



Methodology

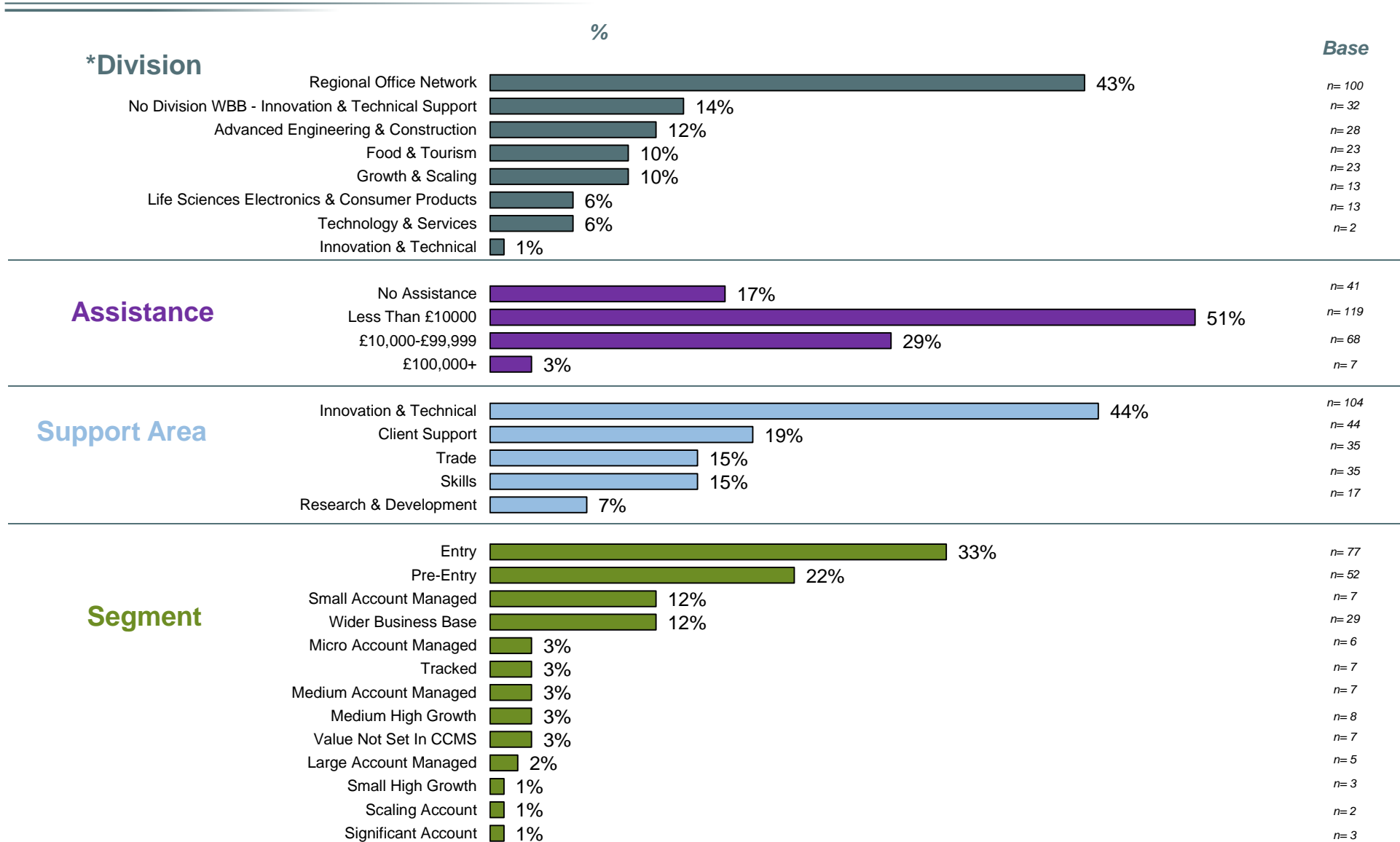
- In conducting this research a telephone methodology was employed. The 10 minute questionnaire had been utilised for many years and remained consistent to enable comparisons with previous waves.
- Throughout the fieldwork period, Millward Brown interviewers worked under direct supervision, with approximately 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 compliance with the International Standard ISO 20252:2012.



Sample

- Some 235 interviews were completed, 94 of these were Account Managed Customers and 96 were Regional Office Customers, all who accepted a letter of offer or support between April and June 2016. A sample of 45 were the Wider Business Base who had some form of interaction with Invest NI between April and June 2016. Of the 194 participating customers and WBB, 156 Customers and 38 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.
- For example, in Q1 2016, 235 interviews were conducted so when analysing results by level of financial assistance base sizes can drop as low as 7 (those receiving £100,000+).

Analysis of Sample



*1 company from High Potential Start Up / 1 company from Research & Development

Technical Note

- **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

Key Performance Indicators

- In Q1 2016, satisfaction with overall service received remained high across the total sample with 9 in 10 (90%) claiming to be satisfied. Within this, two thirds (66%) were 'very satisfied' with Invest NI overall. These satisfaction results are consistent with Q4 trends.
- Overall satisfaction levels were high among Account Managed Customers with over 9 in 10 (92%) customers expressing satisfaction with the service provided and over 7 in 10 (71%) of those stating that they were 'very satisfied'. Overall levels of satisfaction among Regional Office Customers has experienced a downward trend (87% from 94%), with 3 in 5 (61%) claiming to be 'very satisfied' (down from 71%).
- Satisfaction levels among WBB customers has increased from Q4 (88% from 86%), with around two thirds (64%) expressing strong satisfaction.
- Levels of satisfaction remained high across the support areas with Grant Support achieving the highest mean satisfaction score (4.66 out of a possible 5) compared with those receiving Programme Support (4.5 out of a possible 5).



Executive Summary (2) – Customers

Key Performance Indicators

- In Q1 2016, advocacy levels remain consistently high with almost 9 in 10 (87%) customers stating they would speak highly of Invest NI (87% in Q4).
- Advocacy levels were highest among Account Managed customers (92%) increasing slightly since Q4 (89%). Advocacy among Regional Office customers was also high (82%) although a downward trend on the Q4 level (89%). Advocacy among WBB has remained consistent with Q4 at 86%.
- Levels of advocacy was slightly higher among those in receipt of grant support than those receiving programme support (4.43 vs. 4.39).
- Invest NI achieved a Net Promoter Score of +62 in Q1 2016, fairly consistent with Q4 (+63). The Net Promoter Score is highest among Account Managed Customers (+69). The Net Promoter Score among Account Managed customers recorded an increase from +64 in Q4, with the Net Promoter Score among WBB also increasing from +43 to +61. There has been a decline in the Net Promoter Score among Regional Office Customers from +68 in Q4 to +58 in Q1.



Executive Summary (3) – Customers

- More than 4 in 5 (85%) customers agreed that Invest NI was helping to develop their business, consistent with Q4 (82%). Agreement is highest among Account Managed customers (89%) increasing from 83% in Q4. Agreement among Regional Office Customers was 85%. There is an increase in agreement among WBB which has risen to 76% from 61% in Q4.
- In terms of support areas, the highest mean score in relation to Invest NI helping develop business was achieved among those receiving grant support (4.58) compared to programme support (4.38).
- Over 9 in 10 (93%) customers agreed that Invest NI acts with professionalism and integrity, with almost 4 in 5 (80%) customers strongly agreeing with this sentiment. Agreement was highest among Account Managed customers with almost all (97%) agreeing. Just over 9 in 10 (92%) Regional Office customers were in agreement that Invest NI acts with professionalism and integrity.
- Mean scores across those in receipt of grant support (4.75 out of 5) were slightly higher than those receiving programme support (4.69 out of 5).
- Some 7 in 10 (70%) of customers were in agreement that Invest NI exceeded their expectations, consistent with Q4 (71%). Agreement is highest among Account Managed customers (80%) while agreement among Regional Office customers was 63% in Q1.

Executive Summary (4) – Customers

- More than four fifths (84%) of customers agreed that Invest NI delivered value to their business, remaining consistent with the Q4 level (84%). Agreement was highest among Account Managed customers (90%) with almost 7 in 10 strongly agreeing with the statement (68%). Agreement among Regional Office customers was lower (82%). WBB had the lowest overall agreement (80%), although increasing since Q4 (74%).
- Over 3 in 5 (63%) of customers agreed that they received information on additional support programmes that are available from Invest NI (down from 73% in Q4) . Agreement regarding receiving information on additional support decreased across Regional Office customers (59% in Q1 from 81% in Q4), with agreement also declining across WBB (49% in Q1 from 56% in Q4). Agreement among Account Managed customers revealed an upward trend (74% in Q1 from 72% in Q4).
- More than four fifths (84%) of customers were in agreement that a realistic timescale was discussed and agreed for planned activities (82% in Q4). Agreement among Account Managed customers (90%) shows an upward trend since Q4 (85%) while agreement among Regional Office customers remained consistent (84% in Q1 / 85% in Q4). Agreement was also fairly consistent among WBB (71% in Q1 and 72% in Q4).
- More than 9 in 10 (95%) customers were in agreement that Invest NI treated them fairly similar to Q4 (93%). Agreement is highest among Account Managed customers (97% in Q1 from 93% in Q4). Agreement was also high among Regional Office customers (95%), consistent with Q4, while agreement across WBB also remained consistent (91% in Q1 and Q4).



Executive Summary (5) – Customers

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 2016, all key drivers of satisfaction achieved a mean score of no less than 4.34 out of a possible 5. The top rated drivers for Q1 included; satisfaction with the Client Executive (4.66) and responding to queries in a reasonable timeframe (4.58).

