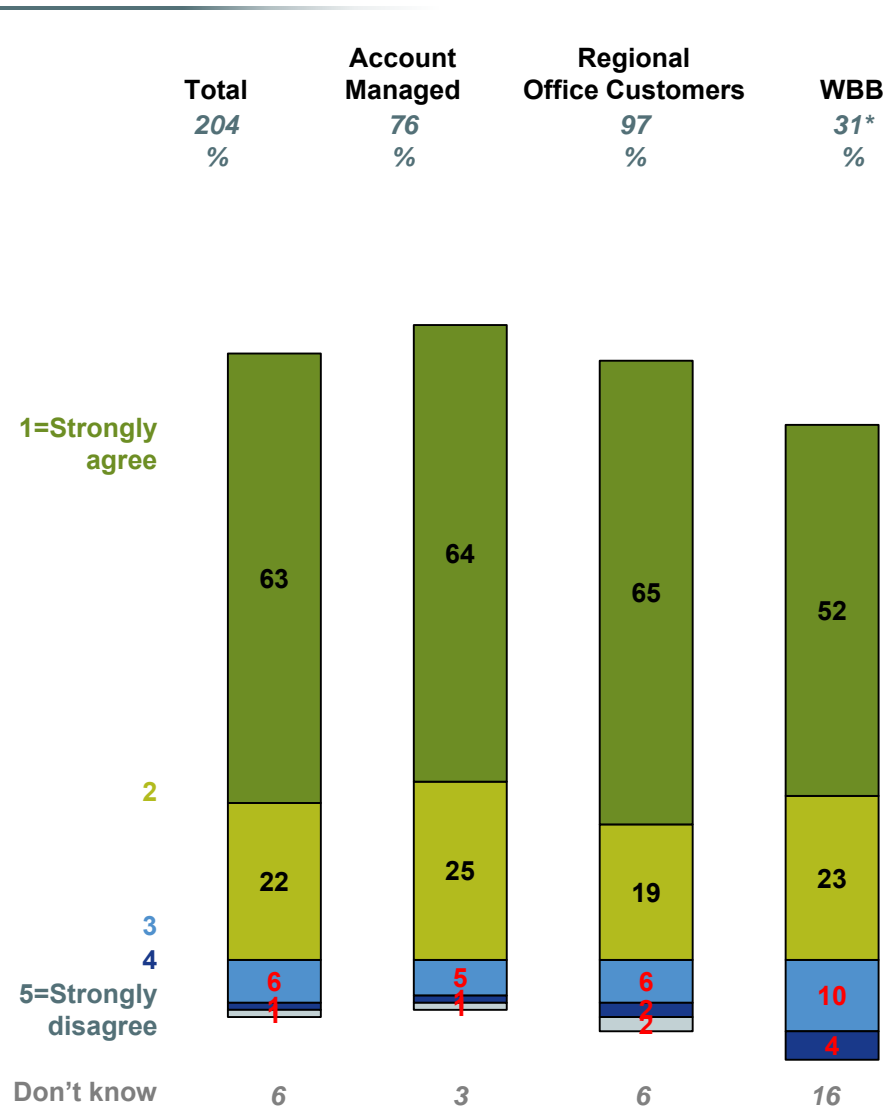


Using a scale from 1 to 5, where 1 means 'strongly agree' and 5 means 'strongly disagree', to what extent do you agree or disagree that Invest NI ...? [ Base: 204 Jan'19-Mar'19 (76 Account Managed, 97 Regional Office Customers and 31\* WBB) ]

# Key Performance Indicator – Process Management

‘Completed activities according to the agreed timeline’

\*Small Bases = less than 50

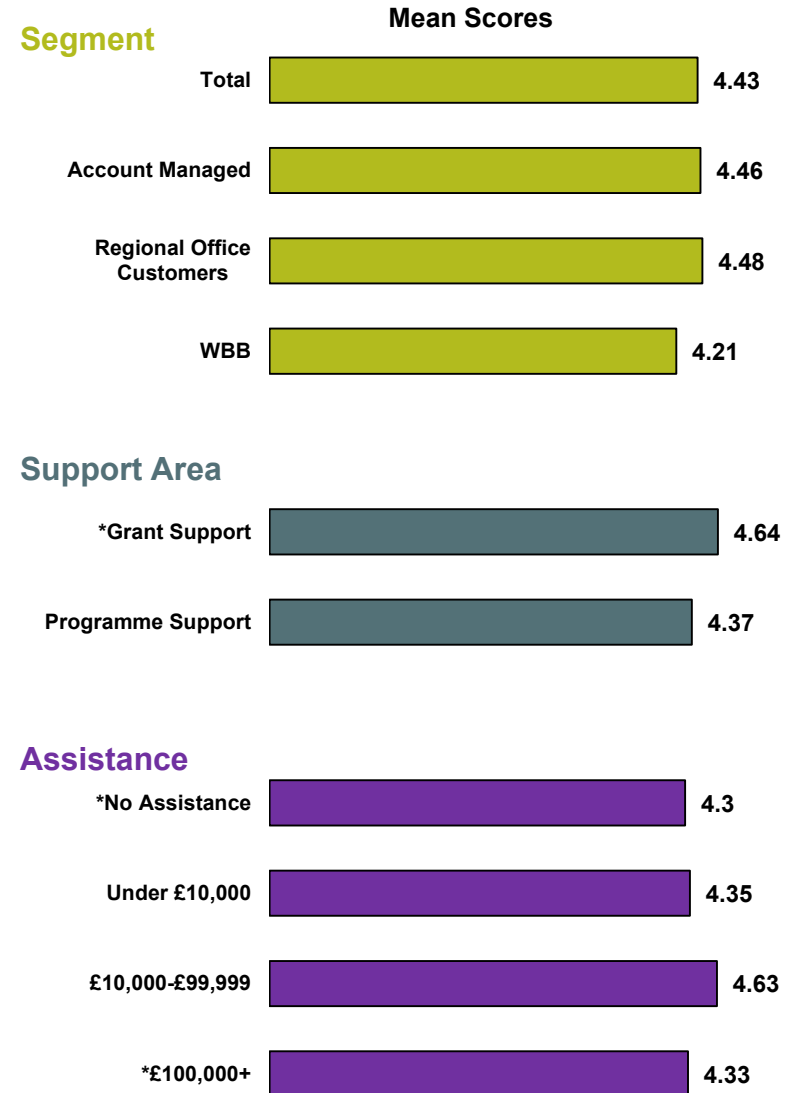
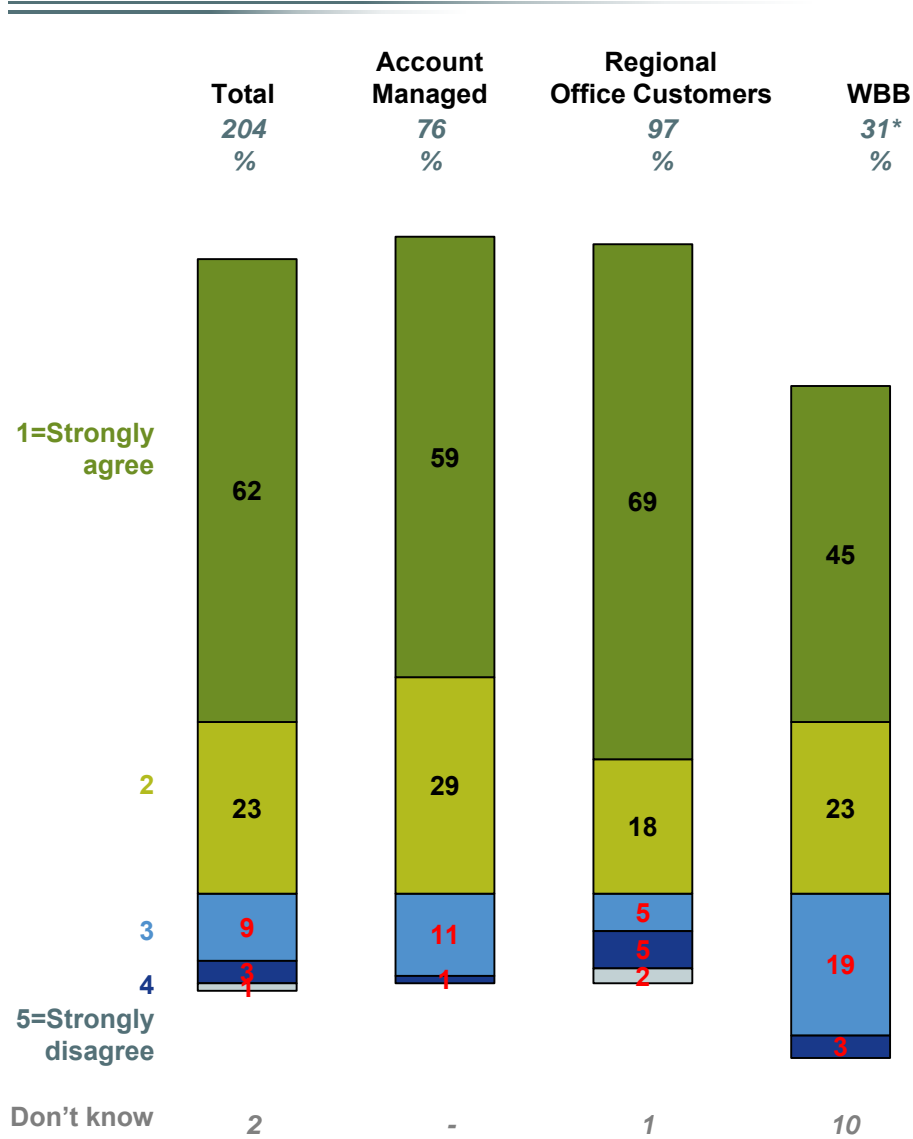


Using a scale from 1 to 5, where 1 means ‘strongly agree’ and 5 means ‘strongly disagree’, to what extent do you agree or disagree that Invest NI ...? [ Base: 204 Jan’19-Mar’19 (76 Account Managed, 97 Regional Office Customers and 31\* WBB) ]

# Key Performance Indicator – Process Management

*'Was proactive in providing advice and support'*

*\*Small Bases = less than 50*

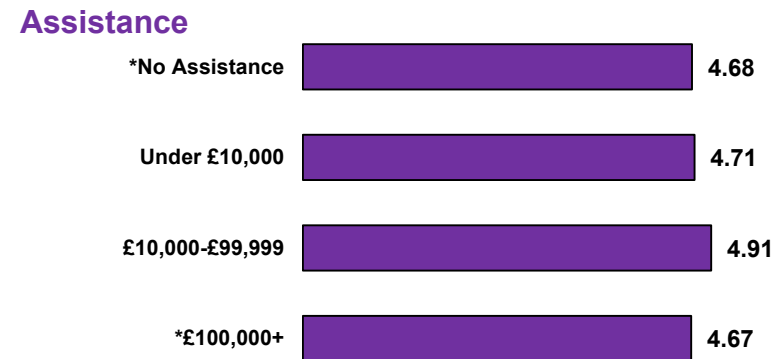
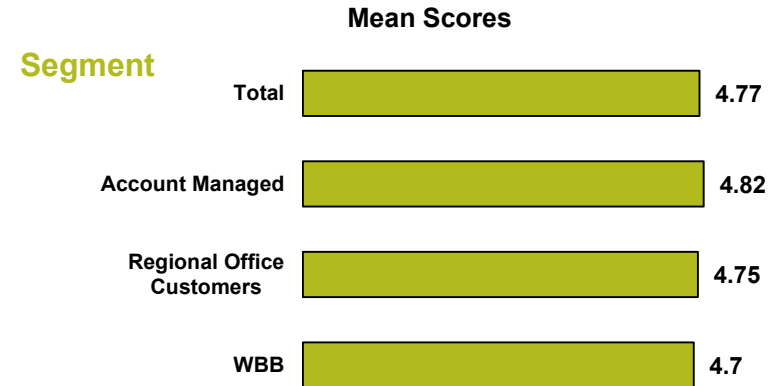
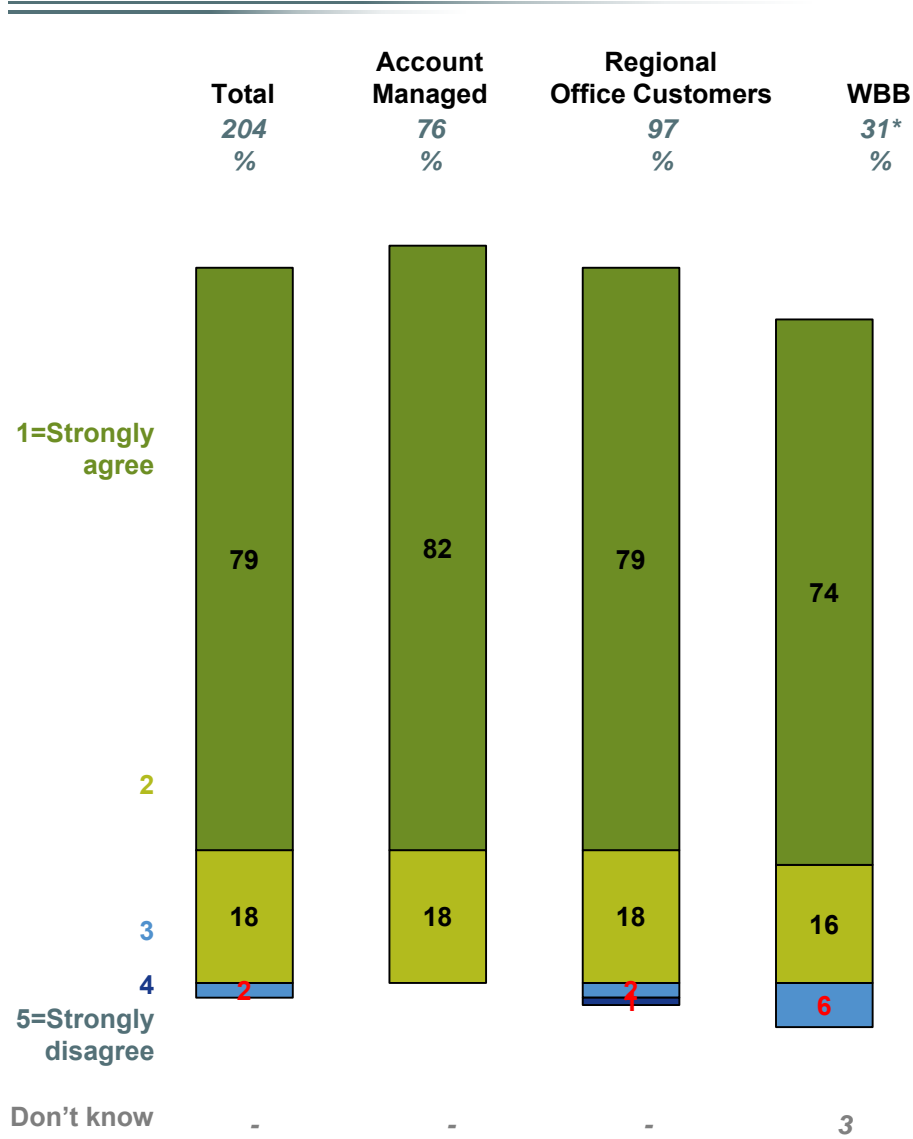


Using a scale from 1 to 5, where 1 means 'strongly agree' and 5 means 'strongly disagree', to what extent do you agree or disagree that Invest NI ...? [ Base: 204 Jan'19-Mar'19 (76 Account Managed, 97 Regional Office Customers and 31\* WBB) ]

# Key Performance Indicator – Process Management

*‘Were Polite and Friendly’*

*\*Small Bases = less than 50*



Using a scale from 1 to 5, where 1 means 'strongly agree' and 5 means 'strongly disagree', to what extent do you agree or disagree that Invest NI ...? [ Base: 204 Jan'19-Mar'19 (76 Account Managed, 97 Regional Office Customers and 31\* WBB) ]