Executive Summary (6) – Customers

Detailed Performance Measures

- In Q1 2016, the average mean score for overall performance was 4.46 out of a possible 5.
- All performance areas achieved a mean score of no less than 4.34 out of a possible 5.
- The strongest performing areas were clear communication (4.63) and responding to queries in a reasonable timeframe (4.58).
- The weaker aspects of the engagement included proactive support / advice (4.37) having a partnership approach (4.34) and tailoring responses to the needs of the business (4.36).
- The mean score for the overall performance by segment were as follows:
 - Account Managed customers = 4.58
 - Regional Office customers = 4.38
 - Wider Business base = 4.37

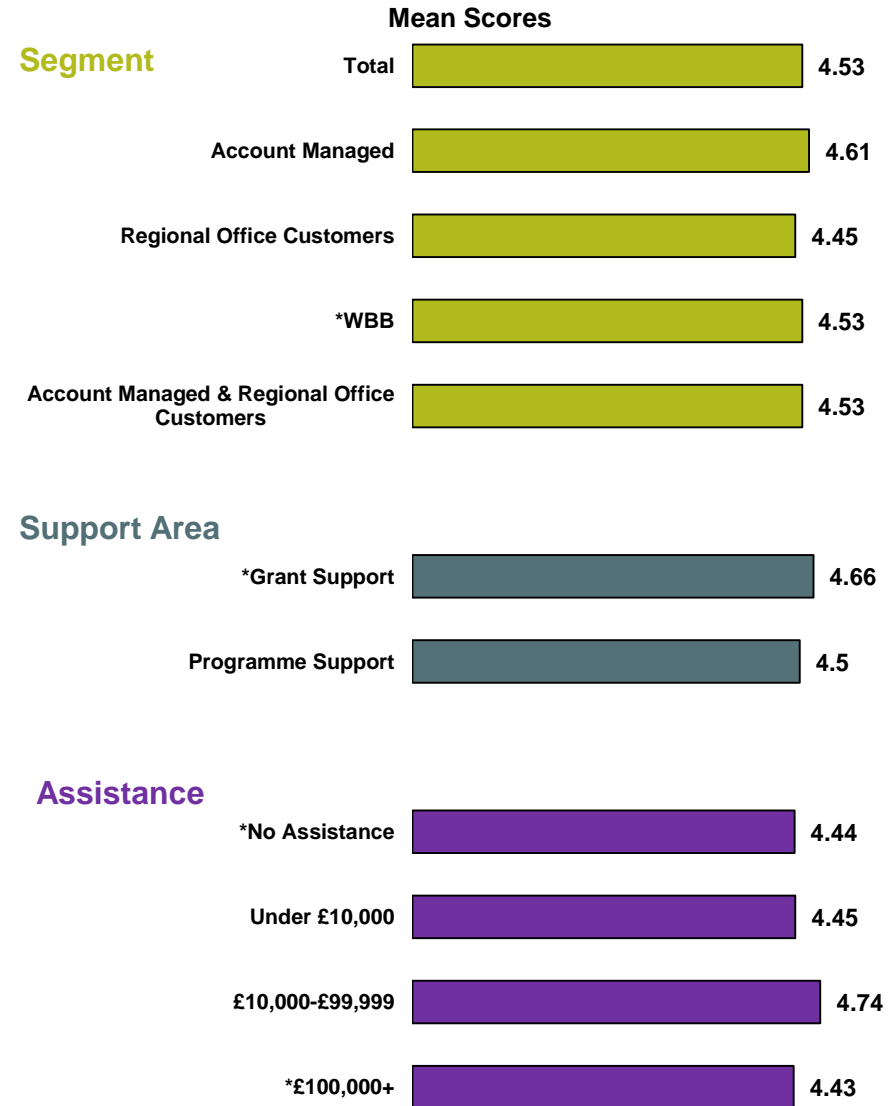
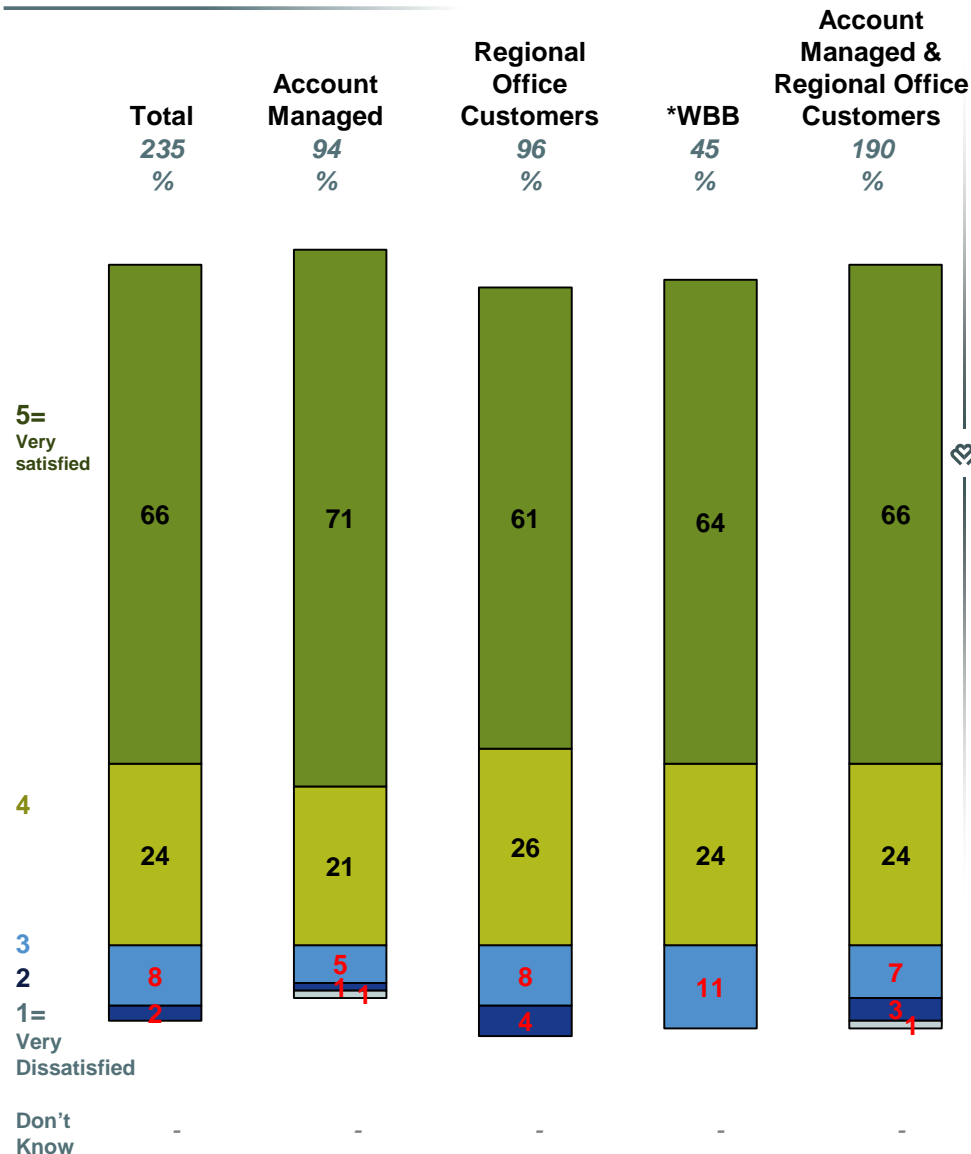


SATISFACTION



Key Performance Indicator – Satisfaction

**Small Bases = less than 50*



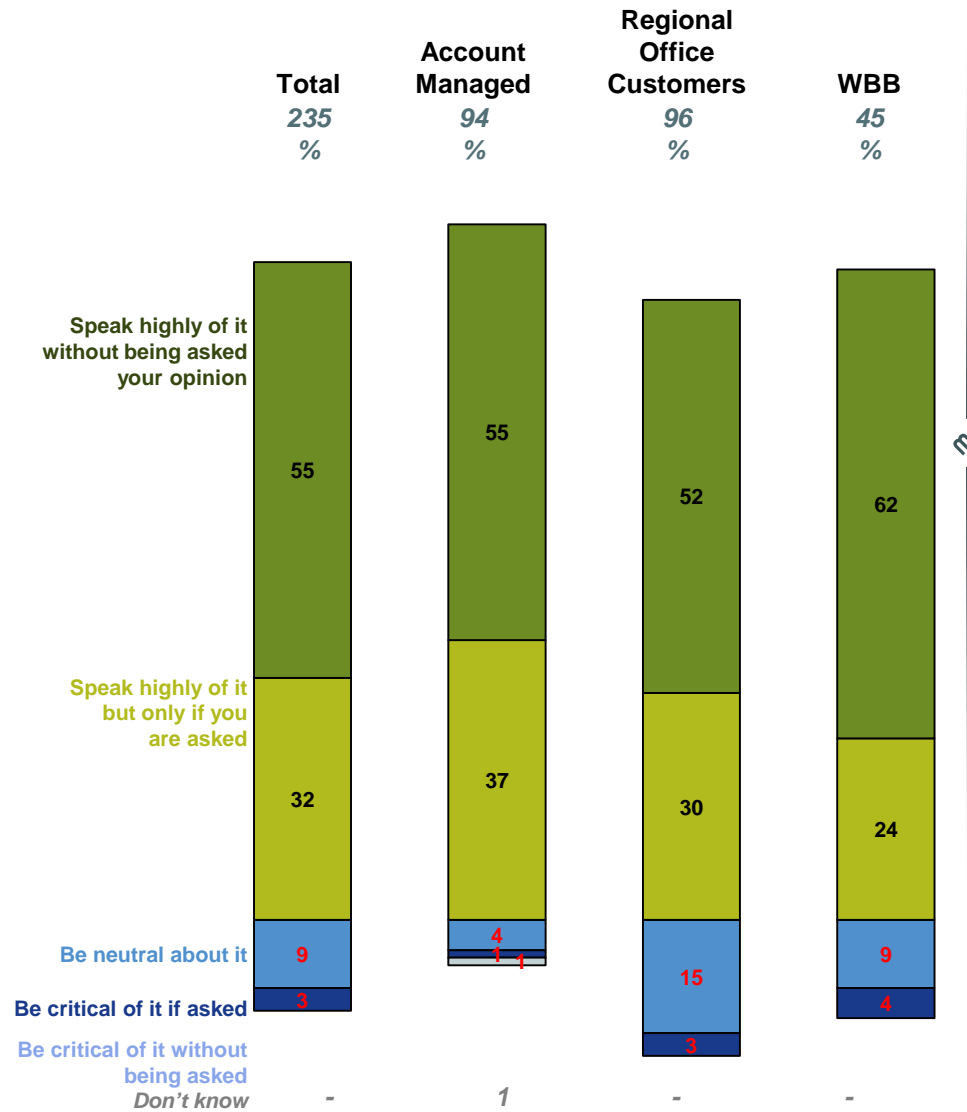
How satisfied or dissatisfied are you with Invest NI overall in relation to this project?
 [Base: 235 Apr-Jun '16 (94 Account Managed, 96 Regional Office Customers and 45 WBB)]