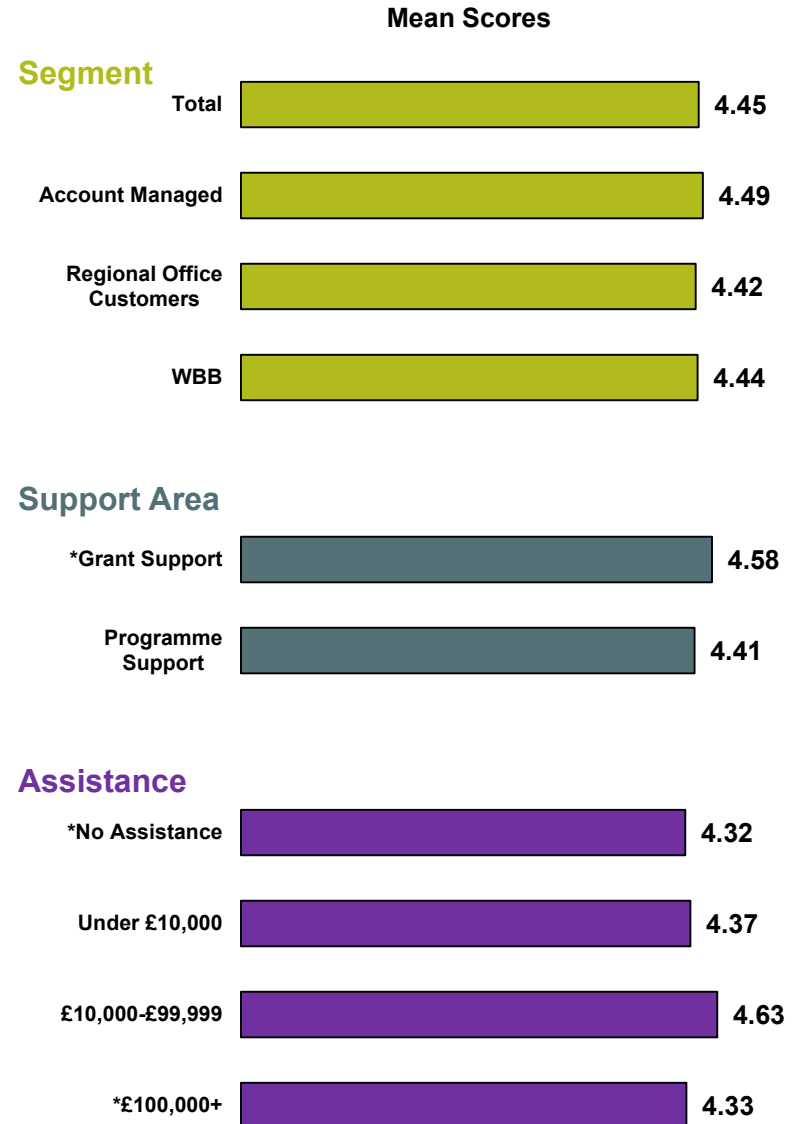
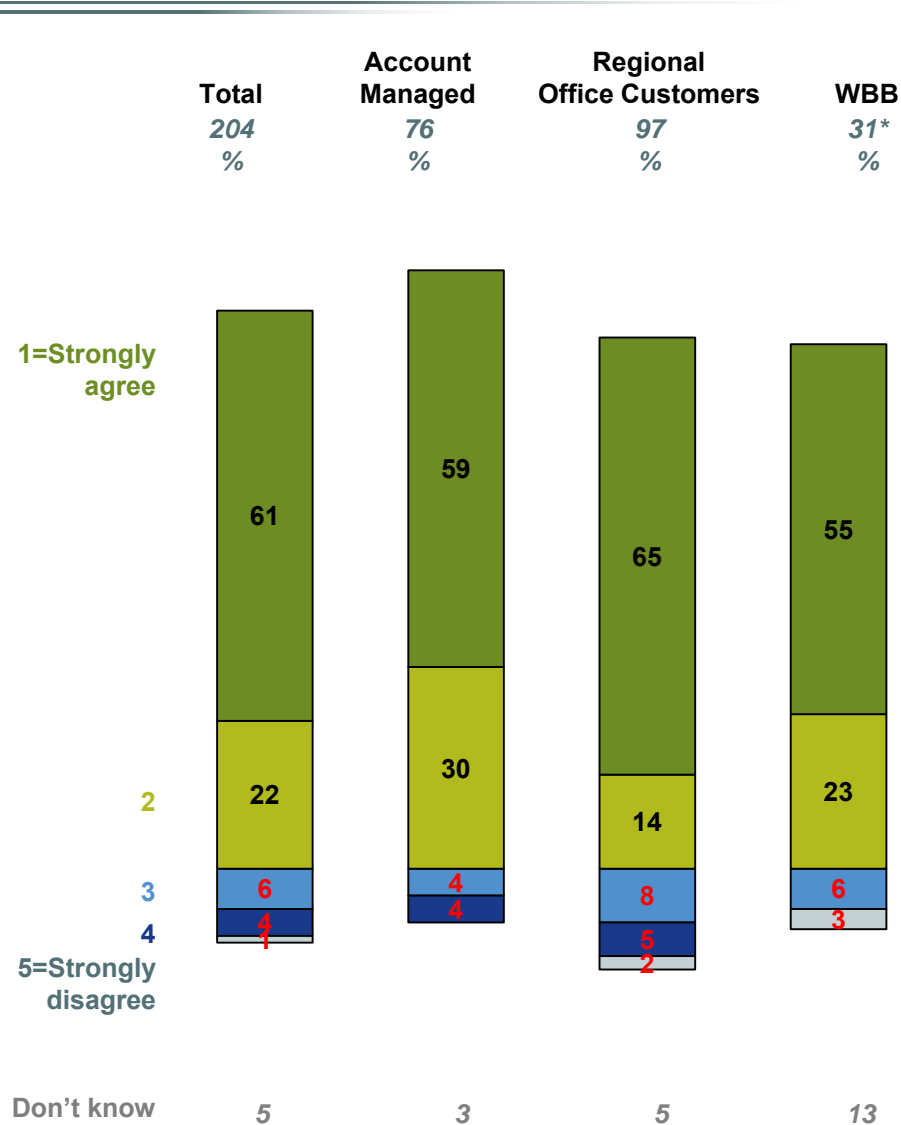
## PROCESS COMMUNICATION



# Key Performance Indicator – Process Communication

*‘Kept you informed of progress throughout the process’*

*\*Small Bases = less than 50*

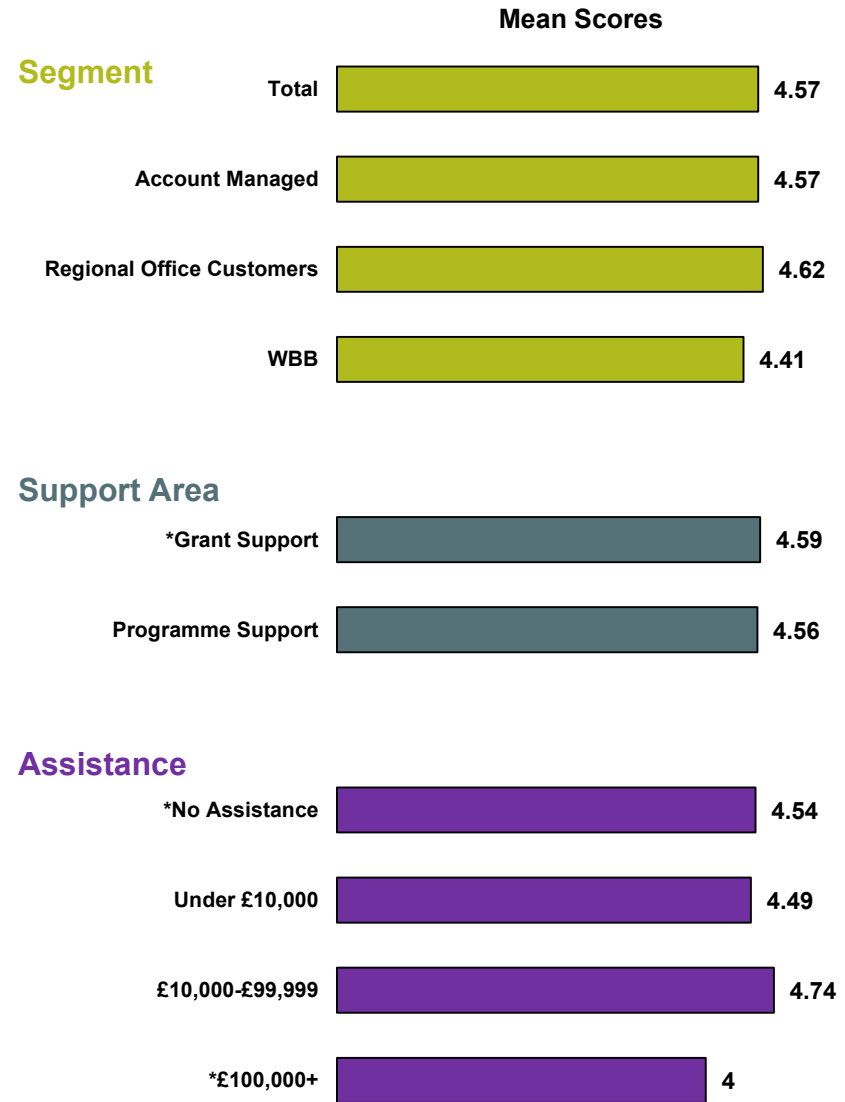
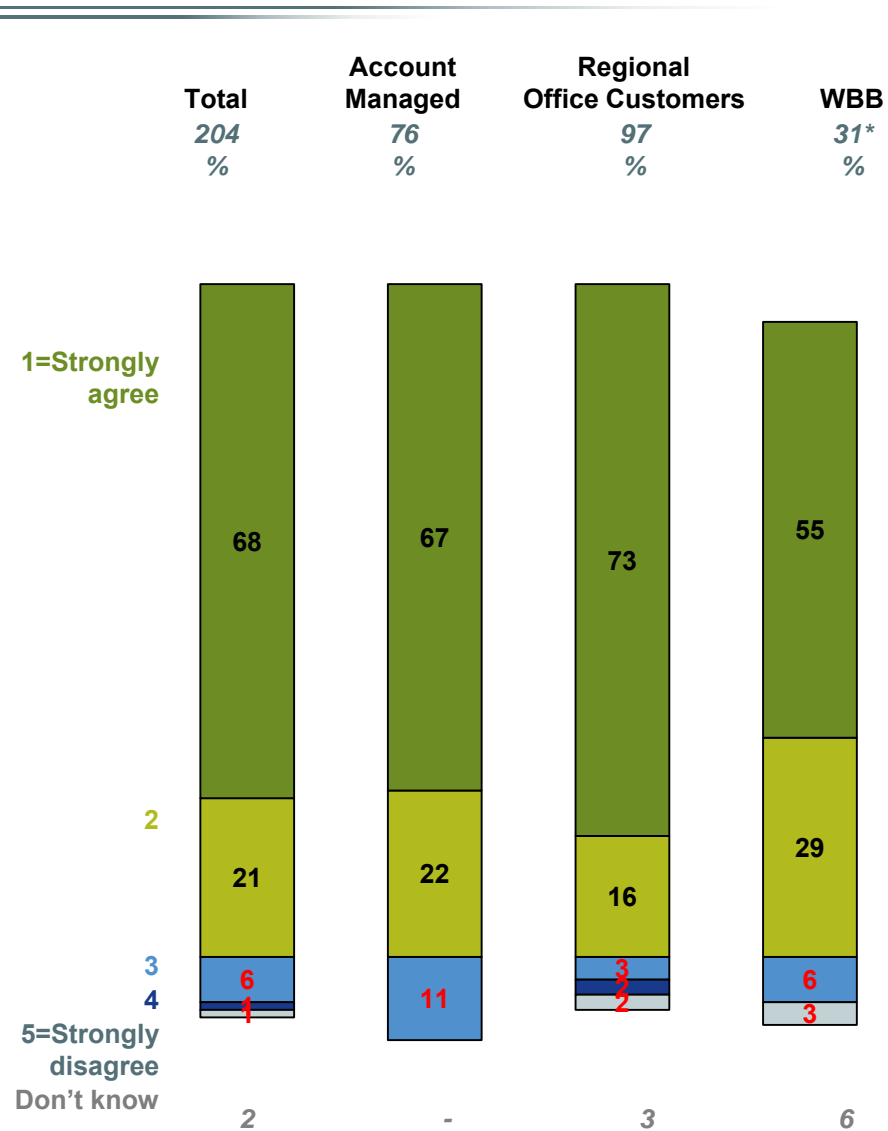


Using a scale from 1 to 5, where 1 means 'strongly agree' and 5 means 'strongly disagree', to what extent do you agree or disagree that Invest NI ...? [ Base: 204 Jan'19-Mar'19 (76 Account Managed, 97 Regional Office Customers and 31\* WBB) ]

# Key Performance Indicator – Process Communication

*'Responded to your queries within a reasonable timeframe'*

*\*Small Bases = less than 50*



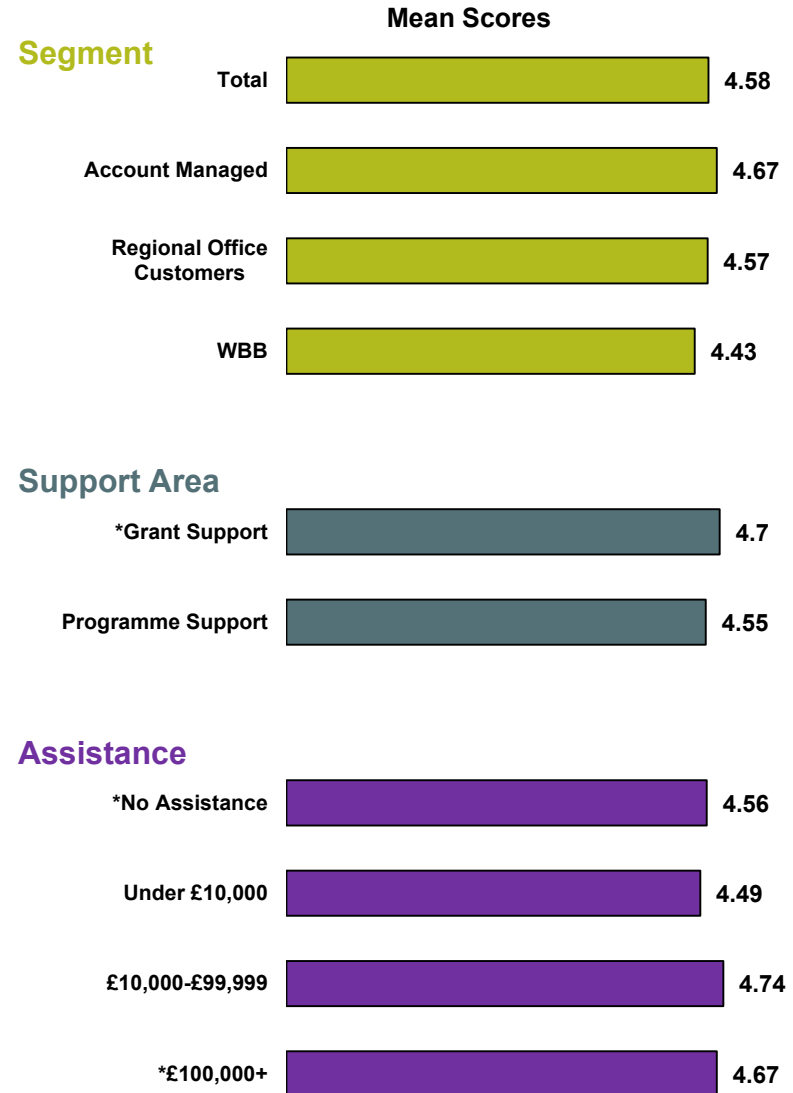
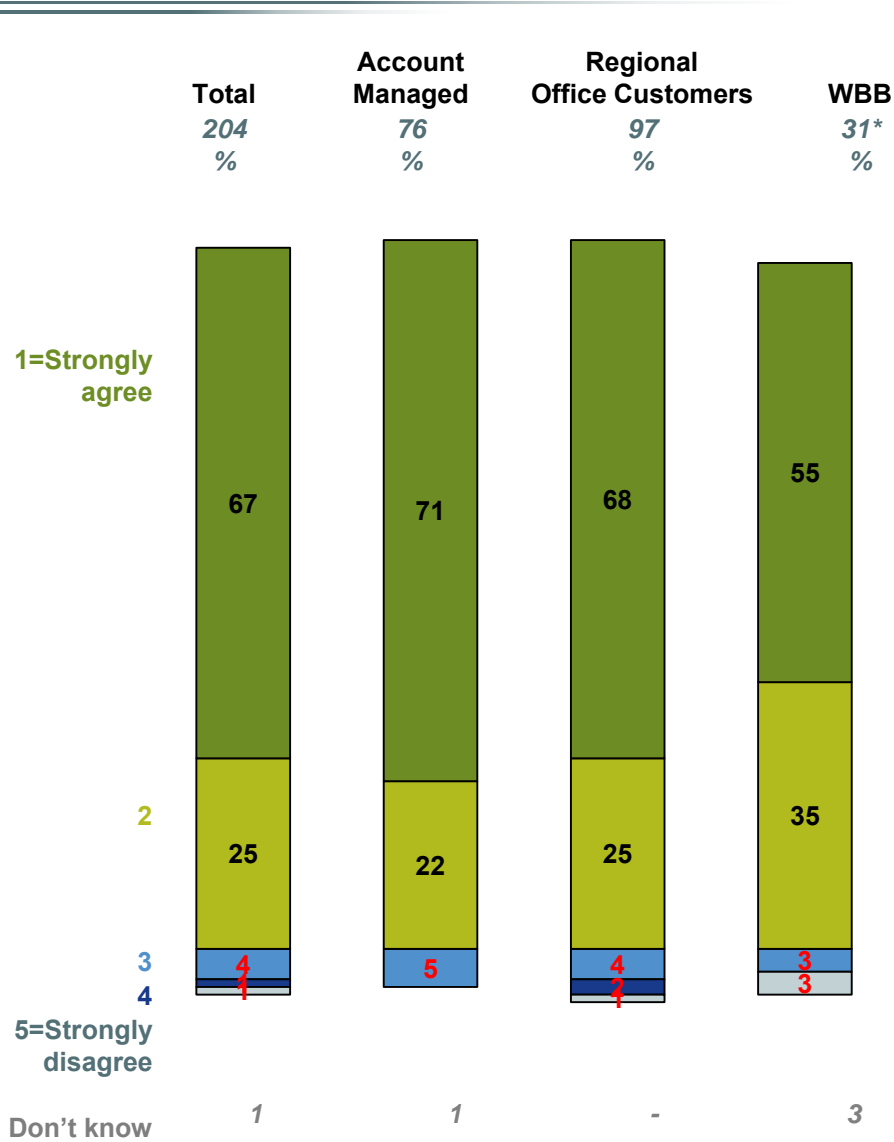
Using a scale from 1 to 5, where 1 means 'strongly agree' and 5 means 'strongly disagree', to what extent do you agree or disagree that Invest NI ...? [ Base: 204 Jan'19-Mar'19 (76 Account Managed, 97 Regional Office Customers and 31\* WBB) ]