ADVOCACY



Key Performance Indicator – Advocacy

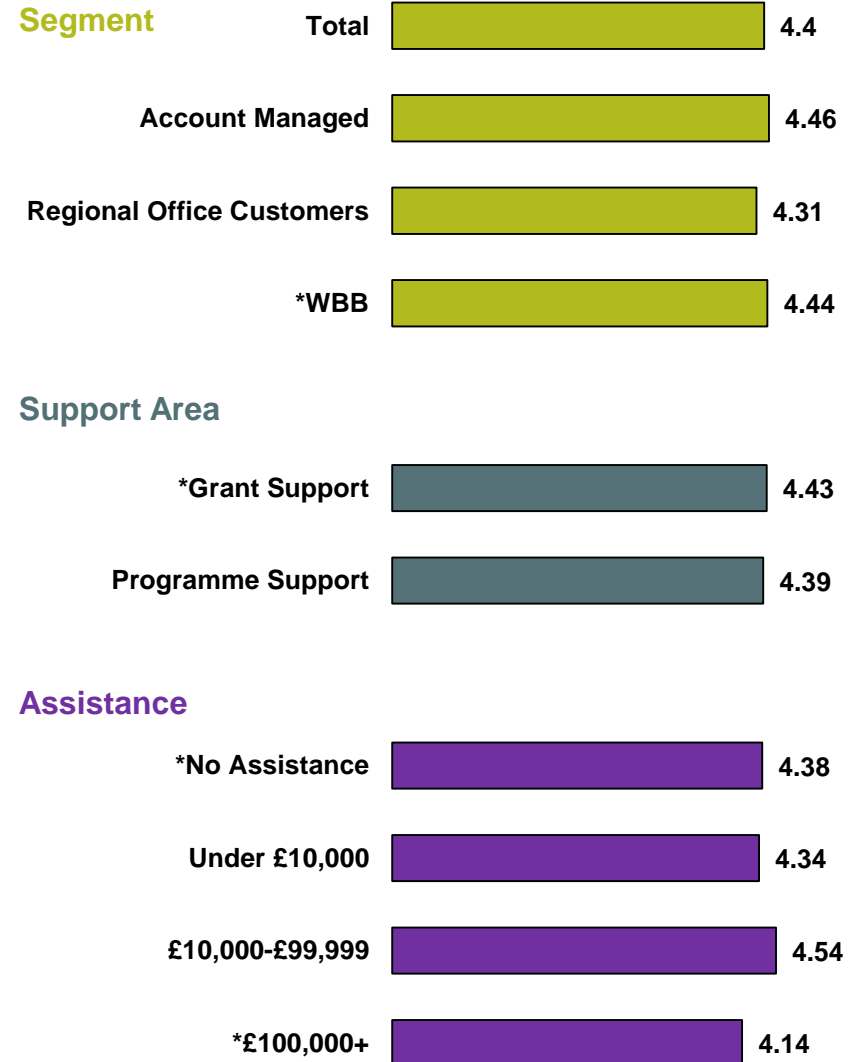
*Small Bases = less than 50



How highly would you speak about Invest NI?

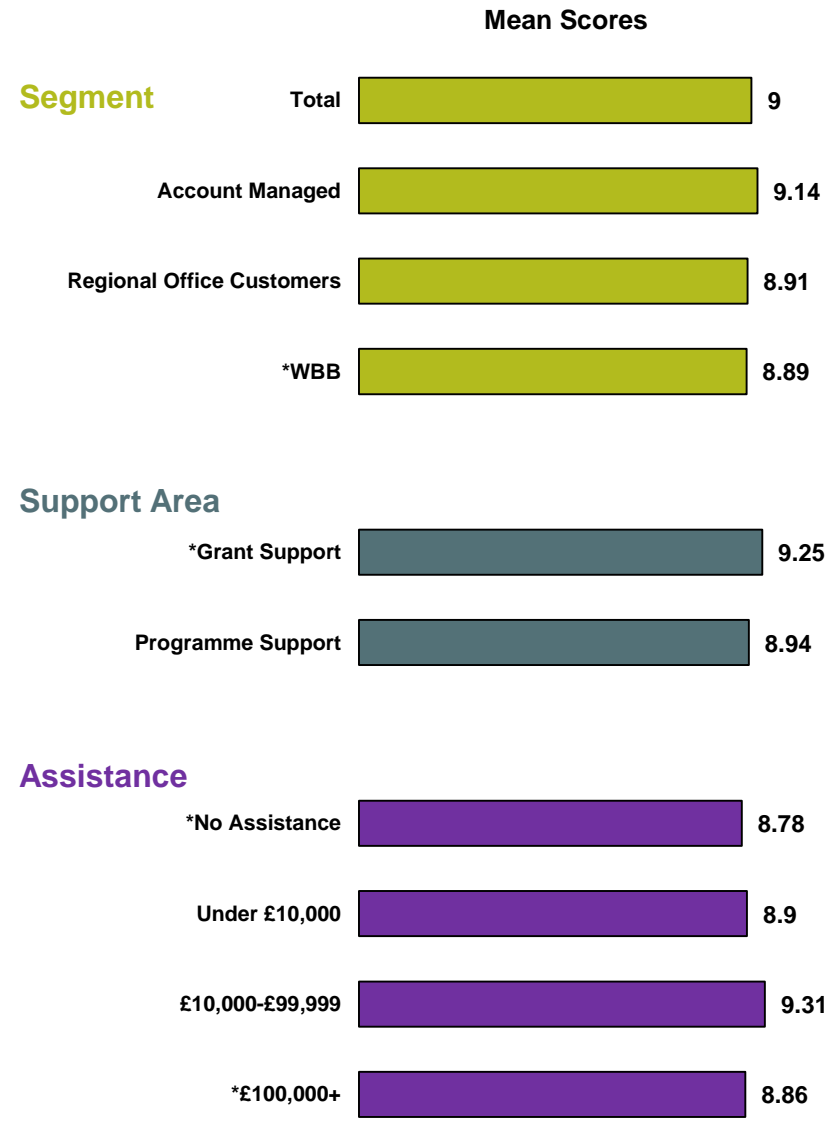
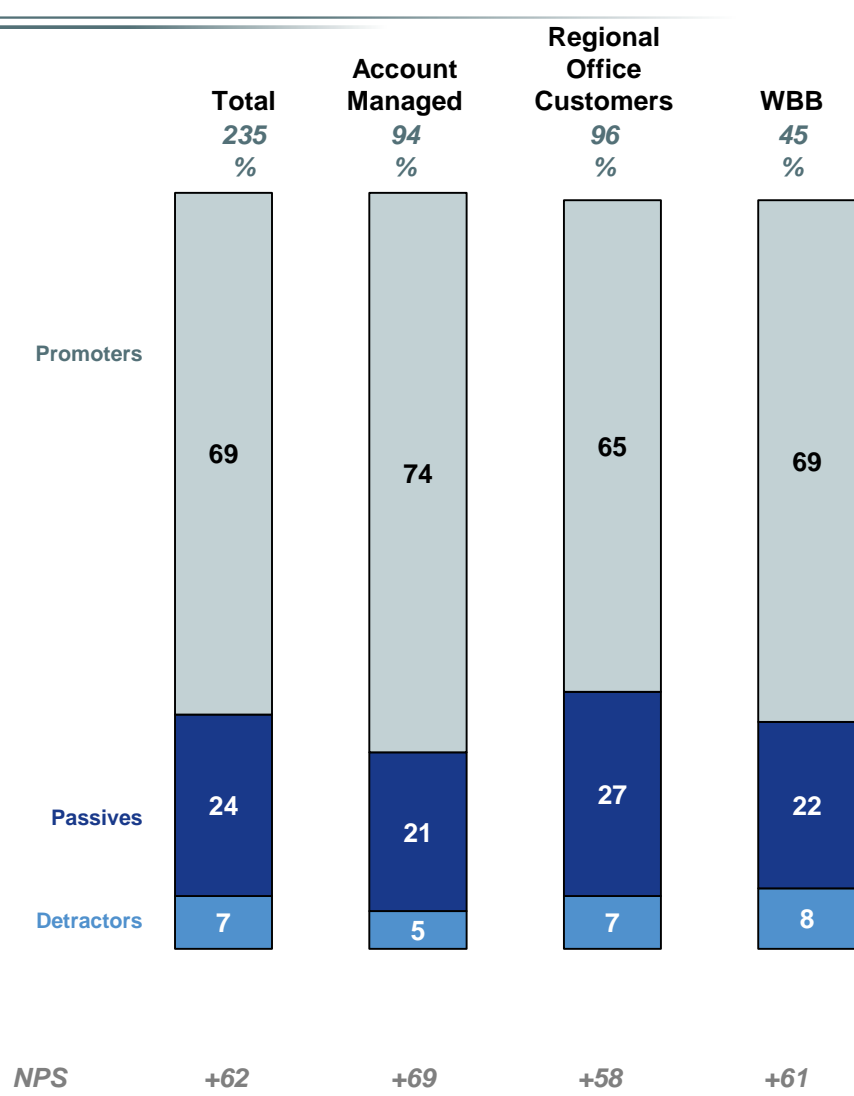
[Base: 235 Apr-Jun '16 (94 Account Managed, 96 Regional Office Customers and 45 WBB)]

Mean Scores



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: 235 Apr-Jun '16 (94 Account Managed, 96 Regional Office Customers and 45 WBB)]