# Key Performance Indicator – Process Communication

‘Used clear and effective communication’

\*Small Bases = less than 50



Using a scale from 1 to 5, where 1 means ‘strongly agree’ and 5 means ‘strongly disagree’, to what extent do you agree or disagree that Invest NI ...? [ Base: 204 Jan’19-Mar’19 (76 Account Managed, 97 Regional Office Customers and 31\* WBB) ]

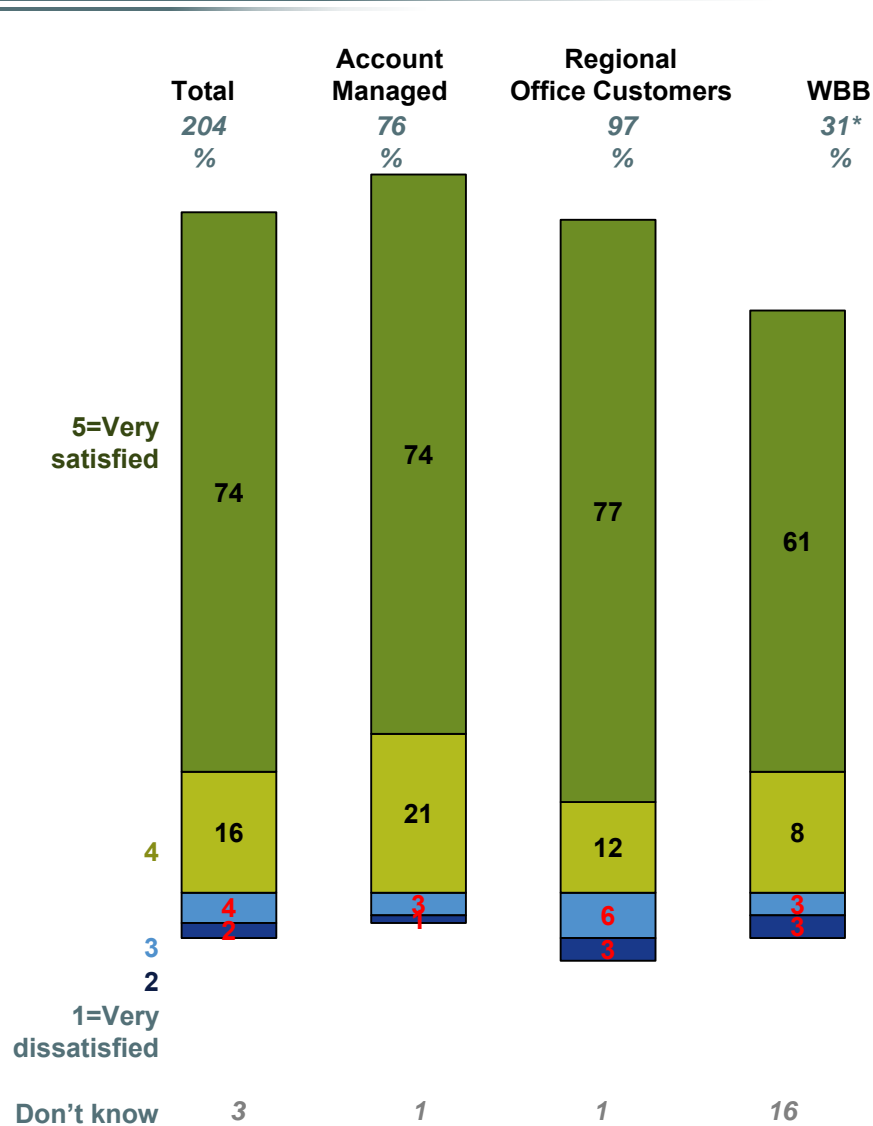
# PEOPLE



# Key Performance Indicator – People

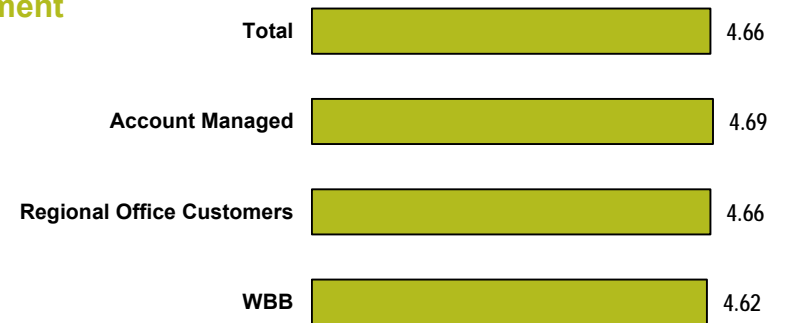
'Level of satisfaction with your Customer Executive/main Invest NI contact person'

\*Small Bases = less than 50



## Segment

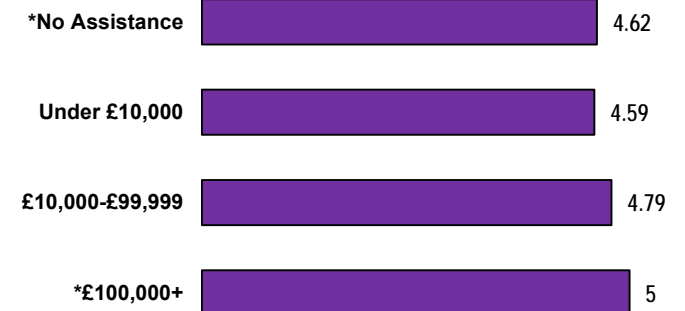
### Mean Scores



## Support Area



## Assistance

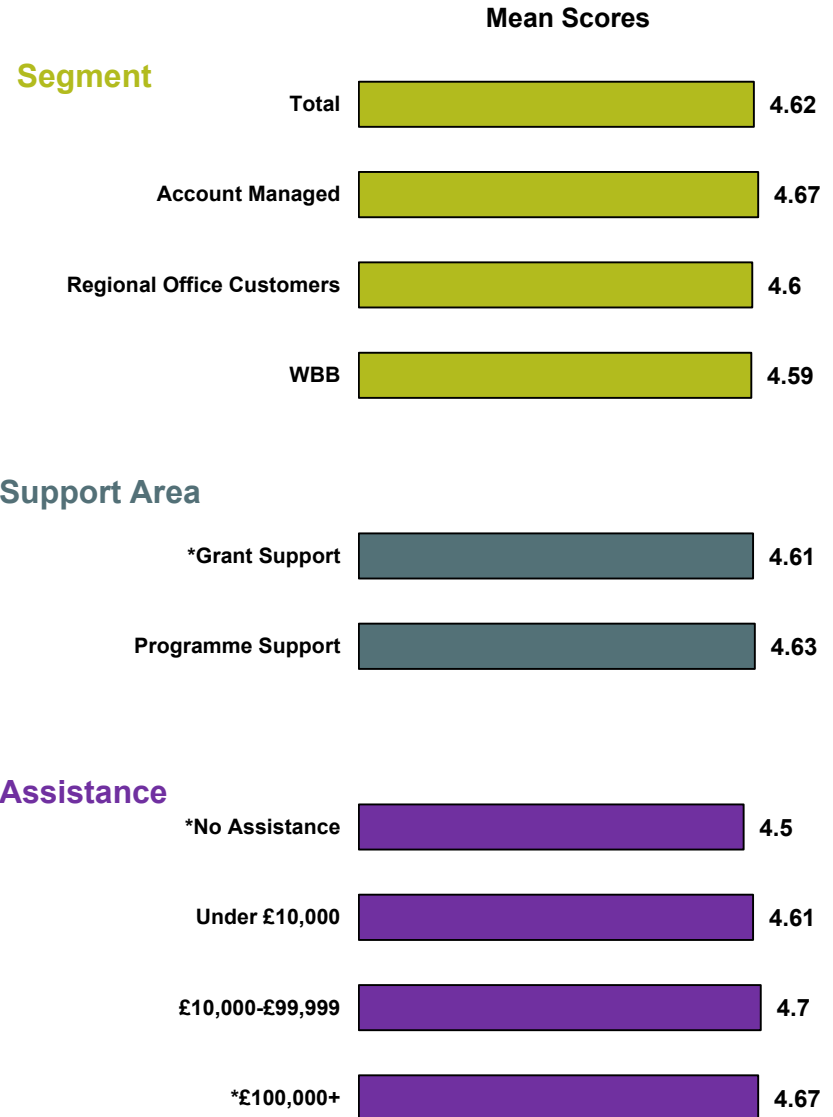
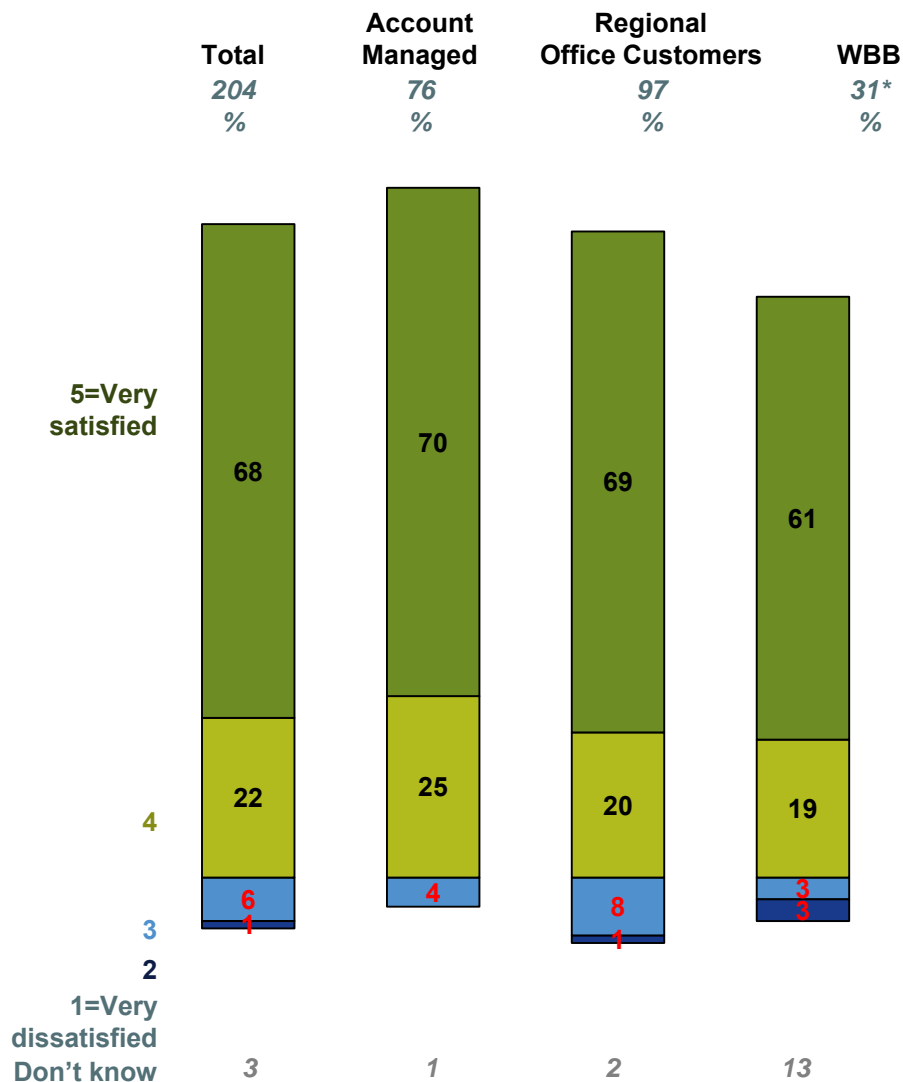


Using a scale from 1 to 5, where 1 means 'strongly agree' and 5 means 'strongly disagree', to what extent do you agree or disagree that Invest NI ...? [ Base: 204 Jan'19-Mar'19 (76 Account Managed, 97 Regional Office Customers and 31\* WBB) ]

# Key Performance Indicator – Process Communication

'Level of satisfaction that the team of people you worked with from Invest NI provided a seamless approach to your business during this engagement'

\*Small Bases = less than 50



Using a scale from 1 to 5, where 1 means 'strongly agree' and 5 means 'strongly disagree', to what extent do you agree or disagree that Invest NI ...? [ Base: 204 Jan'19-Mar'19 (76 Account Managed, 97 Regional Office Customers and 31\* WBB) ]

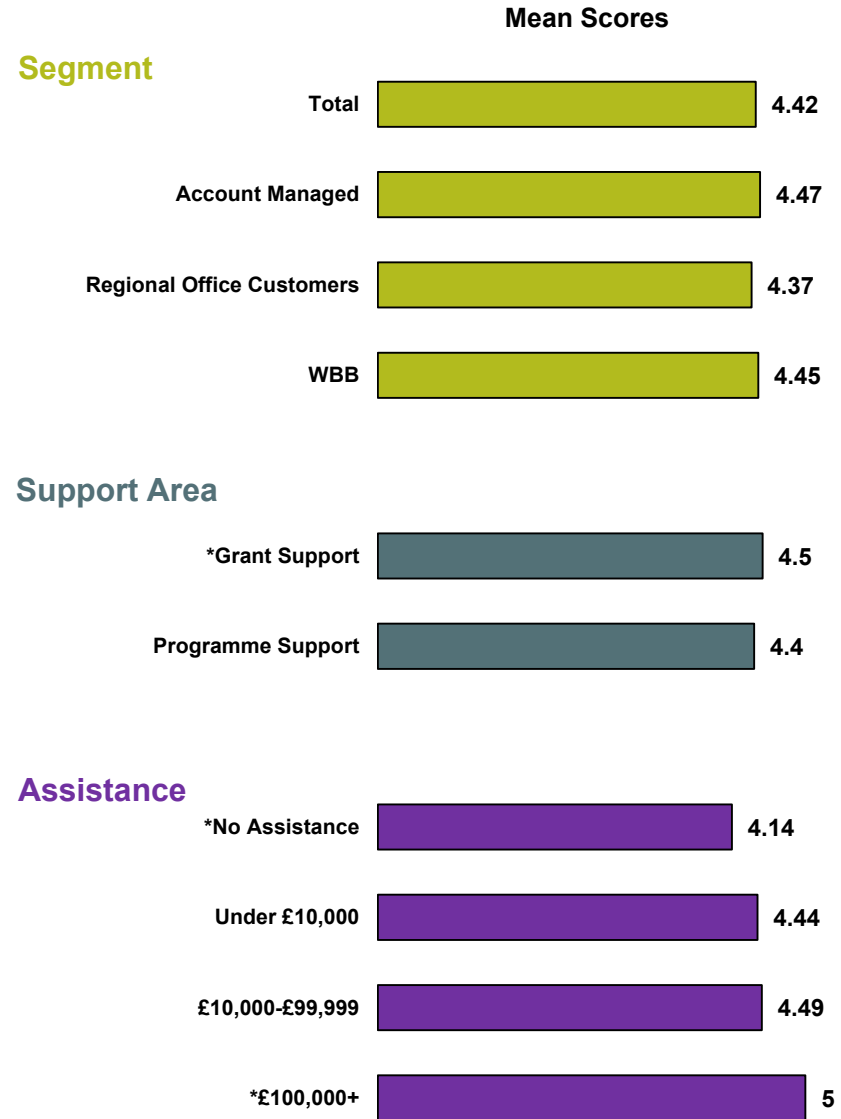
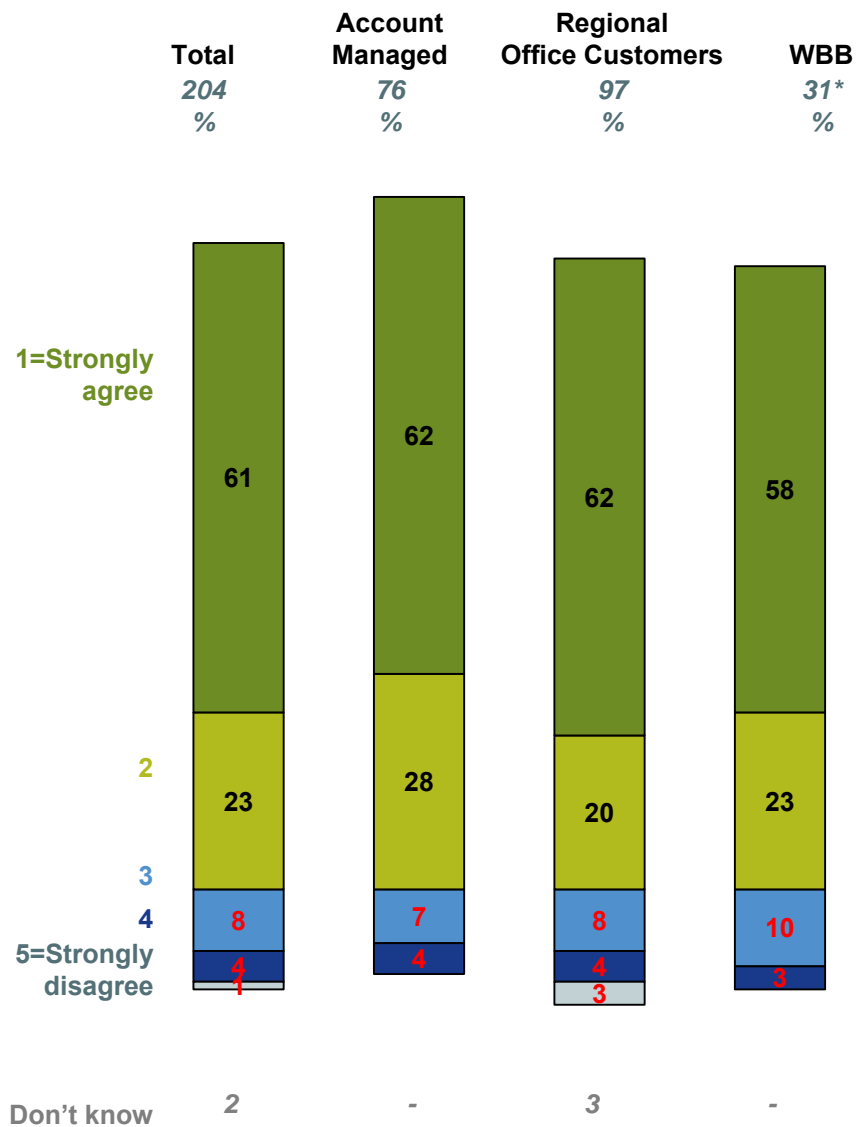
# PERFORMANCE



# Key Performance Indicator – Performance

‘The Invest NI team is helping to develop my business’

\*Small Bases = less than 50

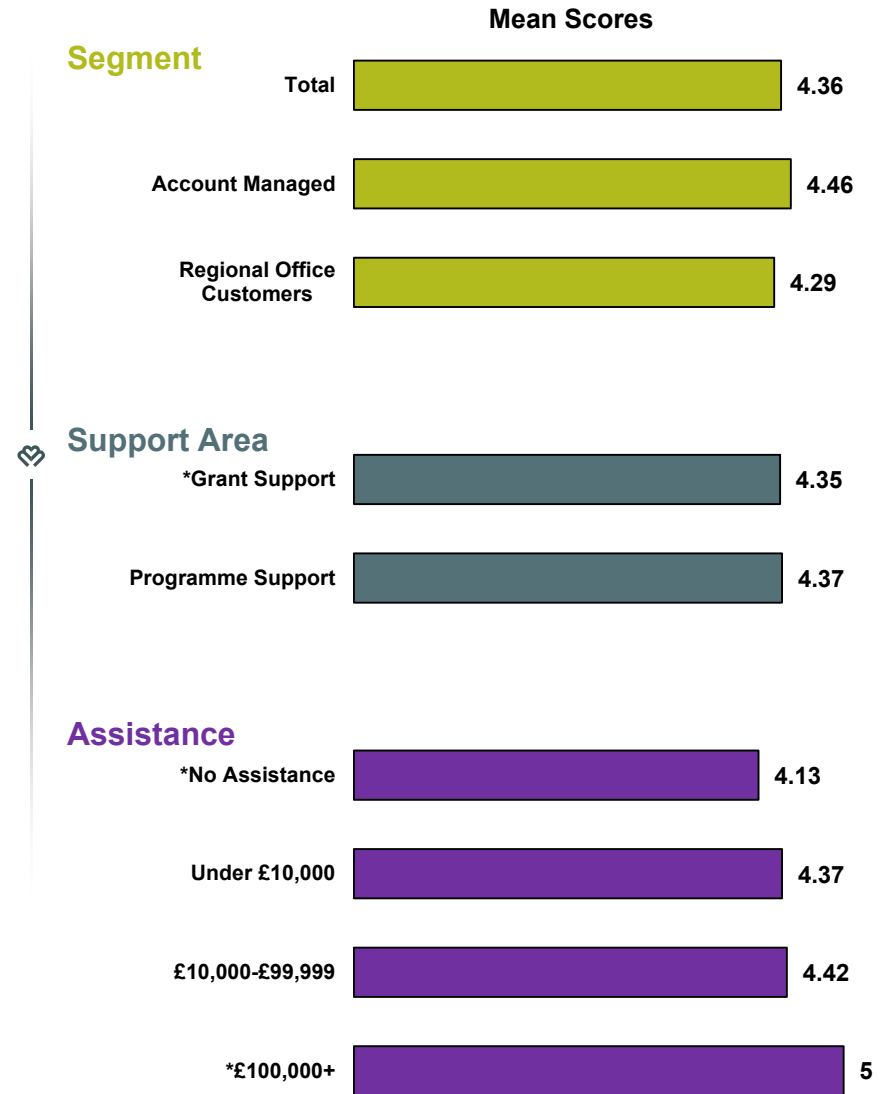
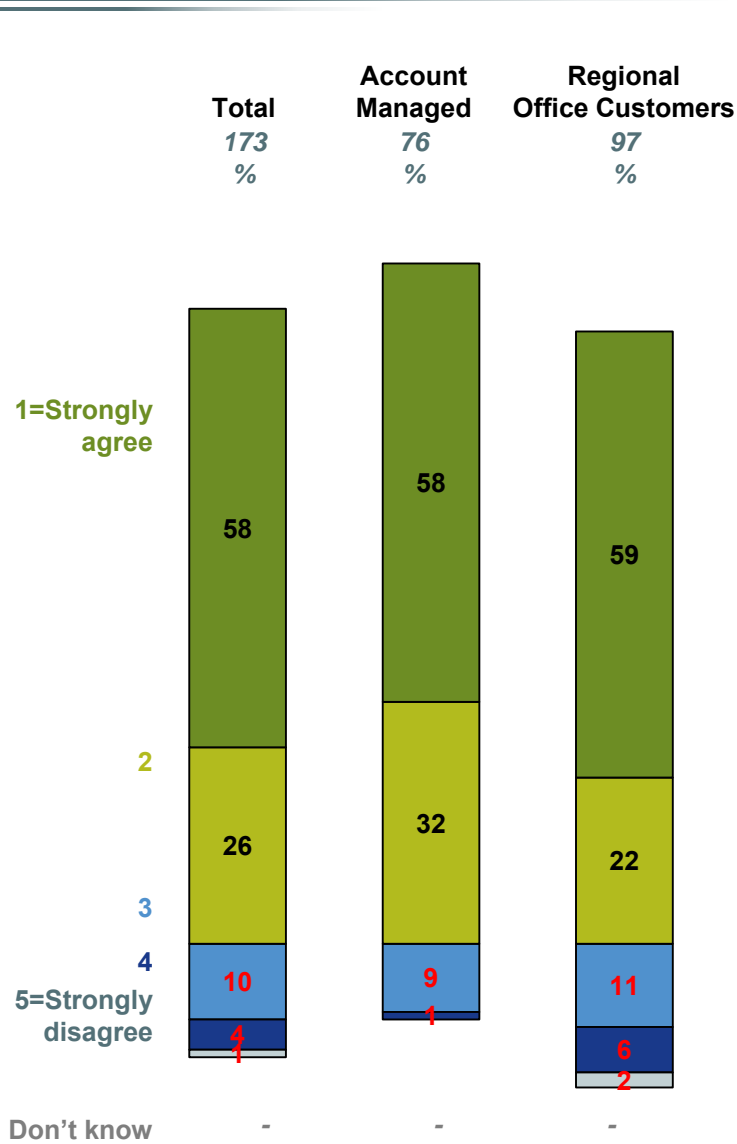


Using a scale from 1 to 5, where 1 means 'strongly agree' and 5 means 'strongly disagree', to what extent do you agree or disagree that Invest NI ...? [ Base: 204 Jan'19-Mar'19 (76 Account Managed, 97 Regional Office Customers and 31\* WBB) ]

# Key Performance Indicator – Performance

'I view Invest NI as a strategic partner supporting my business'

\*Small Bases = less than 50

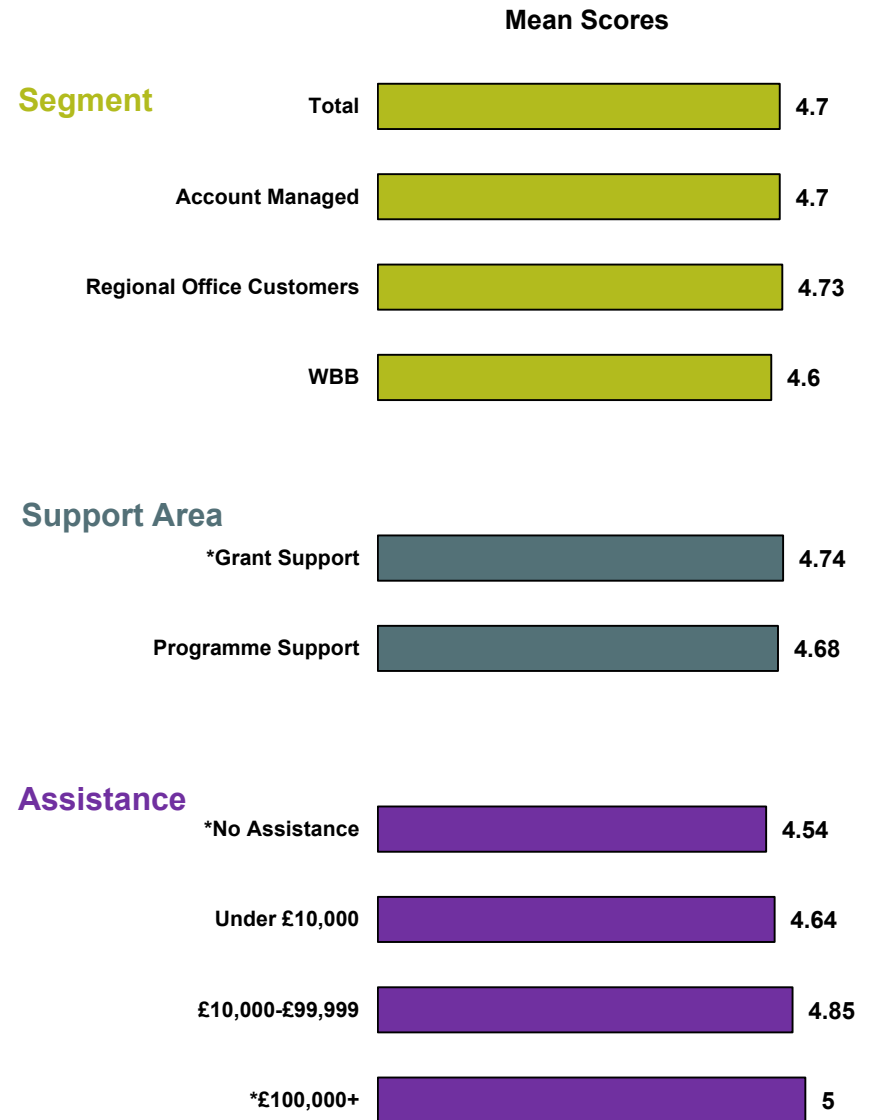
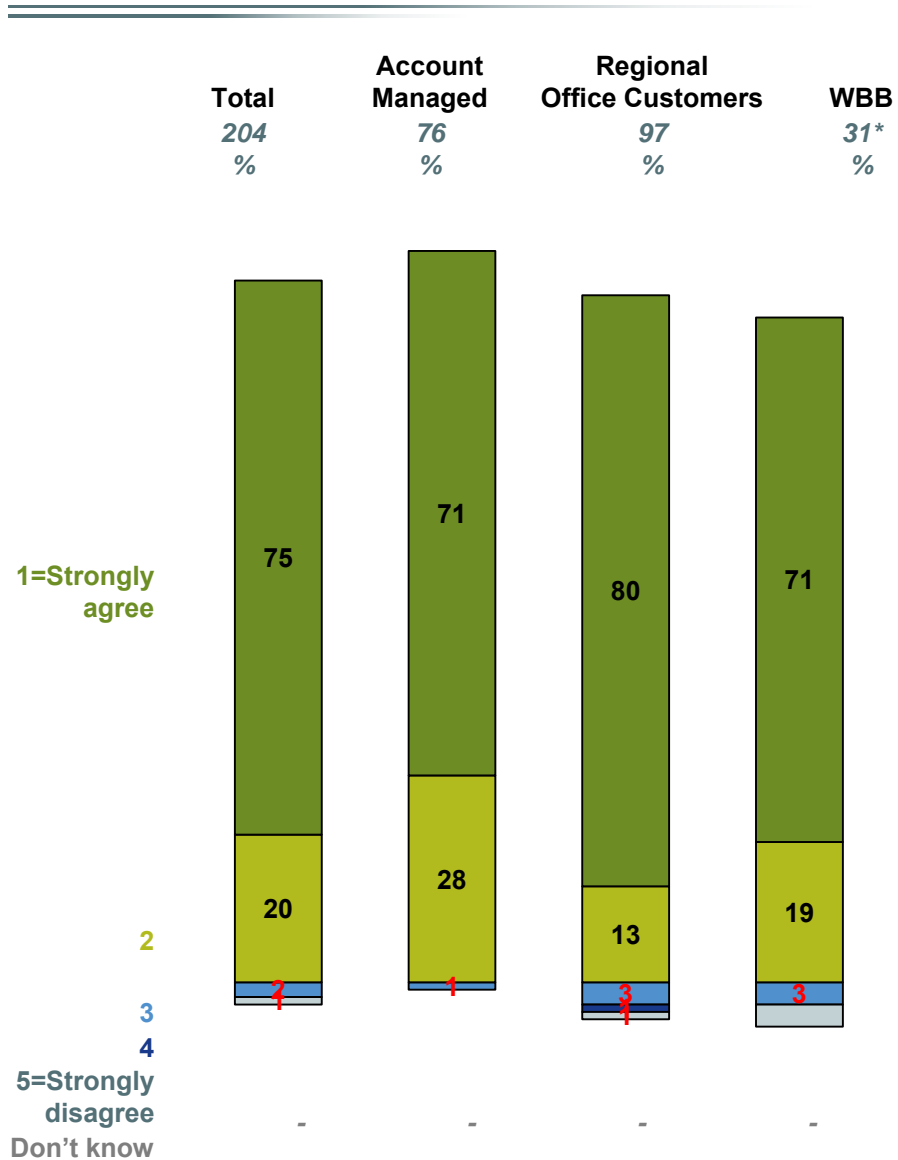


Using a scale from 1 to 5, where 1 means 'strongly agree' and 5 means 'strongly disagree', to what extent do you agree or disagree that Invest NI ...? [Base: 173 Jan'19-Mar'19 (76 Account Managed and 97 Regional Office Customers)]