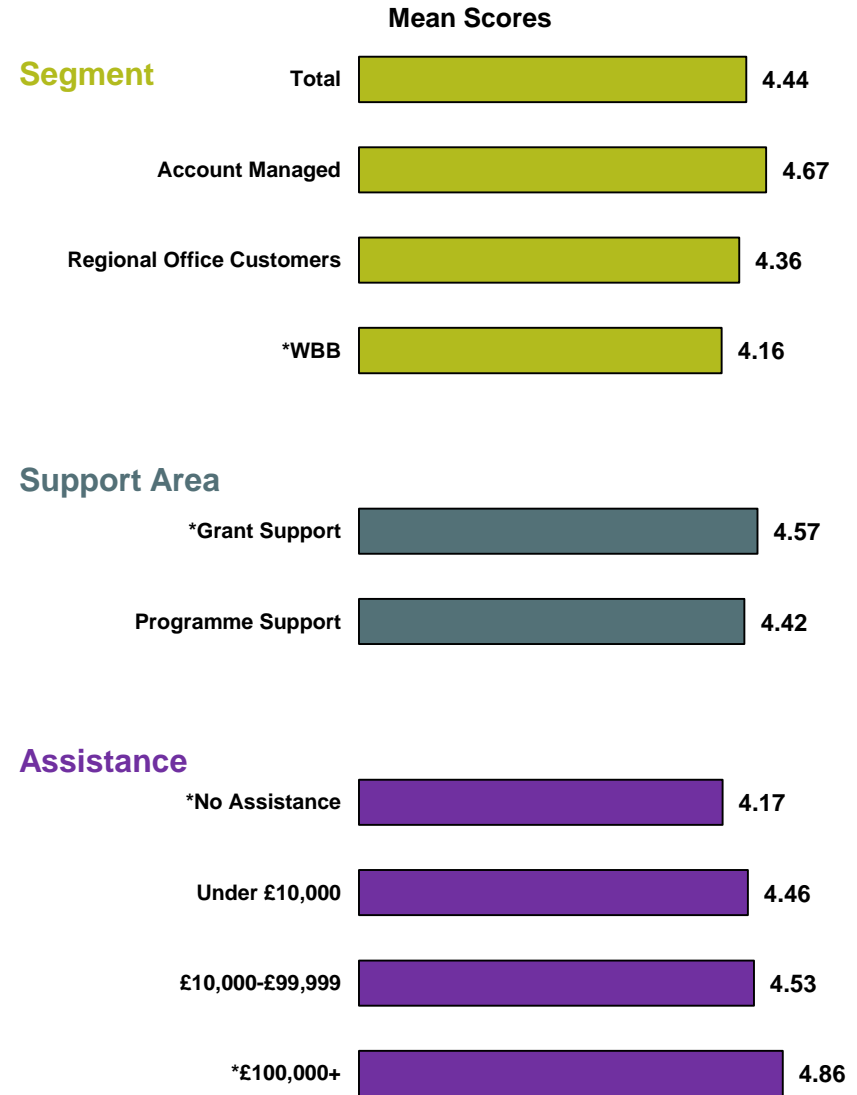
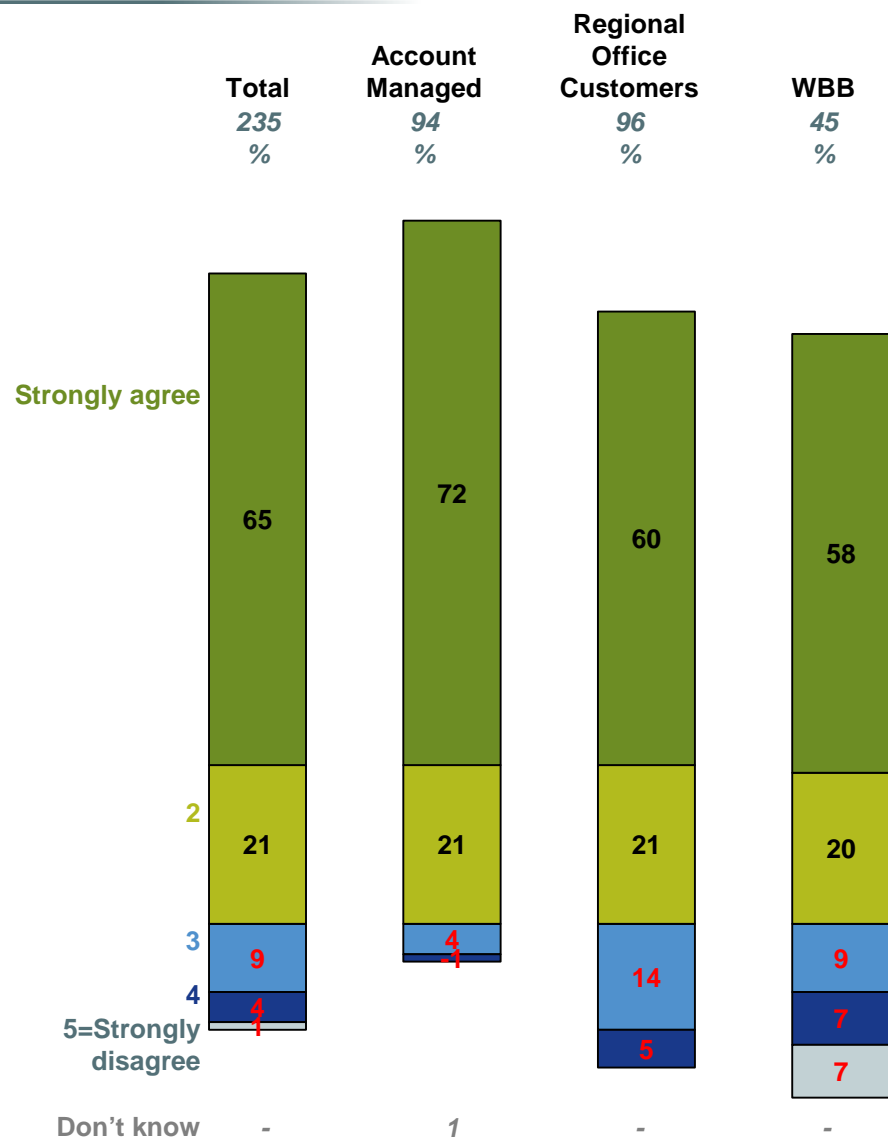
CLIENT FOCUSED



Key Performance Indicator – Client Focused

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

**Small Bases = less than 50*

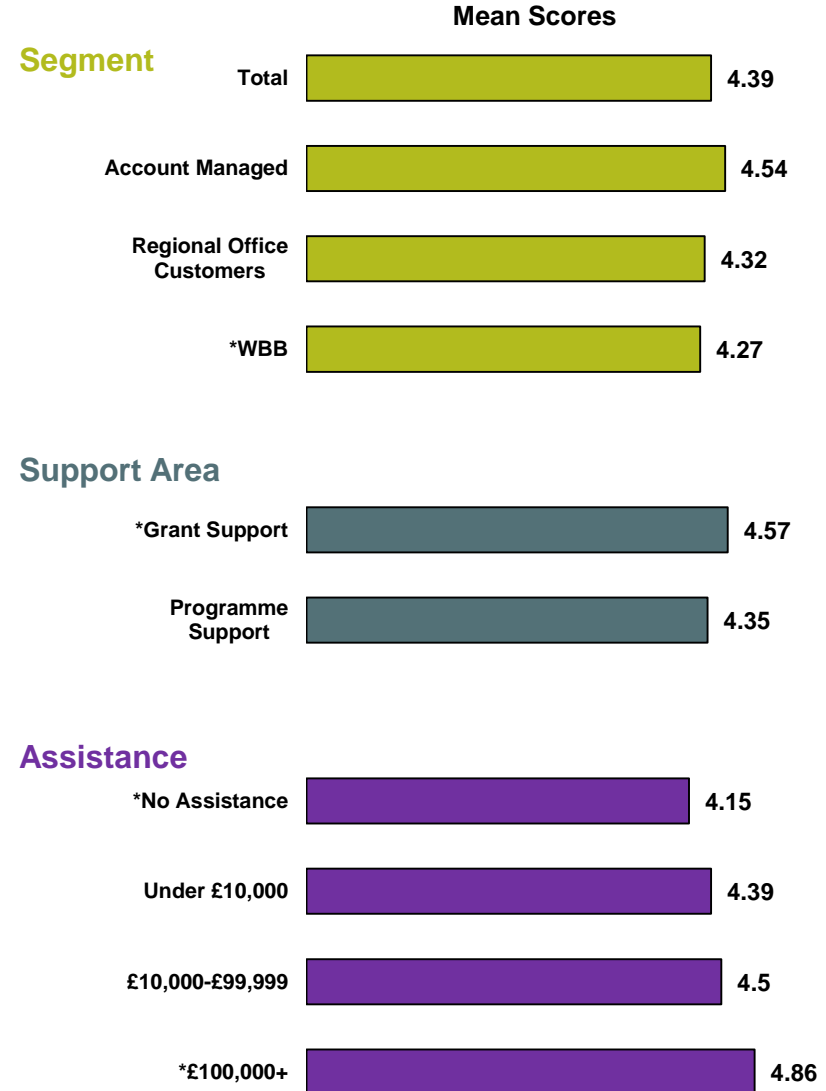
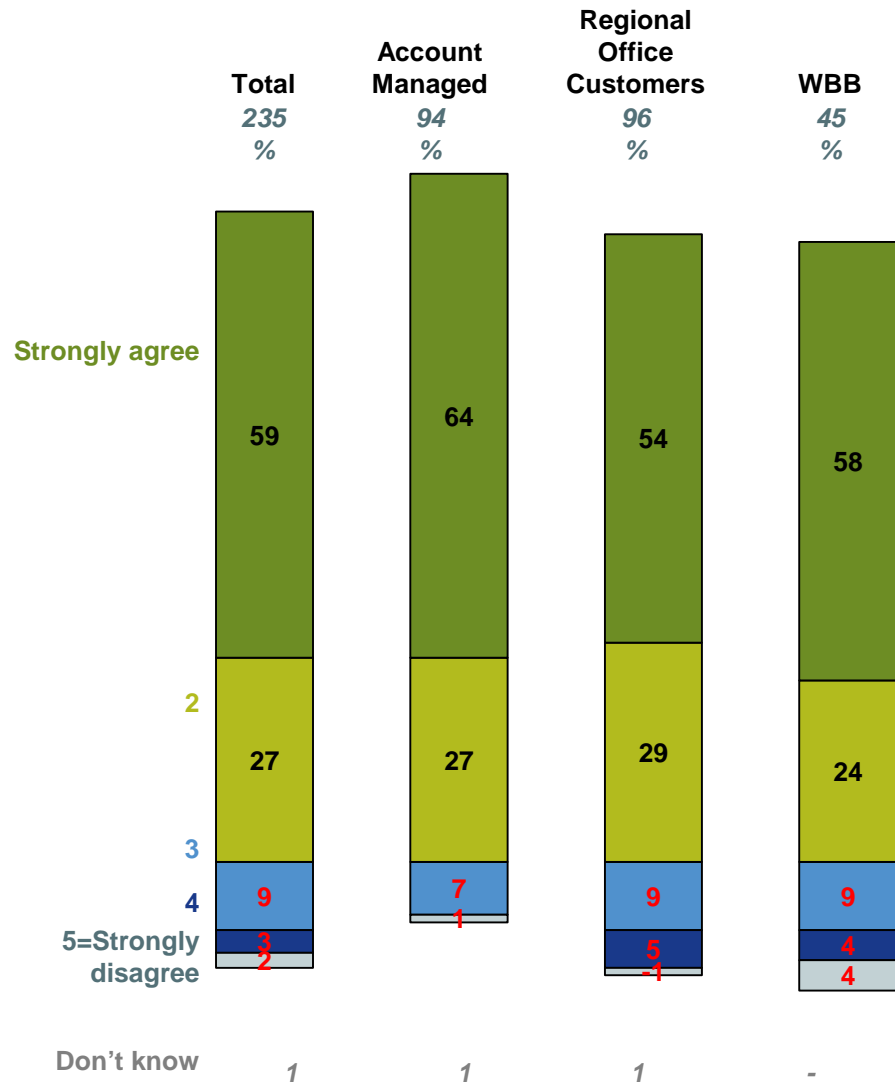