# Key Performance Indicator – Performance

*‘Invest NI acts with professionalism and integrity’*

*\*Small Bases = less than 50*



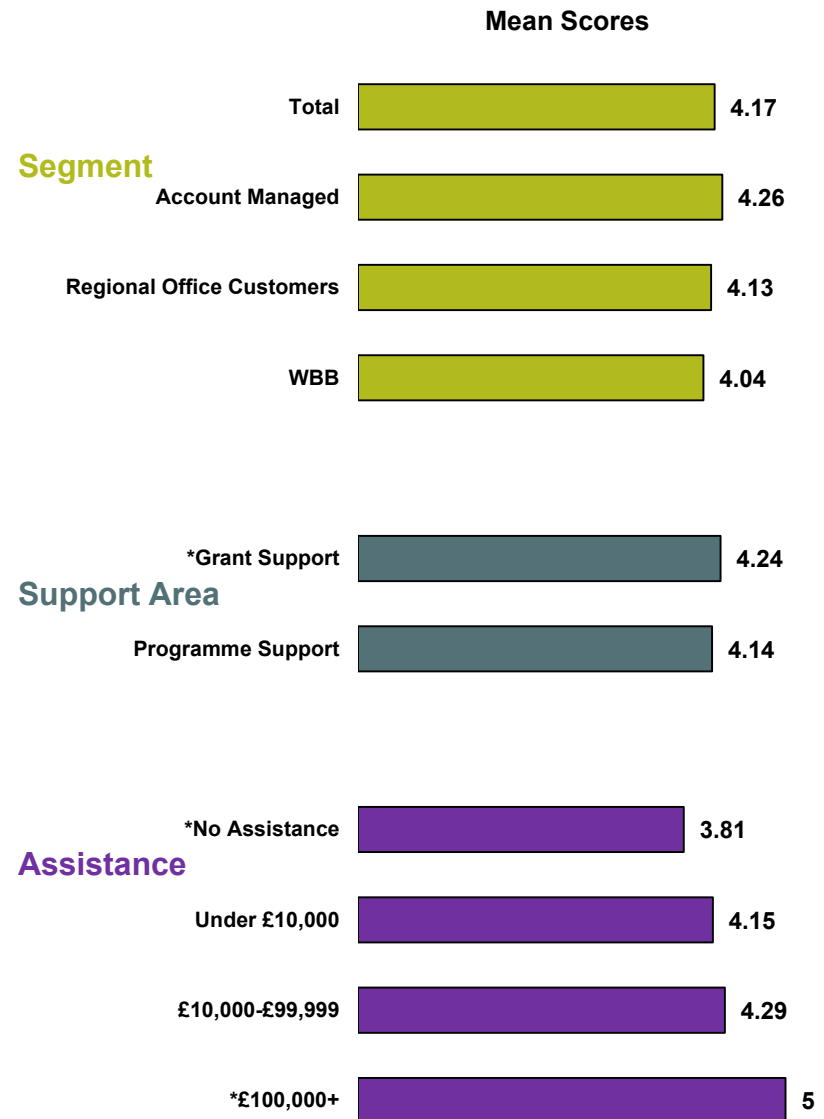
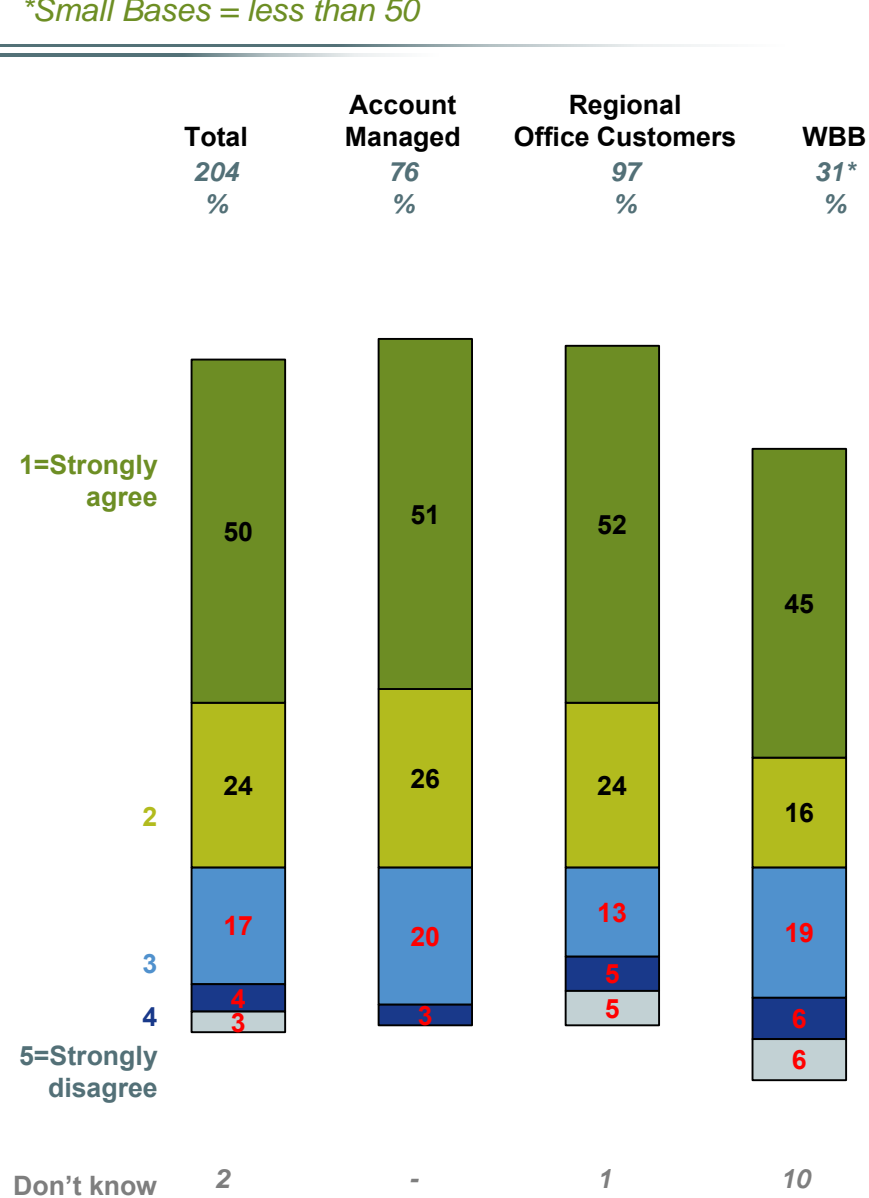
Using a scale from 1 to 5, where 1 means 'strongly agree' and 5 means 'strongly disagree', to what extent do you agree or disagree that Invest NI ...? [ Base: 204 Jan'19-Mar'19 (76 Account Managed, 97 Regional Office Customers and 31\* WBB) ]



# Key Performance Indicator – Performance

*'Invest NI exceeded my expectations'*

\*Small Bases = less than 50

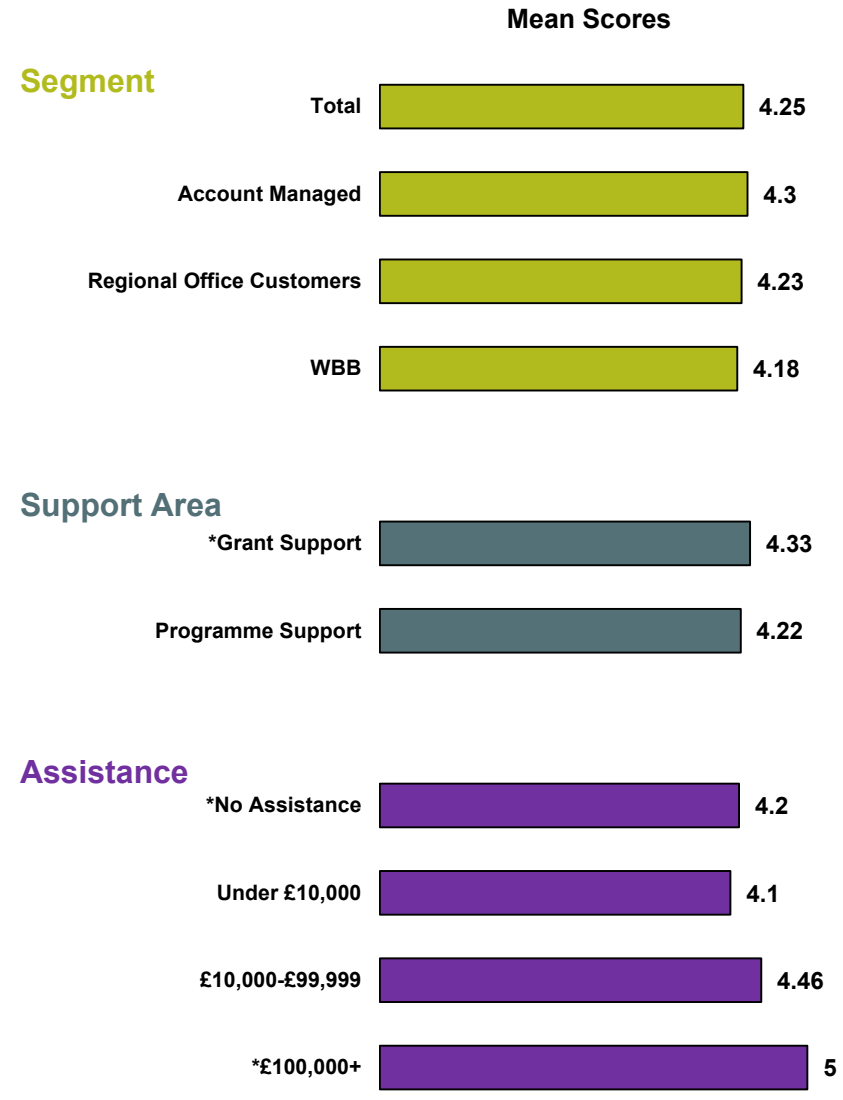
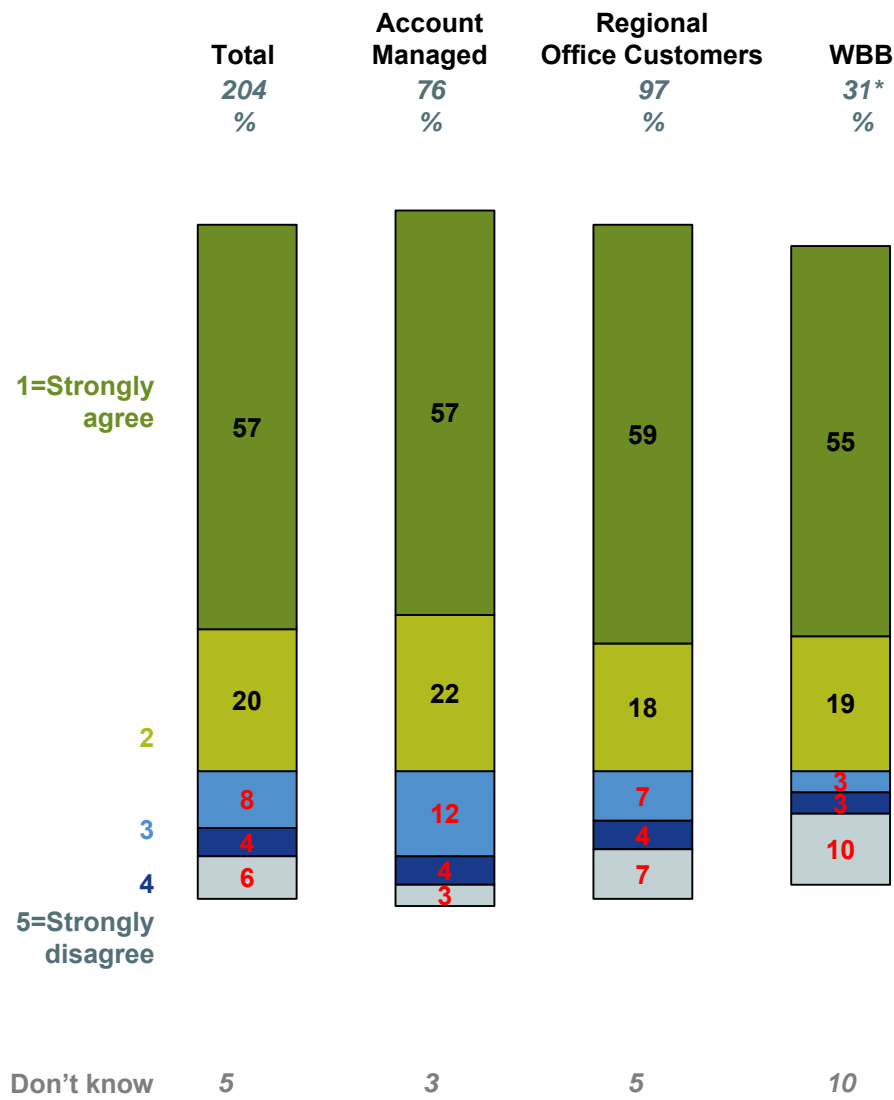


Using a scale from 1 to 5, where 1 means 'strongly agree' and 5 means 'strongly disagree', to what extent do you agree or disagree that Invest NI ...? [ Base: 204 Jan'19-Mar'19 (76 Account Managed, 97 Regional Office Customers and 31\* WBB) ]

# Key Performance Indicator – Performance

'I received information on additional support programmes that are available from Invest NI'

\*Small Bases = less than 50

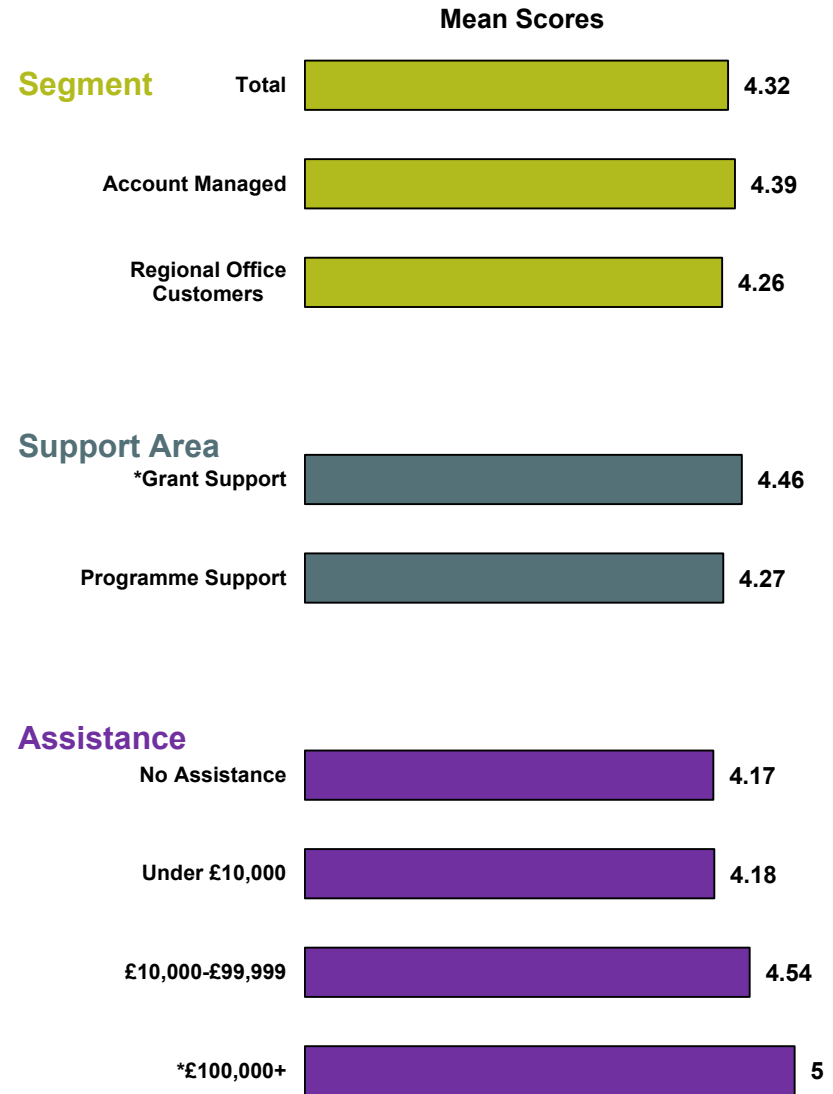
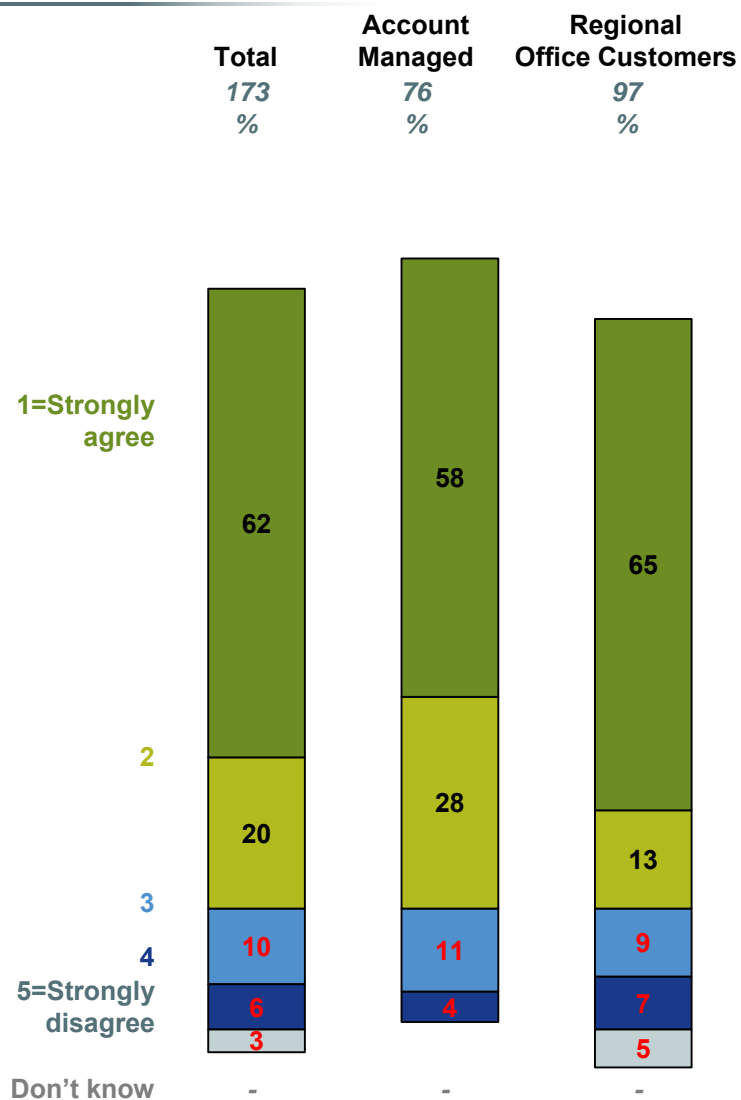


Using a scale from 1 to 5, where 1 means 'strongly agree' and 5 means 'strongly disagree', to what extent do you agree or disagree that Invest NI ...? [ Base: 204 Jan'19-Mar'19 (76 Account Managed, 97 Regional Office Customers and 31\* WBB) ]

# Key Performance Indicator – Performance

*'I am clear on my business development journey with Invest NI in terms of future support services that I am considering using'*