Using a scale from 1 to 5, where 1 means 'strongly agree' and 5 means 'strongly disagree', to what extent do you agree or disagree that Invest NI ...? [Base: 235 Jan-Mar '16 (94 Account Managed, 96 Regional Office Customers and 45 WBB)]

Key Performance Indicator – Client Focused

'Had sufficient understanding of your business needs'

*Small Bases = less than 50

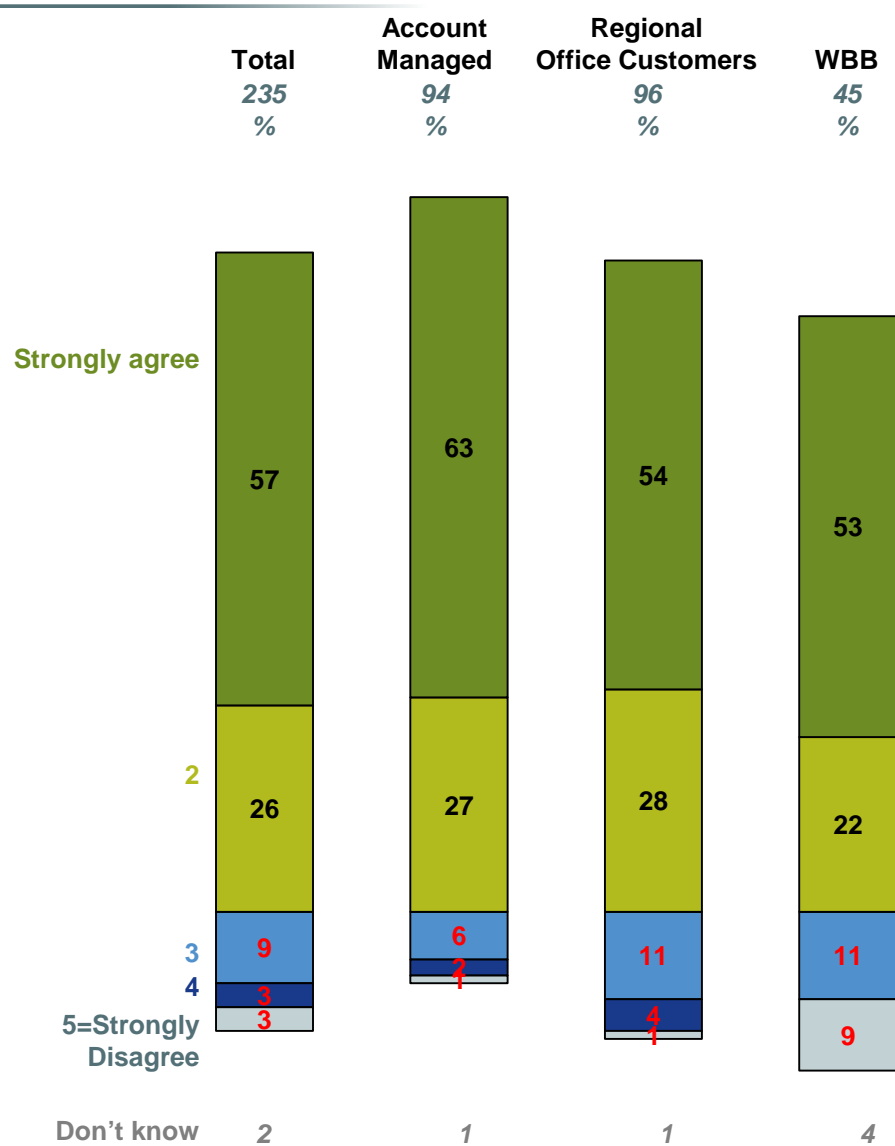


Using a scale from 1 to 5, where 1 means 'strongly agree' and 5 means 'strongly disagree', to what extent do you agree or disagree that Invest NI ...? [Base: 235 Apr-Jun '16 (94 Account Managed, 96 Regional Office Customers and 45 WBB)]

Key Performance Indicator – Client Focused

‘Tailored its response to meet your business needs’

**Small Bases = less than 50*

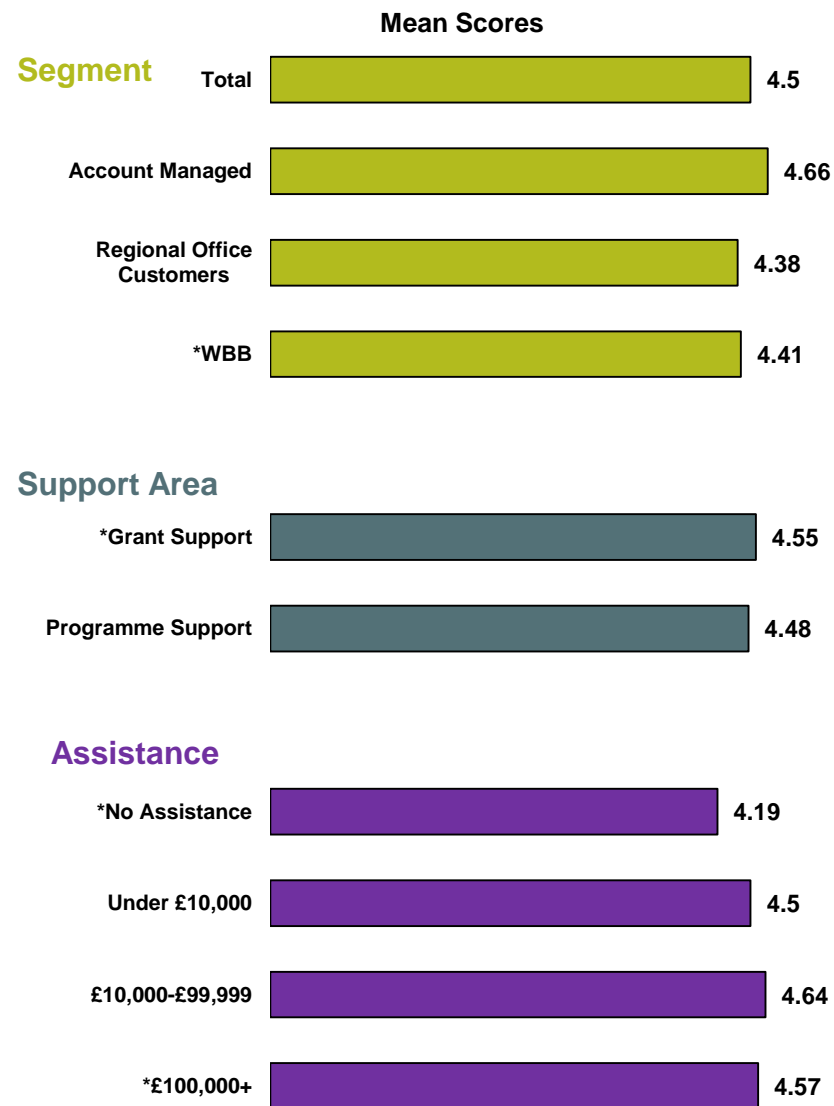
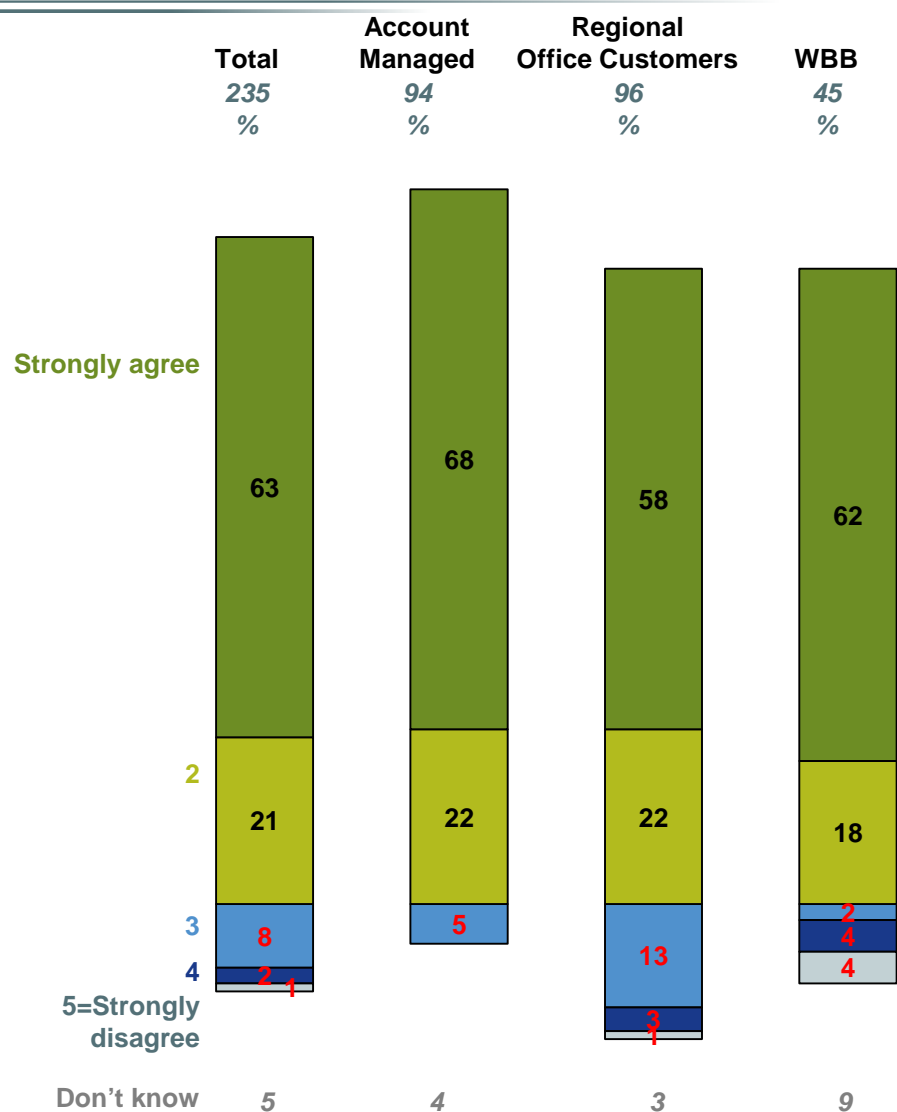


Using a scale from 1 to 5, where 1 means 'strongly agree' and 5 means 'strongly disagree', to what extent do you agree or disagree that Invest NI ...? [Base: 235 Apr-Jun '16 (94 Account Managed, 96 Regional Office Customers and 45 WBB)]

Key Performance Indicator – Client Focused

‘Delivered value to your business’