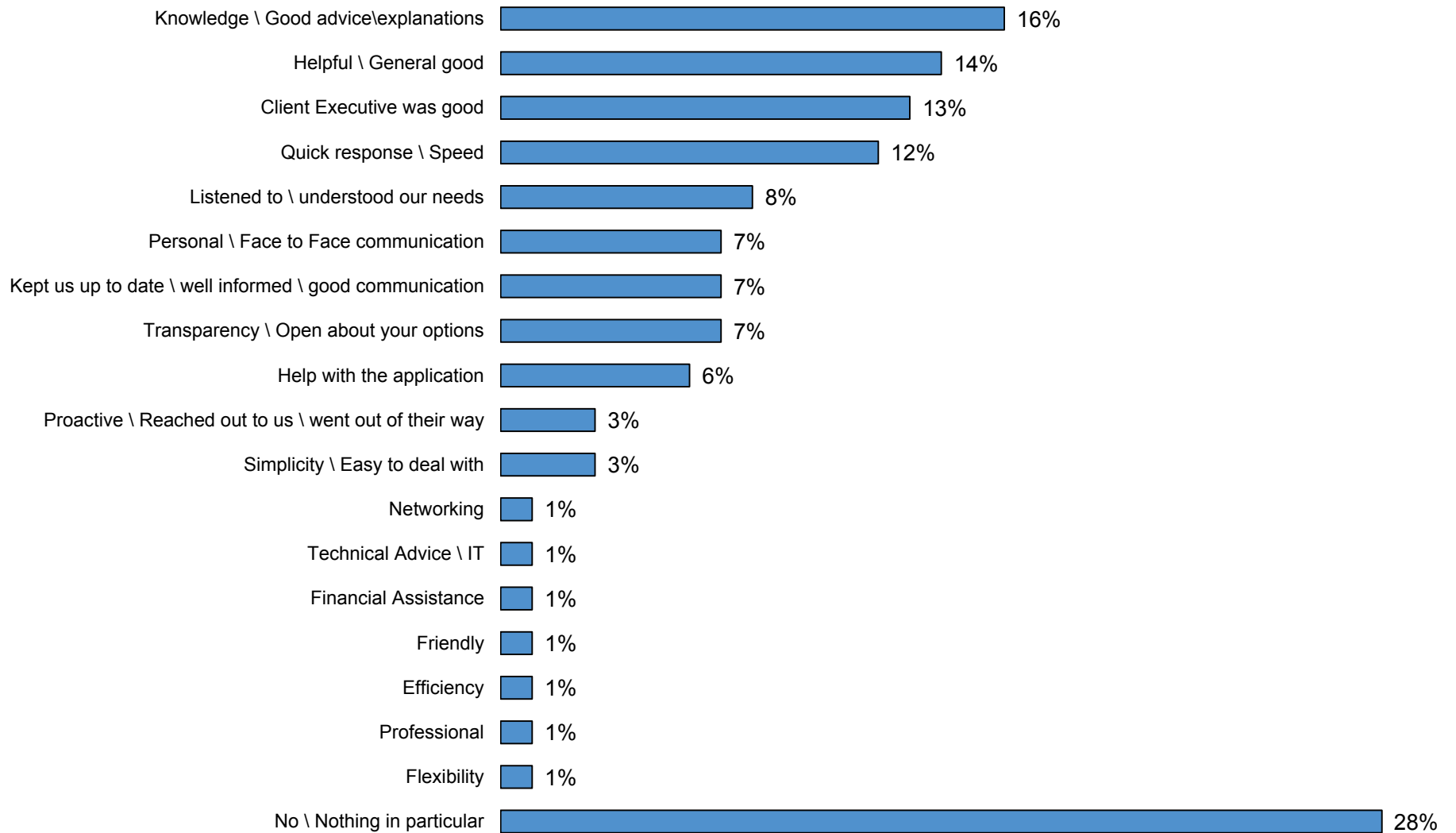
*\*Small Bases = less than 50*



Using a scale from 1 to 5, where 1 means 'strongly agree' and 5 means 'strongly disagree', to what extent do you agree or disagree that Invest NI ...? [Base: 173 Jan'19-Mar'19 (76 Account Managed and 97 Regional Office Customers) ]

# Key Performance Indicator – Performance

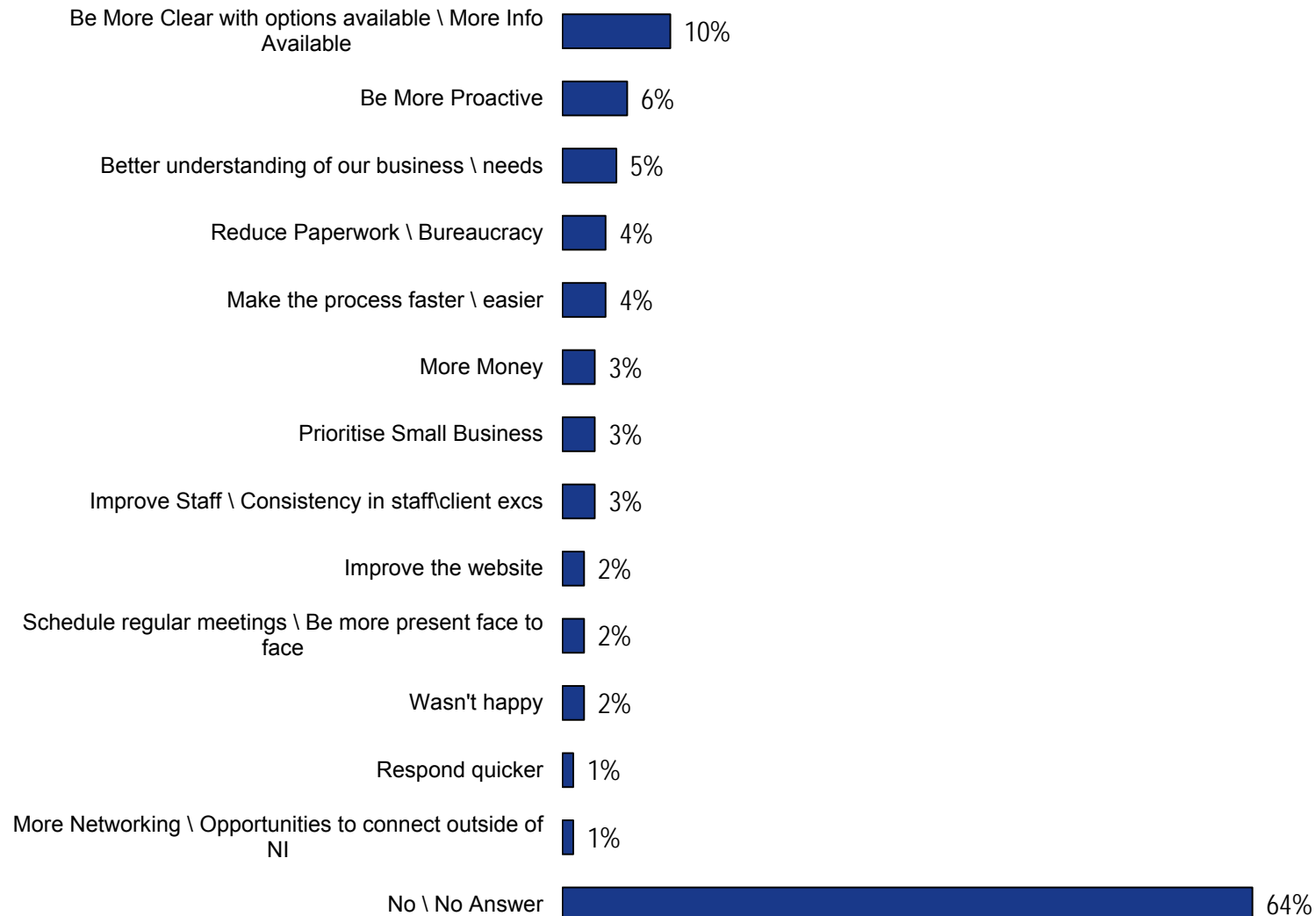
## *‘What Invest NI did particularly well’*



Is there anything that you think Invest NI did particularly well in the lead up to your offer of assistance?  
 [ Base: 204 Jan'19-Mar'19 (76 Account Managed, 97 Regional Office Customers and 31\* WBB) ]

# Key Performance Indicator – Performance

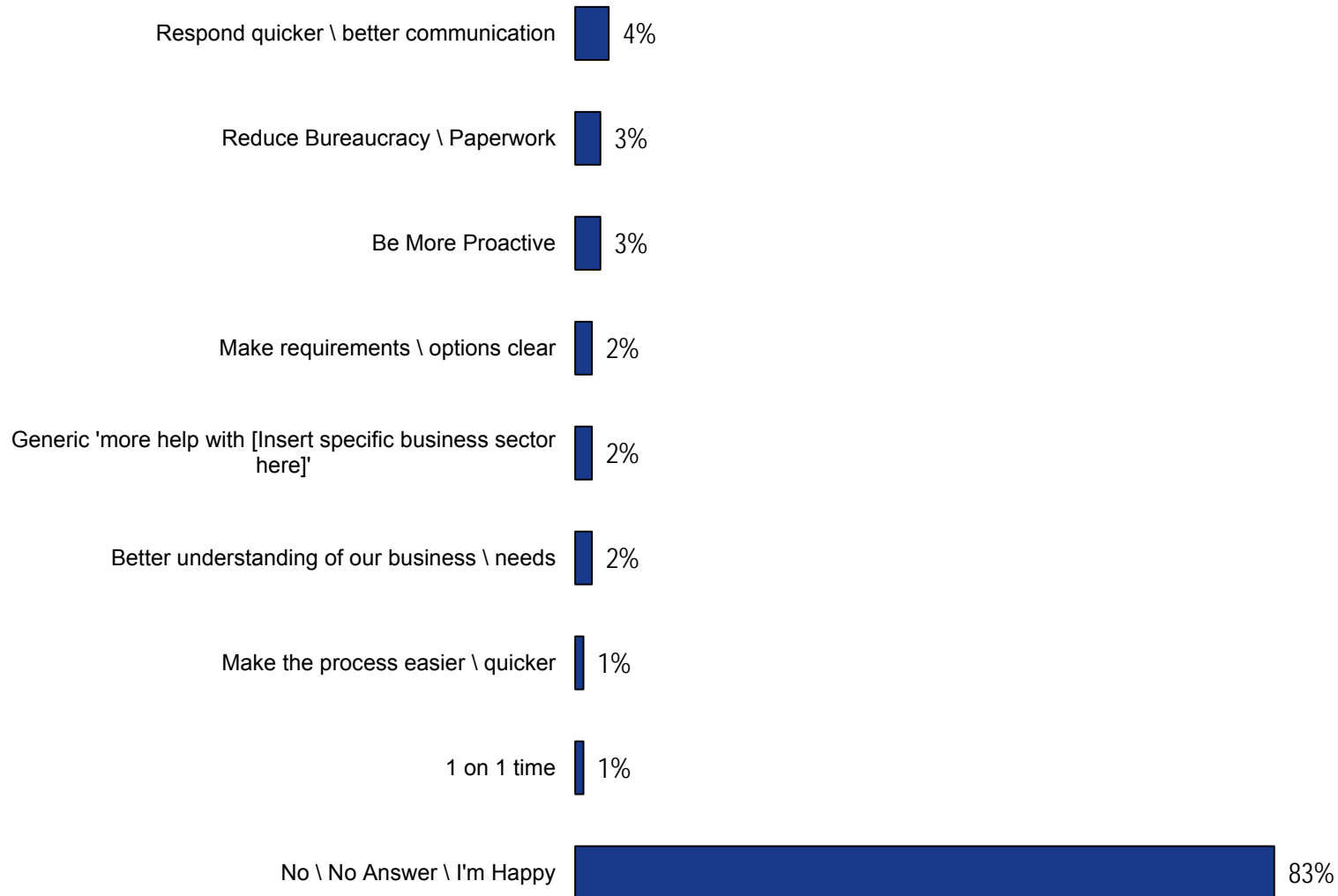
*‘Anything organisation could do to improve the overall service they provide’*



Thinking about your recent personal experience of Invest NI is there anything you think the organisation could do to improve the overall service they provide? [ Base: 204 Jan'19-Mar'19 (76 Account Managed, 97 Regional Office Customers and 31\* WBB) ]

# Key Performance Indicator – Performance

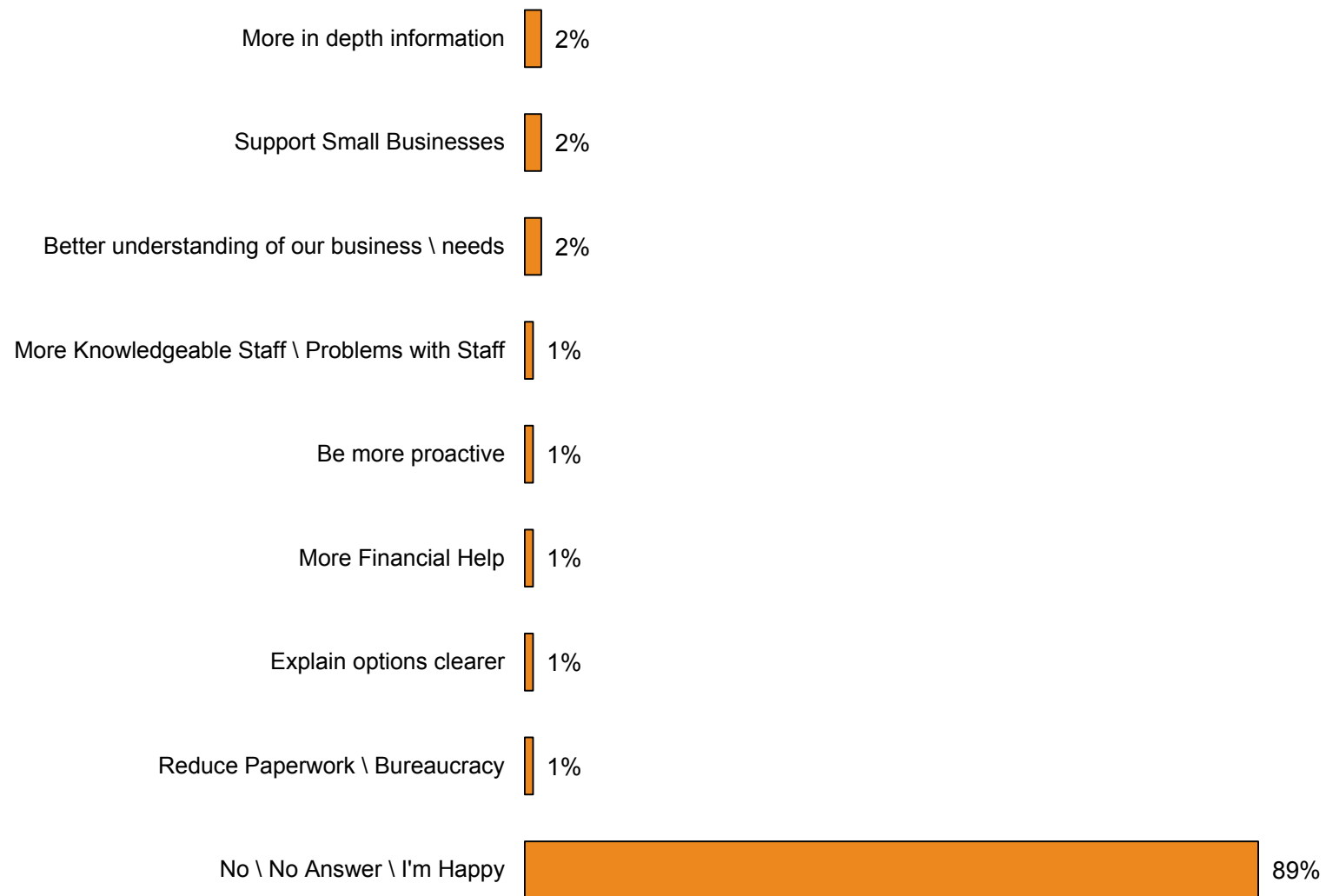
*‘Anything organisation could have done better’*



Thinking about your recent personal experience of Invest NI is there anything you think the organisation could have done better?  
[ Base: 204 Jan'19-Mar'19 (76 Account Managed, 97 Regional Office Customers and 31\* WBB) ]