**Small Bases = less than 50*

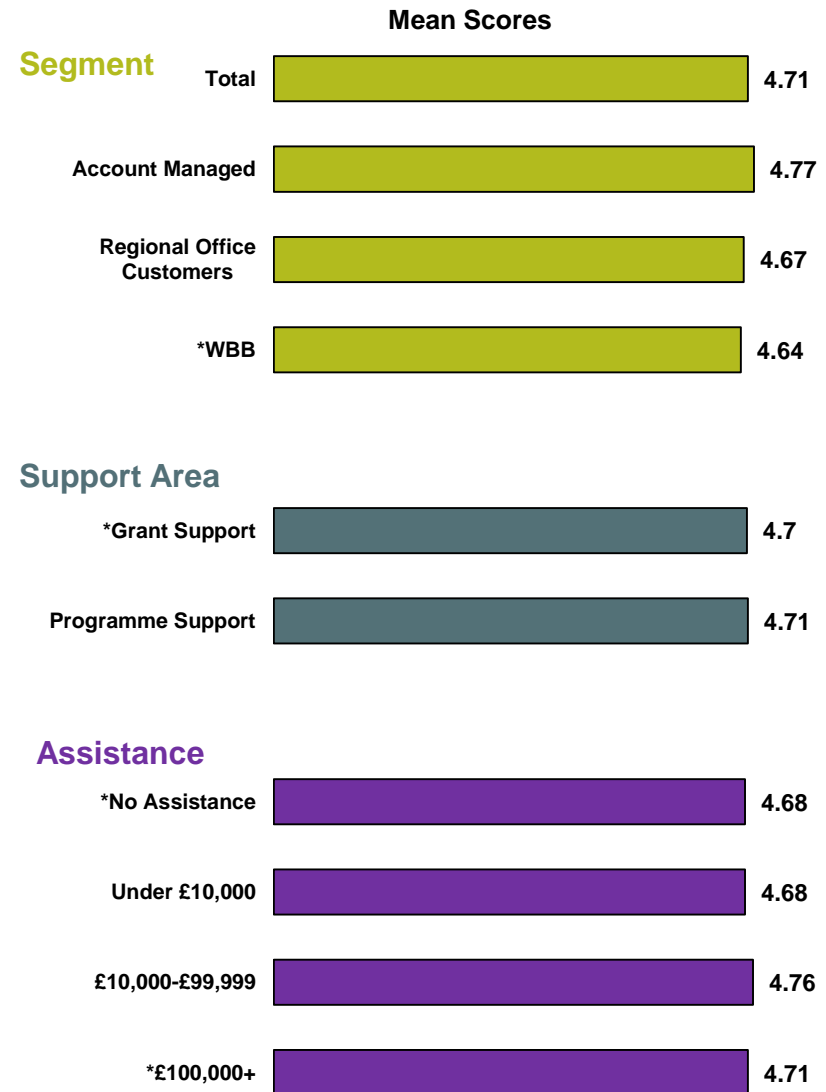
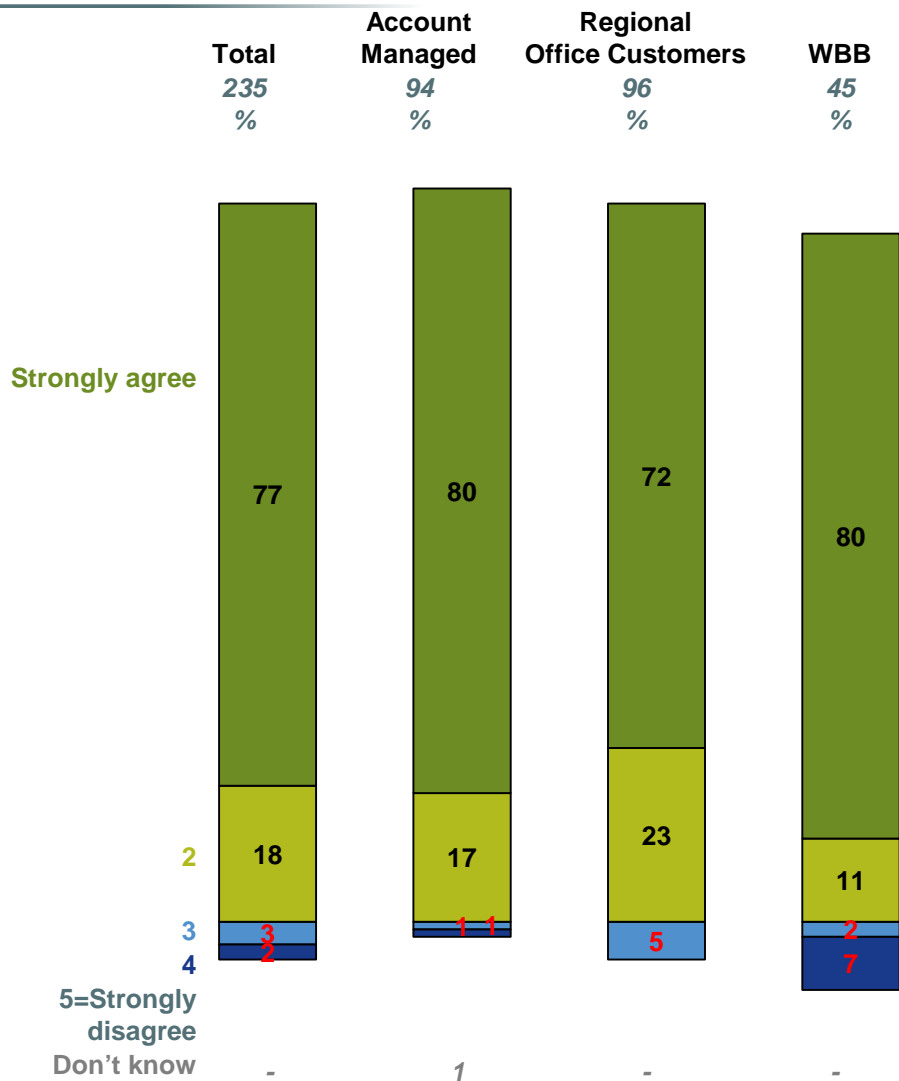


Using a scale from 1 to 5, where 1 means 'strongly agree' and 5 means 'strongly disagree', to what extent do you agree or disagree that Invest NI ...? [Base: 235 Apr-Jun '16 (94 Account Managed, 96 Regional Office Customers and 45 WBB)]

Key Performance Indicator – Client Focused

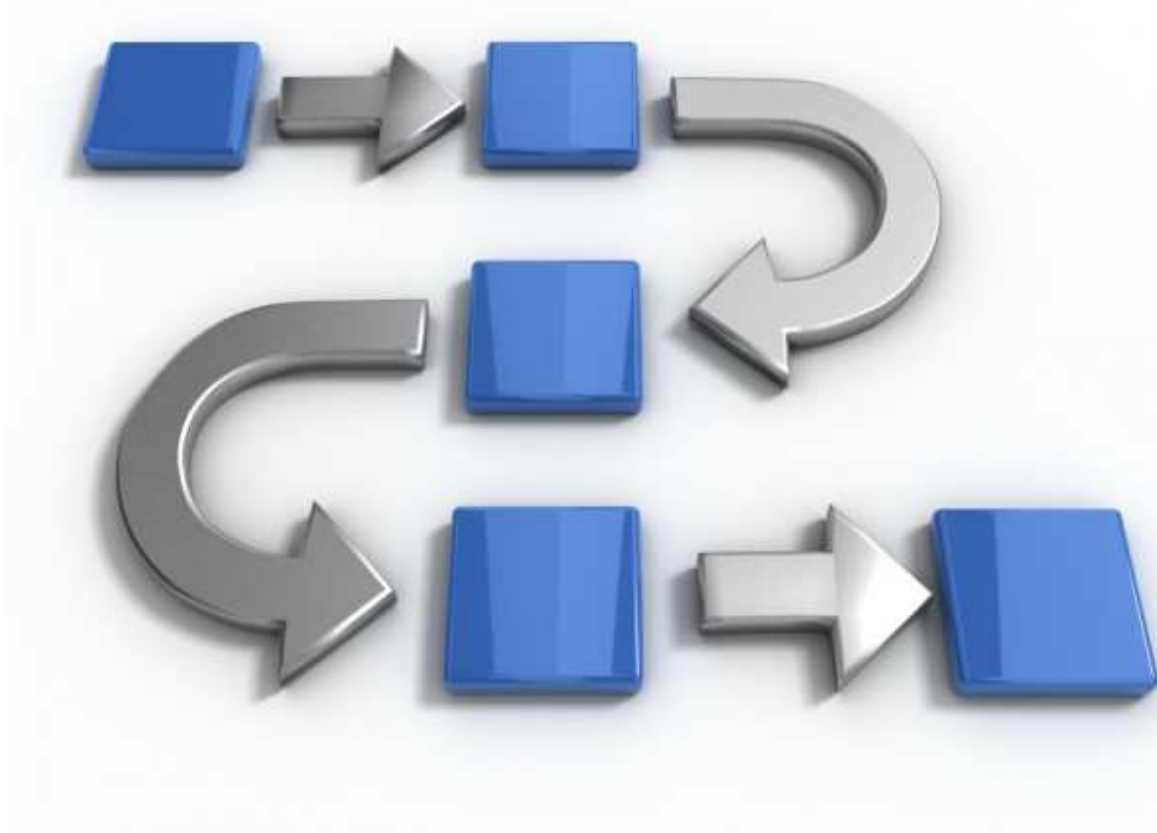
'Treated You Fairly'

*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: 235 Apr-Jun '16 (94 Account Managed, 96 Regional Office Customers and 45 WBB)]