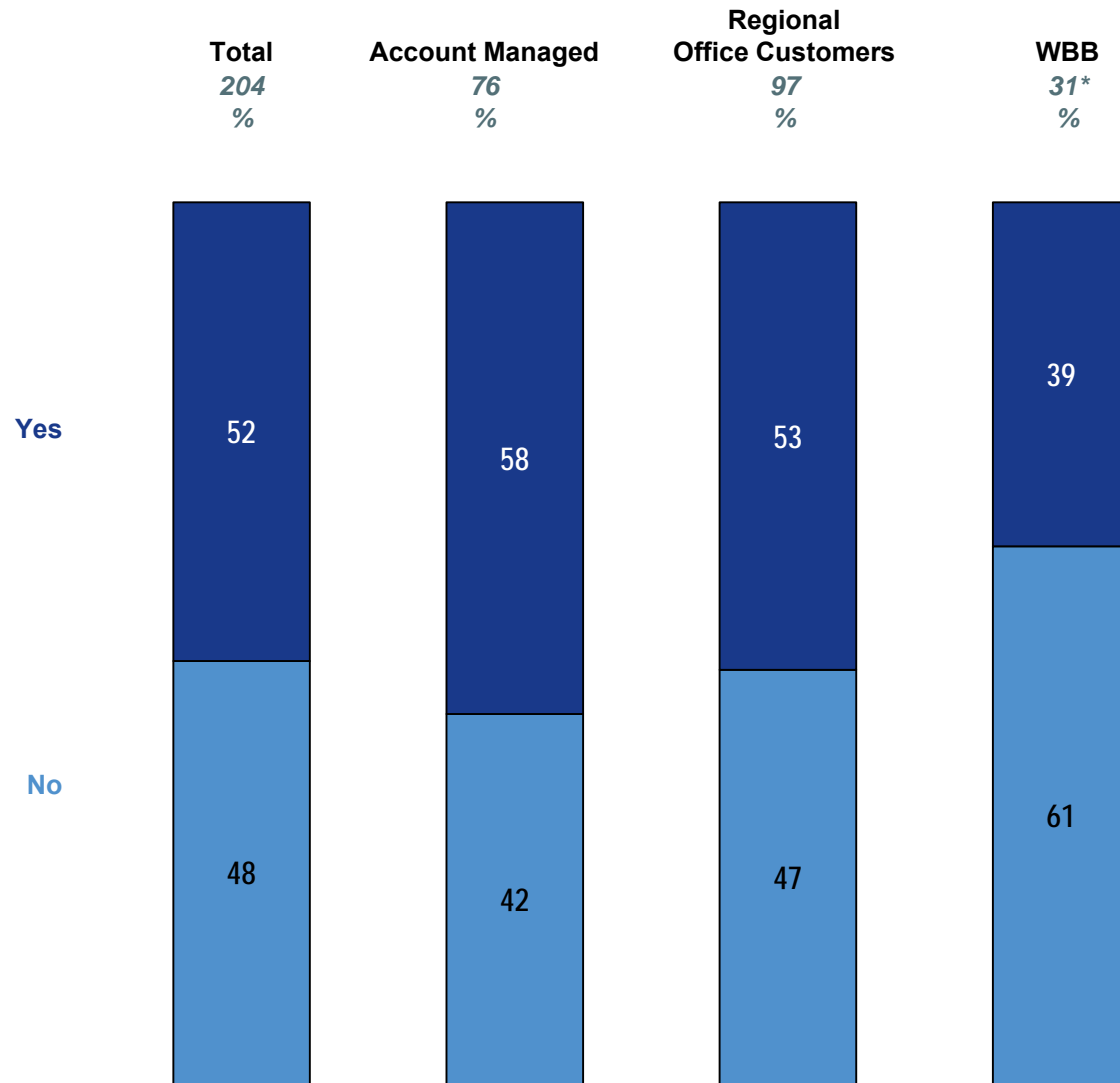
## Key Performance Indicator – Performance

*‘Anything organisation could have done differently’*



Thinking about your recent personal experience of Invest NI is there anything you think the organisation could have done differently?  
[ Base: 204 Jan'19-Mar'19 (76 Account Managed, 97 Regional Office Customers and 31\* WBB) ]

# Actively Discussing Application for Additional Support



Are you actively discussing an application for additional support services at present?  
 [ Base: 204 Jan'19-Mar'19 (76 Account Managed, 97 Regional Office Customers and 31\* WBB) ]

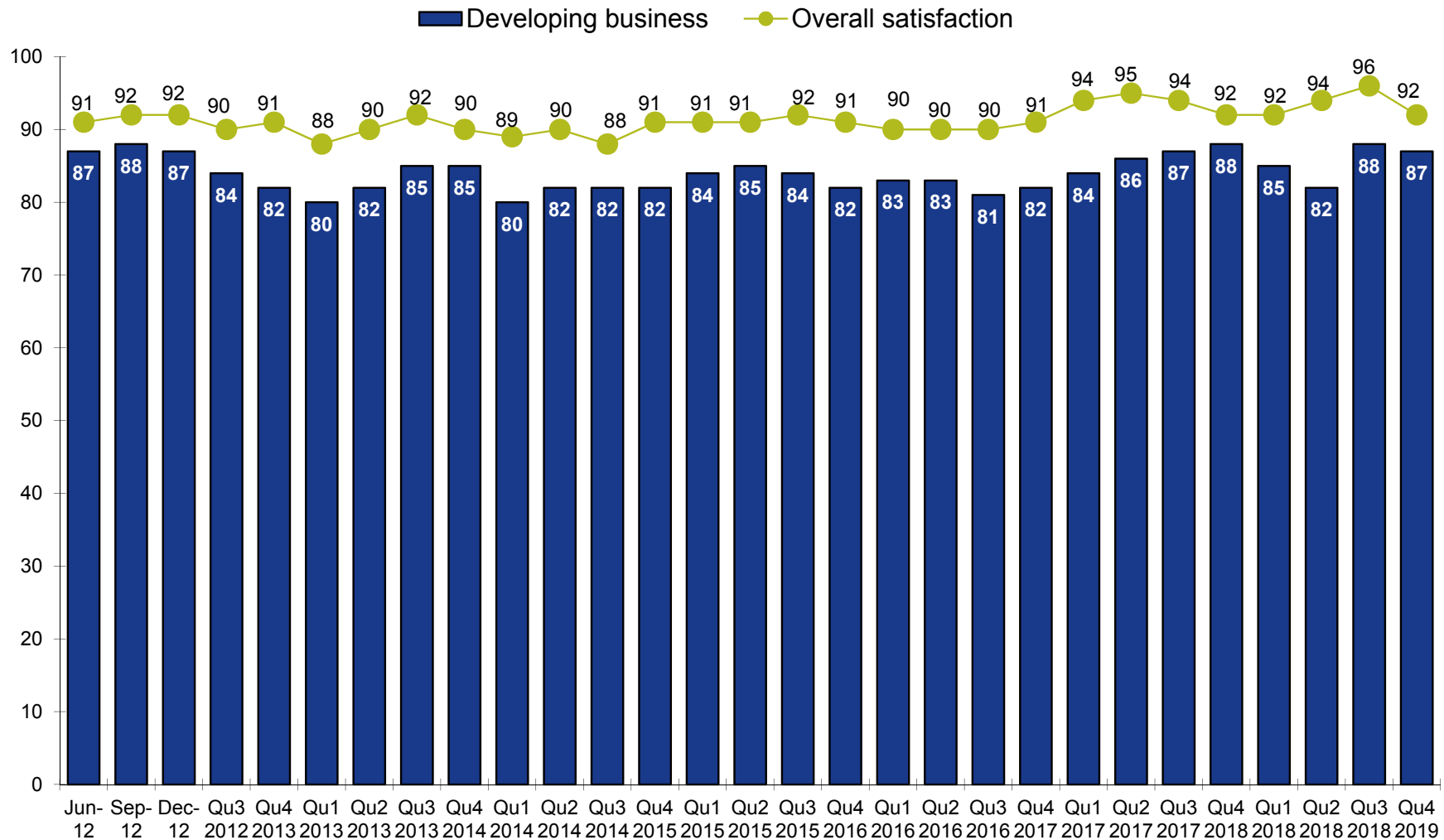


## ROLLING AVERAGES



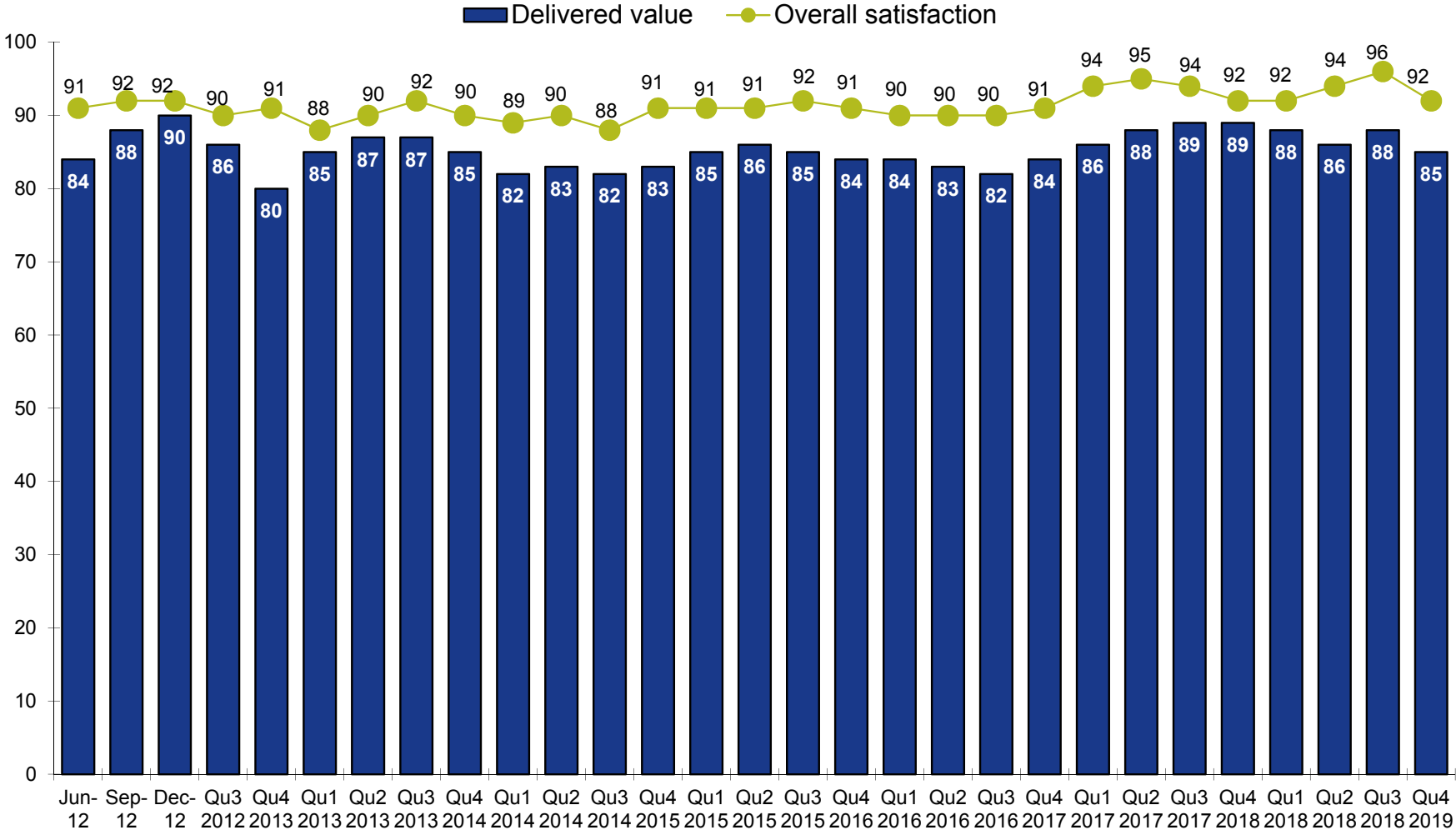
# Satisfaction and key driver variables: INI is helping to develop my business

Six month rolling average

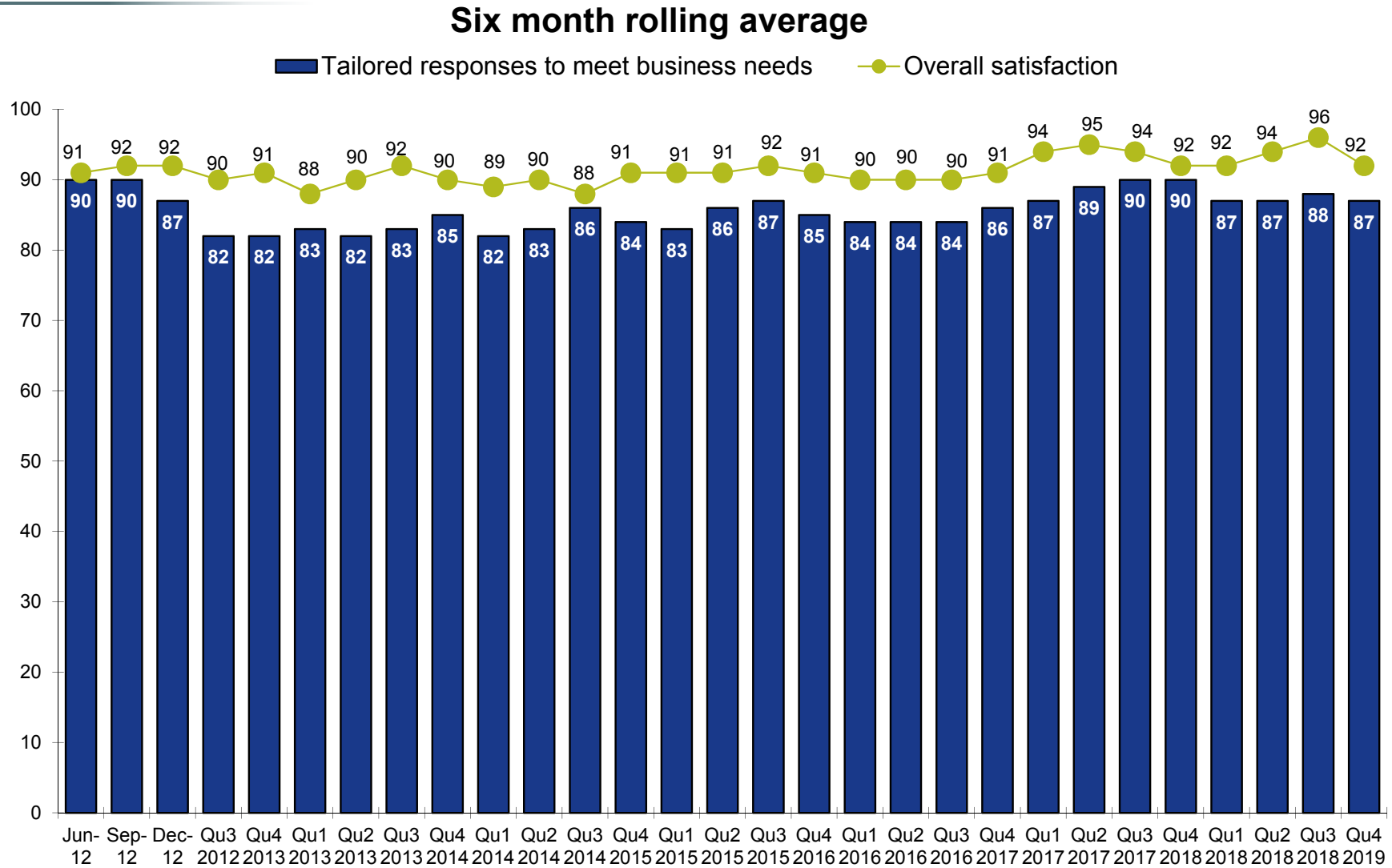


# Satisfaction and key driver variables: INI delivered value to my business

Six month rolling average



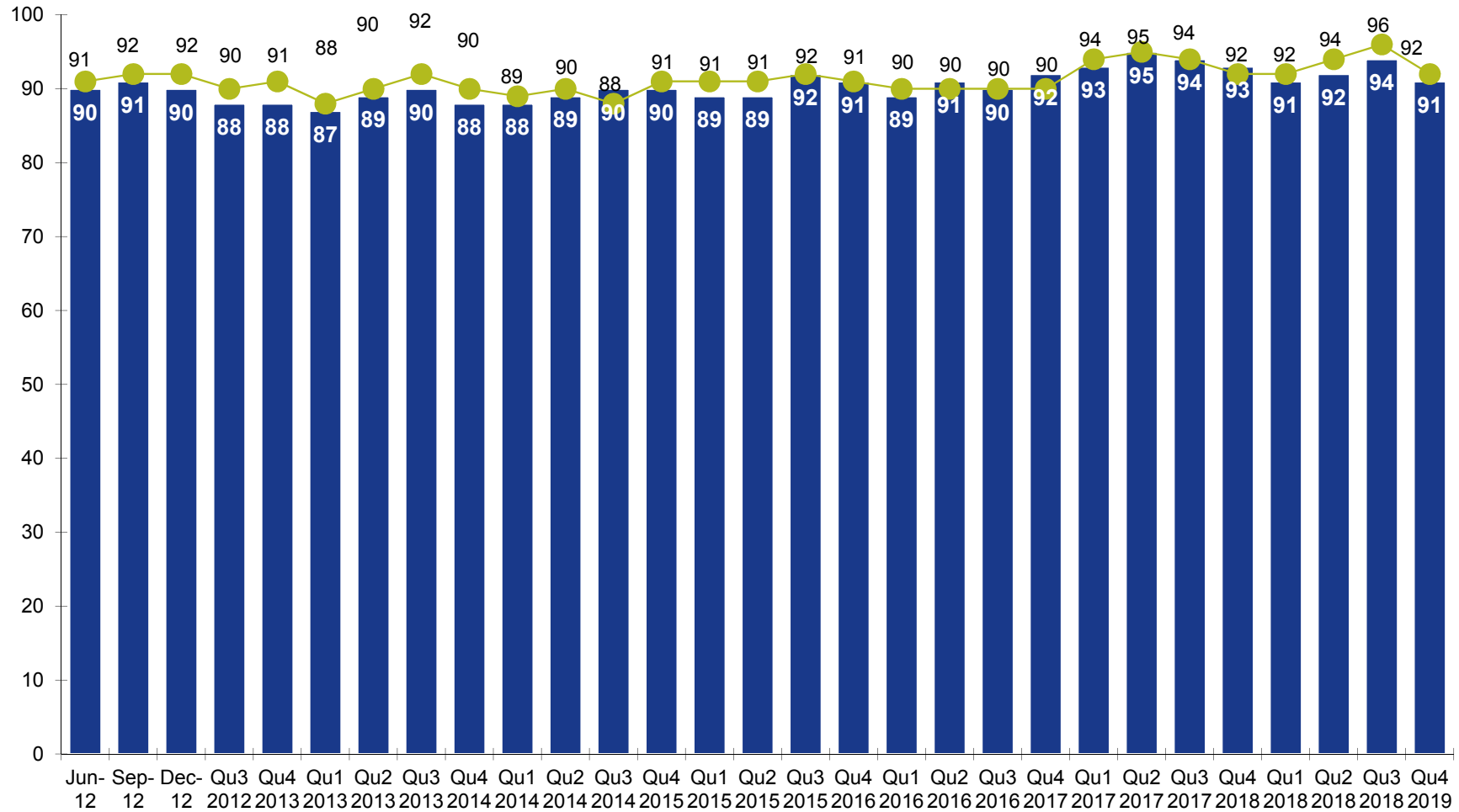
# Satisfaction and key driver variables: INI tailored their responses to meet your business needs