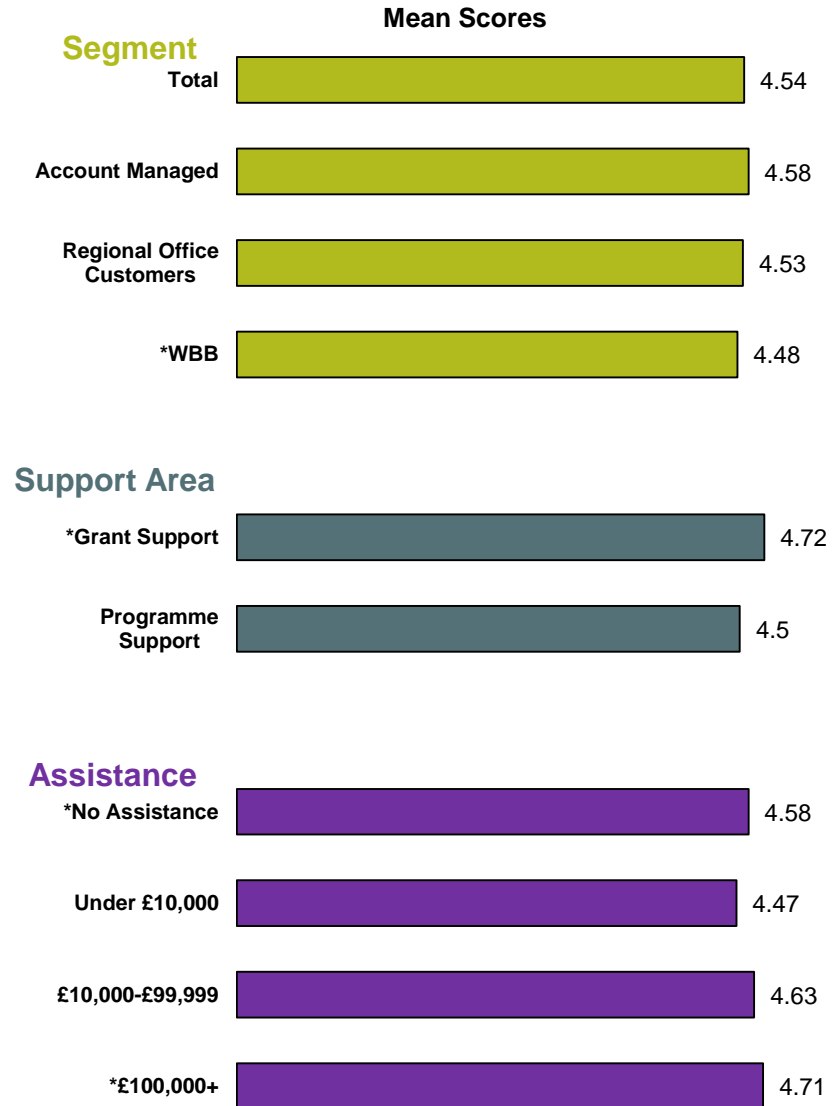
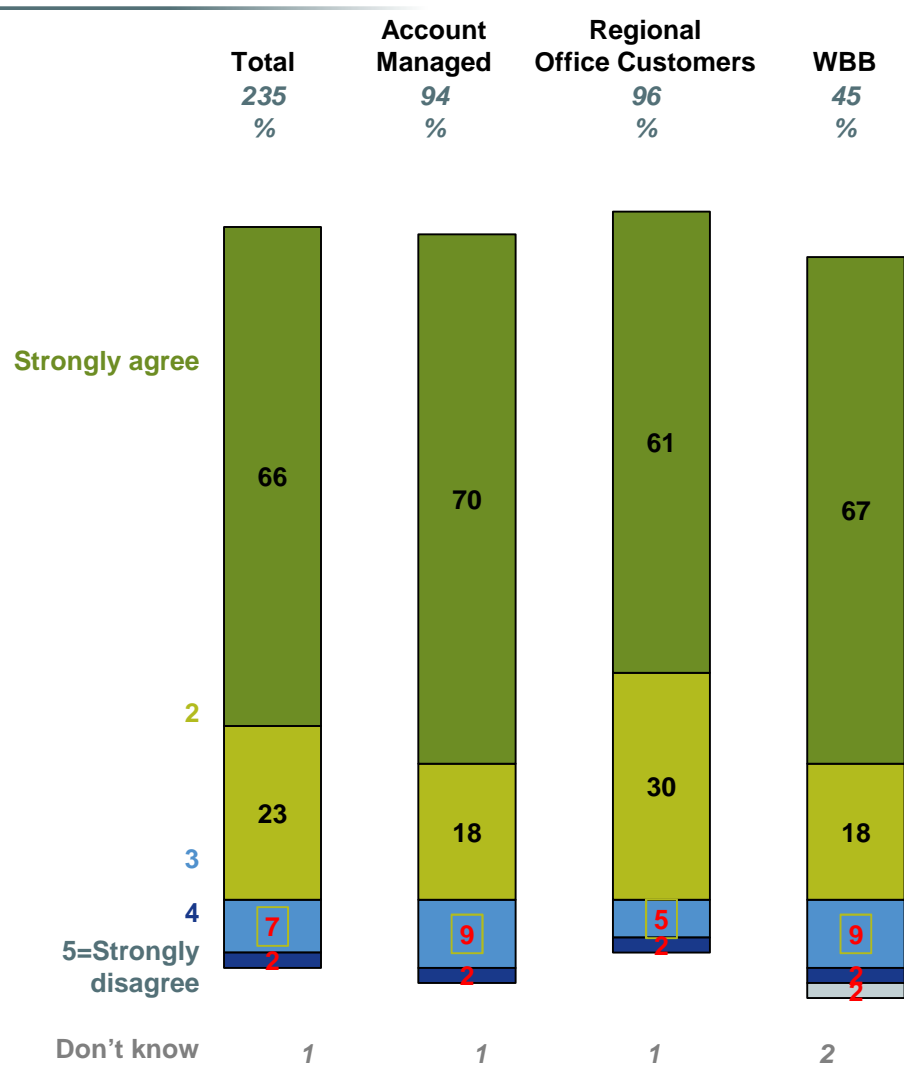
PROCESS MANAGEMENT



Key Performance Indicator – Process Management

‘Explained and agreed detailed requirements’

**Small Bases = less than 50*

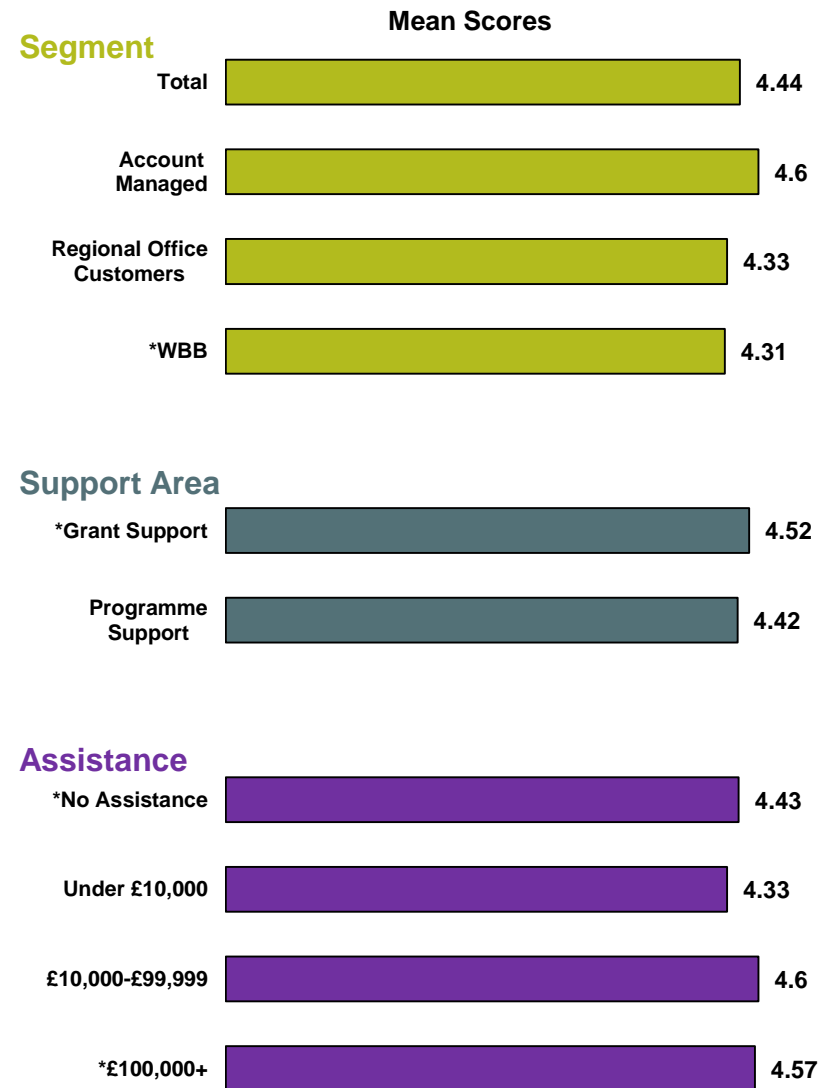
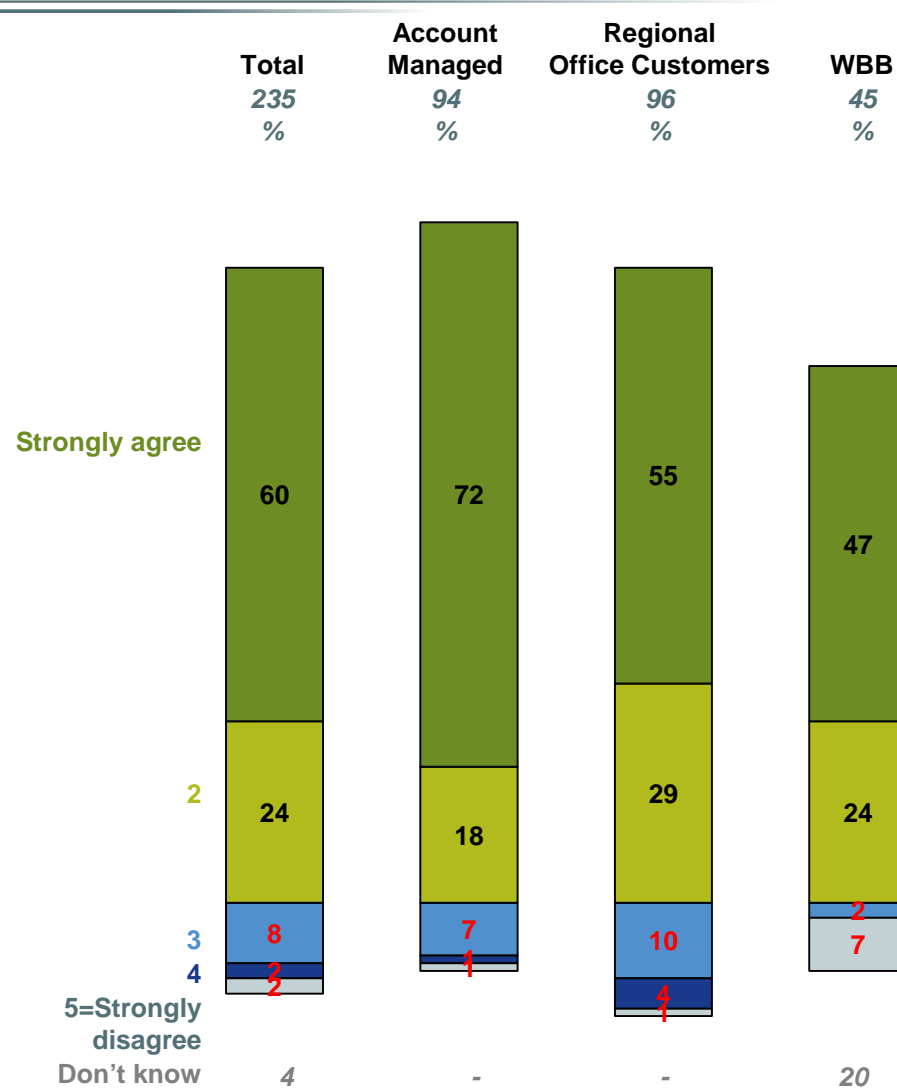