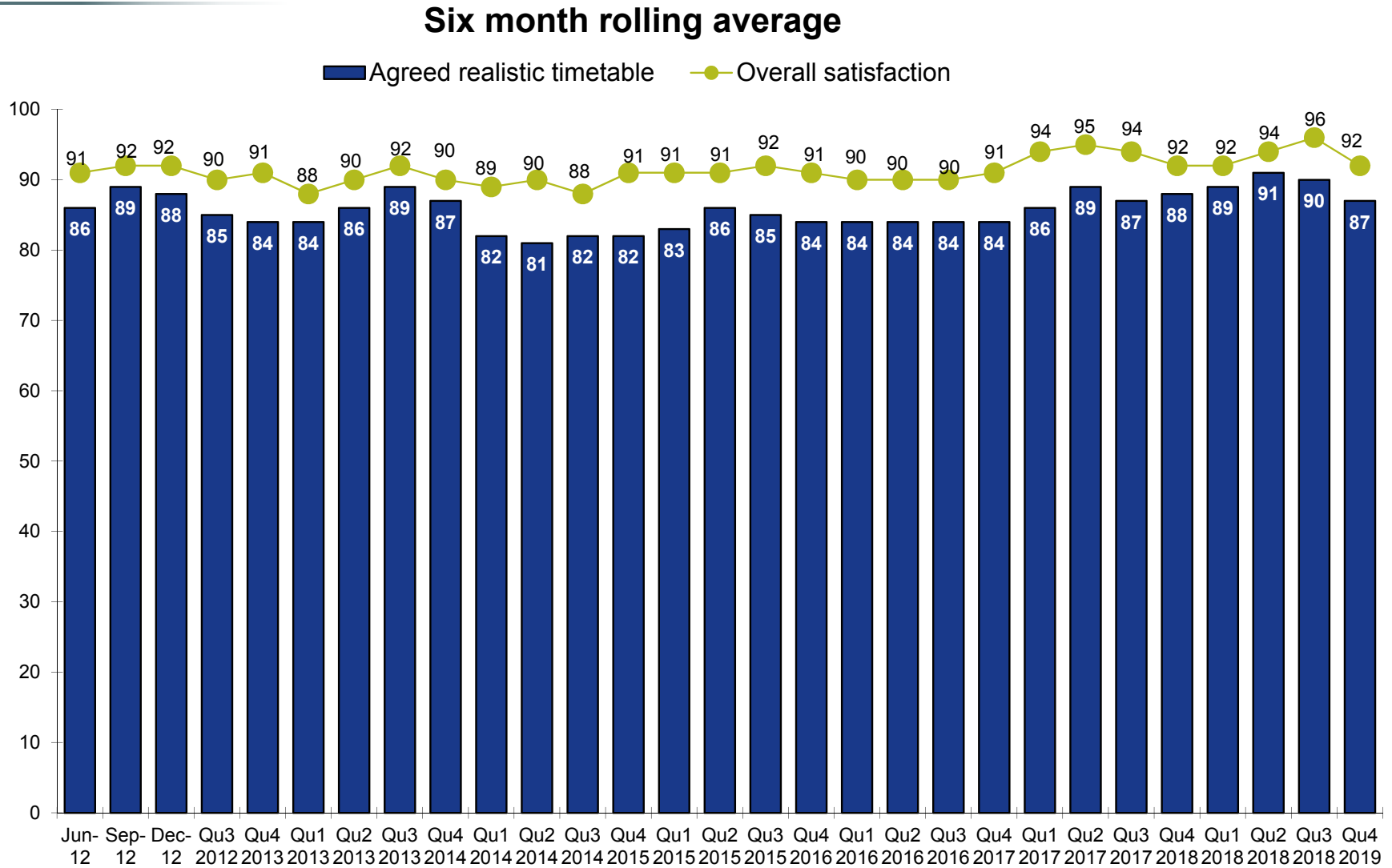
# Satisfaction and key driver variables: Satisfaction with Client Executive

## Six month rolling average

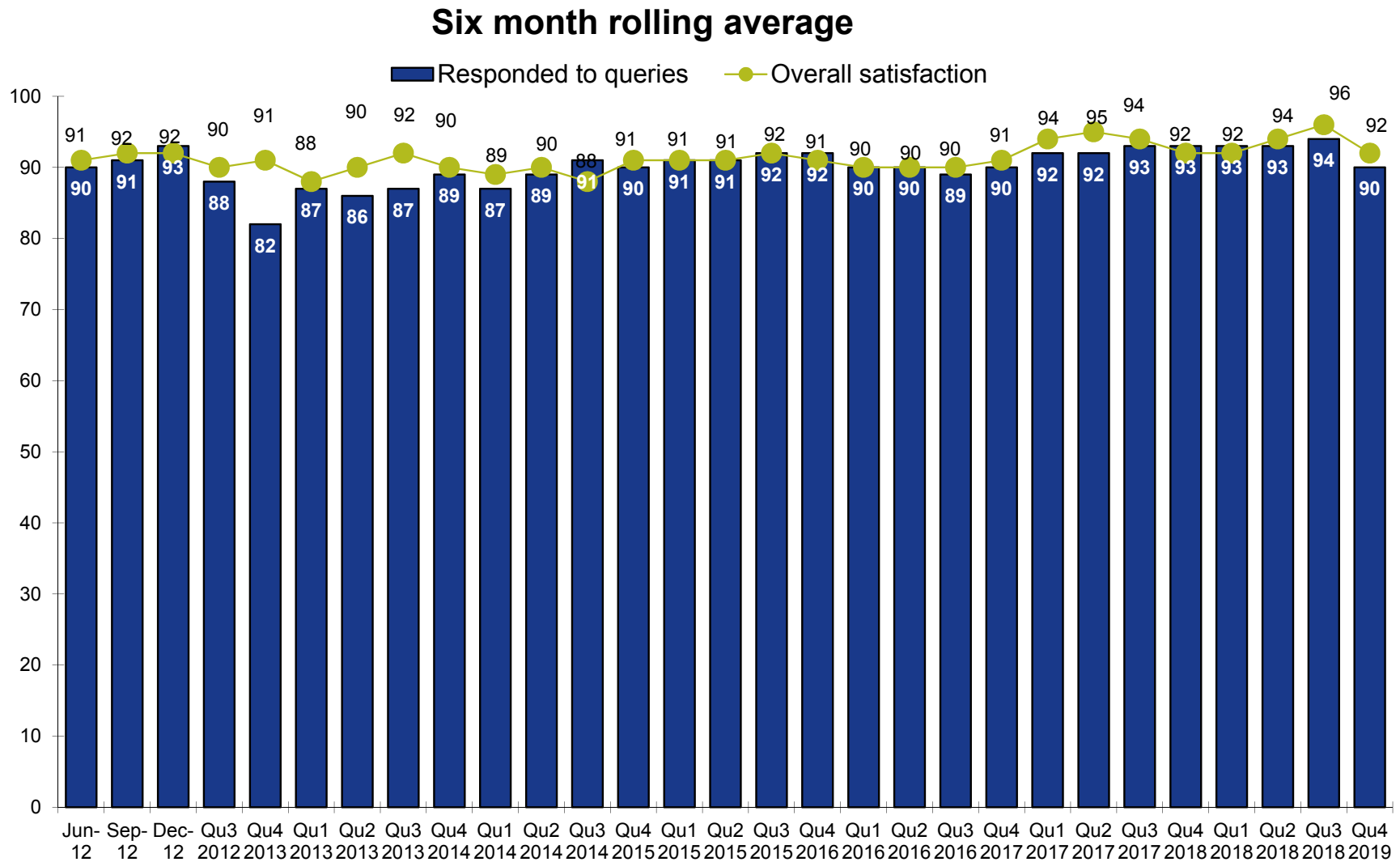
■ Satisfaction with Customer Executive ● Overall satisfaction



# Satisfaction and key driver variables: INI discussed and agreed a realistic timetable for planned activities

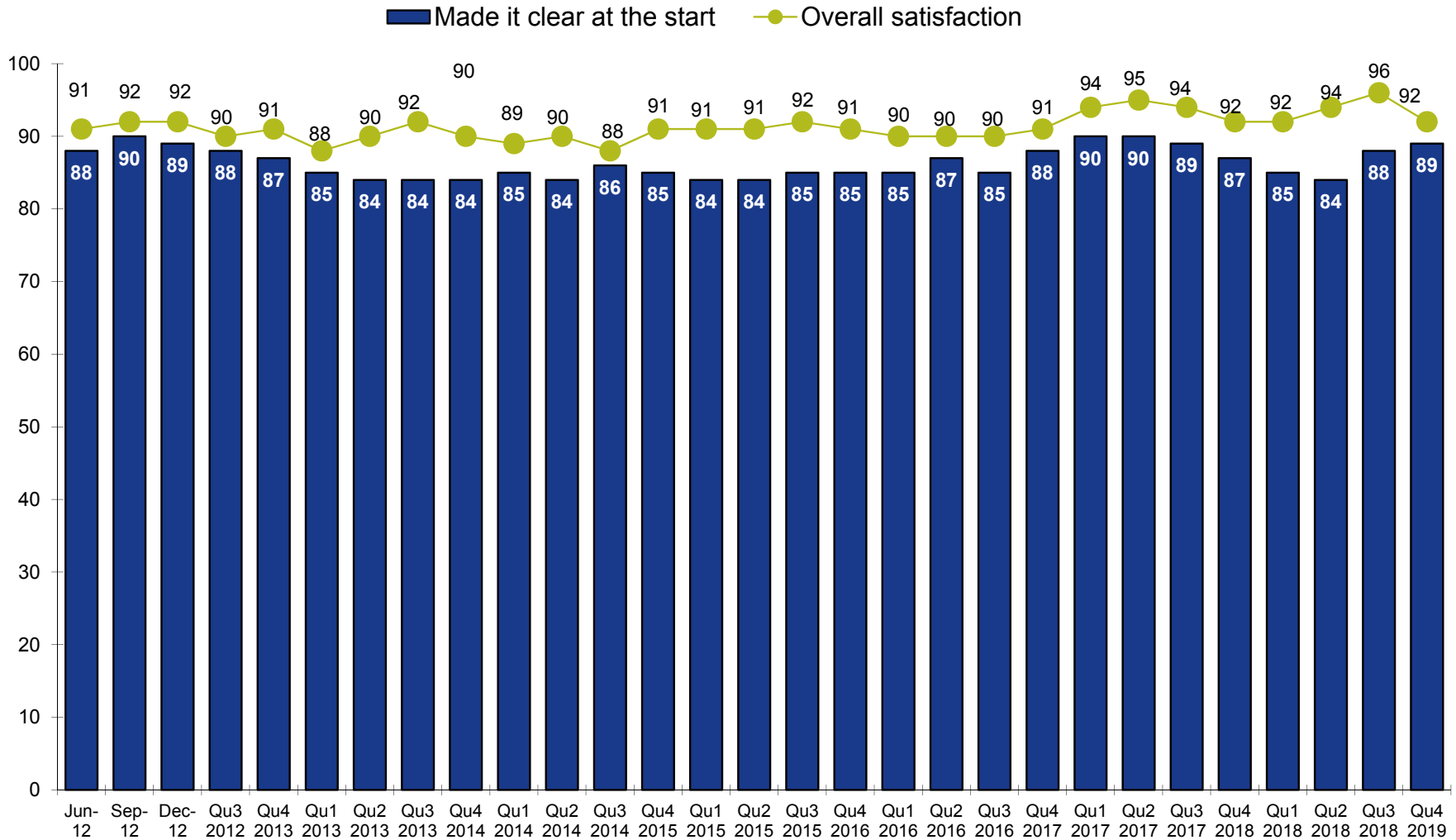


# Satisfaction and key driver variables: INI responded to your queries within a reasonable timeframe



# Satisfaction and key driver variables: INI made it clear at the start if and how they could assist your business

## Six month rolling average





## DETAILED PERFORMANCE MEASURES



# Performance Overall

## Customers



## Process - Management



## Process - Communication



Average Rating	
Nov-Mar '17	4.46
Apr-Jun'17	4.45
Jul-Sep'17	4.47
Oct-Dec'17	4.48
Jan-Mar-'18	4.47
Apr-Jun'-18	4.47
Jul-Sept'18	4.45
Oct-Dec'18	4.44
Jan-Mar'19	4.45

■ Jan-Mar

Using a scale from 1 to 5, where 1 means 'strongly agree' and 5 means 'strongly disagree', to what extent do you agree or disagree that Invest NI ...? [ Base: 204 Jan'19—Mar'19 ]

# Performance by Segment: Account Managed Customers

Base = 76



## Process - Management



## Process - Communication



Average Rating	
Nov-Mar '17	4.51
Apr-Jun'17	4.60
Jul-Sep'17	4.53
Oct-Dec'17	4.53
Jan-Mar'18	4.48
Apr-Jun'18	4.37
Jul-Sept'18	4.51
Oct-Dec'18	4.49
Jan-Mar'19	4.52

■ Jan-Mar

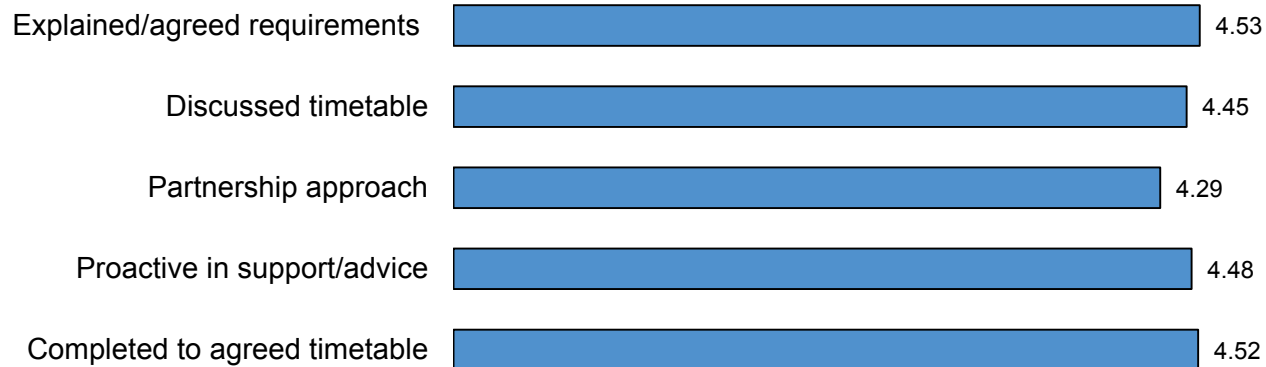
Using a scale from 1 to 5, where 1 means 'strongly agree' and 5 means 'strongly disagree', to what extent do you agree or disagree that Invest NI ...? [ Base: 76 Jan'19-Mar'19 ]

# Performance by Segment: Regional Office Customers

Base = 97



## Process - Management



## Process - Communication



Average Rating	
Nov-Mar '17	4.41
Apr-Jun'17	4.42
Jul-Sep'17	4.49
Oct-Dec'17	4.36
Jan-Mar'18	4.48
Apr-Jun'18	4.60
Jul-Sept'18	4.4
Oct-Dec'18	4.45
Jan-Mar'19	4.44

■ Jan-Mar

Using a scale from 1 to 5, where 1 means 'strongly agree' and 5 means 'strongly disagree', to what extent do you agree or disagree that Invest NI ...? [ Base: 97 Jan'19-Mar'19 ]

# Performance by Segment: Wider Business Base

Base = 31\*



## Process - Management



## Process - Communication



Average Rating	
Nov-Mar '17	4.48
Apr-Jun'17	4.18
Jul-Sep'17	4.26
Oct-Dec'17	4.50
Jan-Mar'18	4.23
Apr-Jun'18	4.29
Jul-Sept'18	4.51
Oct-Dec'18	4.29
Jan-Mar'19	4.32

■ Jan-Mar

Using a scale from 1 to 5, where 1 means 'strongly agree' and 5 means 'strongly disagree', to what extent do you agree or disagree that Invest NI ...? [ Base: 31\* Jan'19-Mar-19 ] \*Small Bases = less than 50