Using a scale from 1 to 5, where 1 means 'strongly agree' and 5 means 'strongly disagree', to what extent do you agree or disagree that Invest NI ...? [Base: 235 Apr-Jun '16 (94 Account Managed, 96 Regional Office Customers and 45 WBB)]

Key Performance Indicator – Process Management

‘Discussed and agreed a realistic timescale for planned activities’

**Small Bases = less than 50*

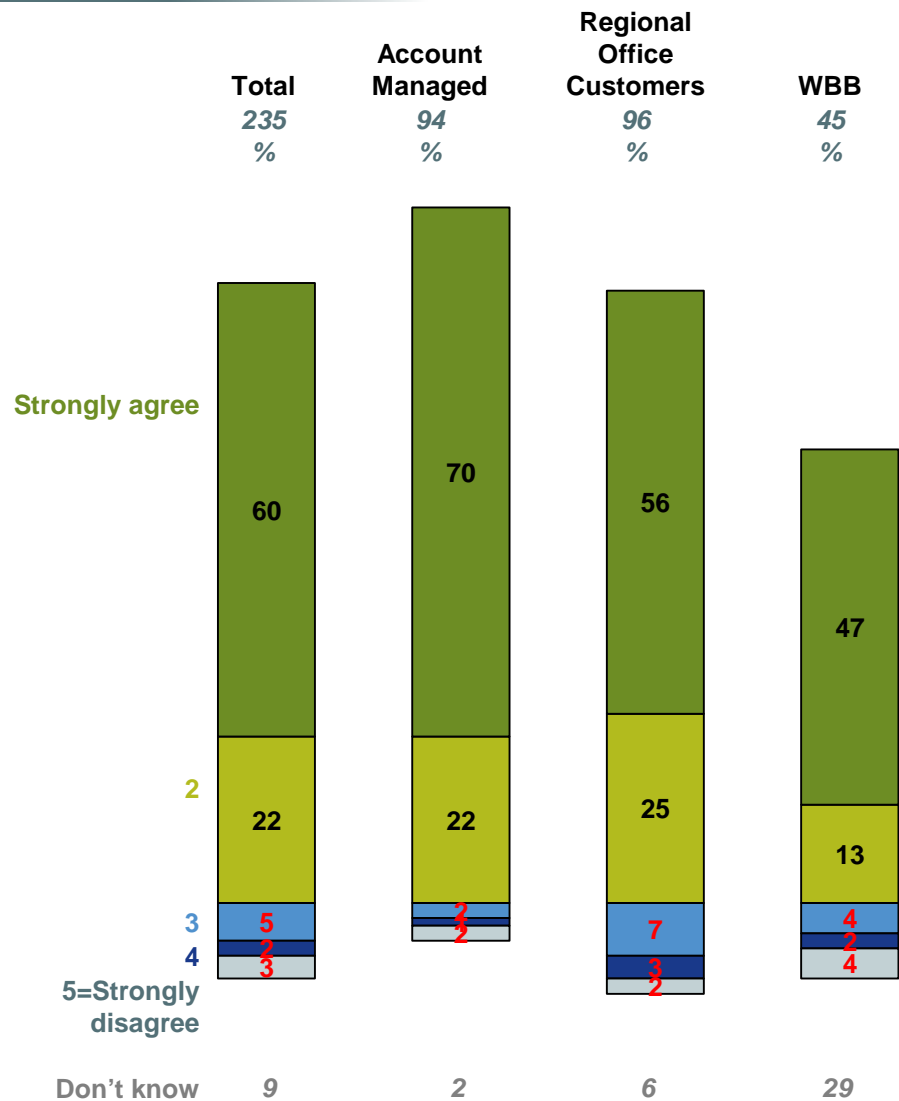


Using a scale from 1 to 5, where 1 means 'strongly agree' and 5 means 'strongly disagree', to what extent do you agree or disagree that Invest NI ...? [Base: 235 Apr-Jun '16 (94 Account Managed, 96 Regional Office Customers and 45 WBB)]

Key Performance Indicator – Process Management

‘Completed activities according to the agreed timeline’

*Small Bases = less than 50

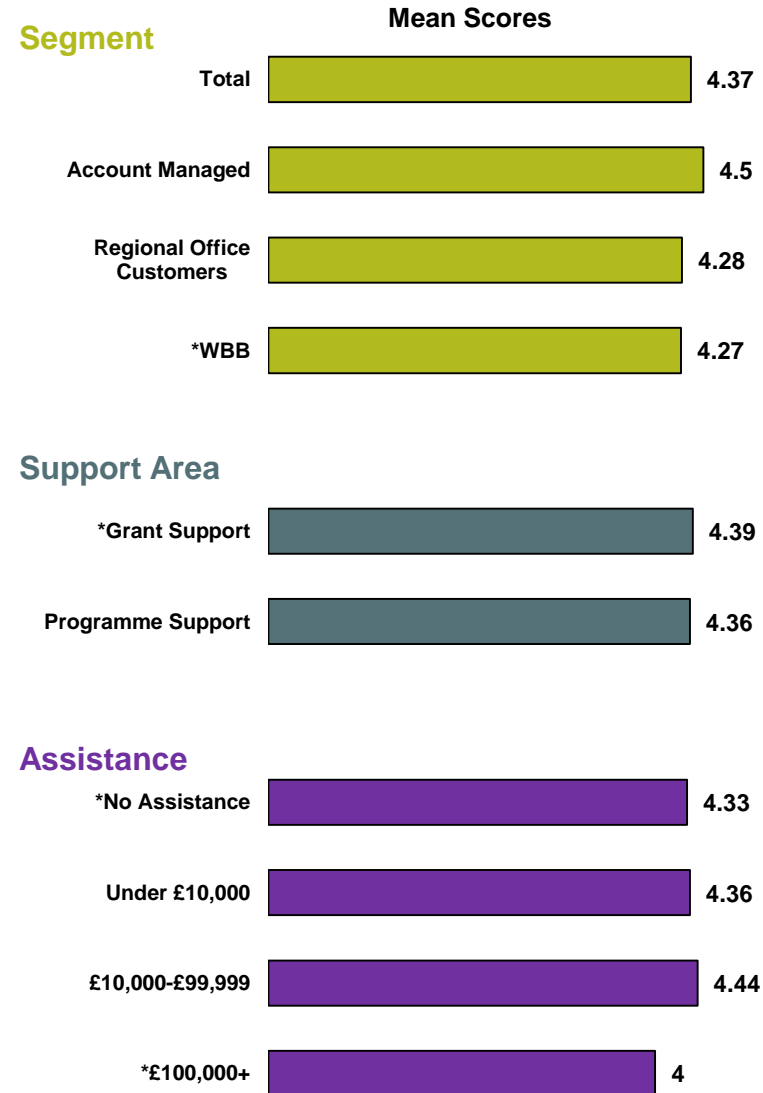
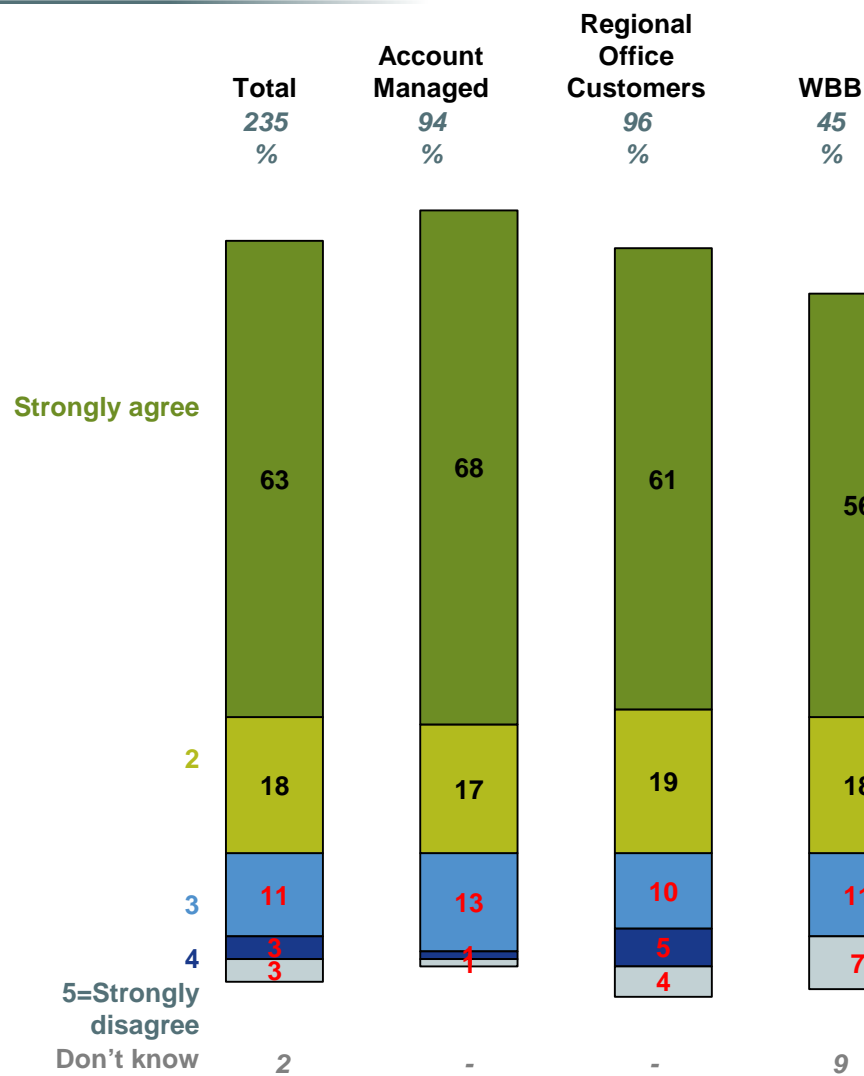


Using a scale from 1 to 5, where 1 means 'strongly agree' and 5 means 'strongly disagree', to what extent do you agree or disagree that Invest NI ...? [Base: 235 Apr-Jun '16 (94 Account Managed, 96 Regional Office Customers and 45 WBB)]

Key Performance Indicator – Process Management

‘Was proactive in providing advice and support’

**Small Bases = less than 50*

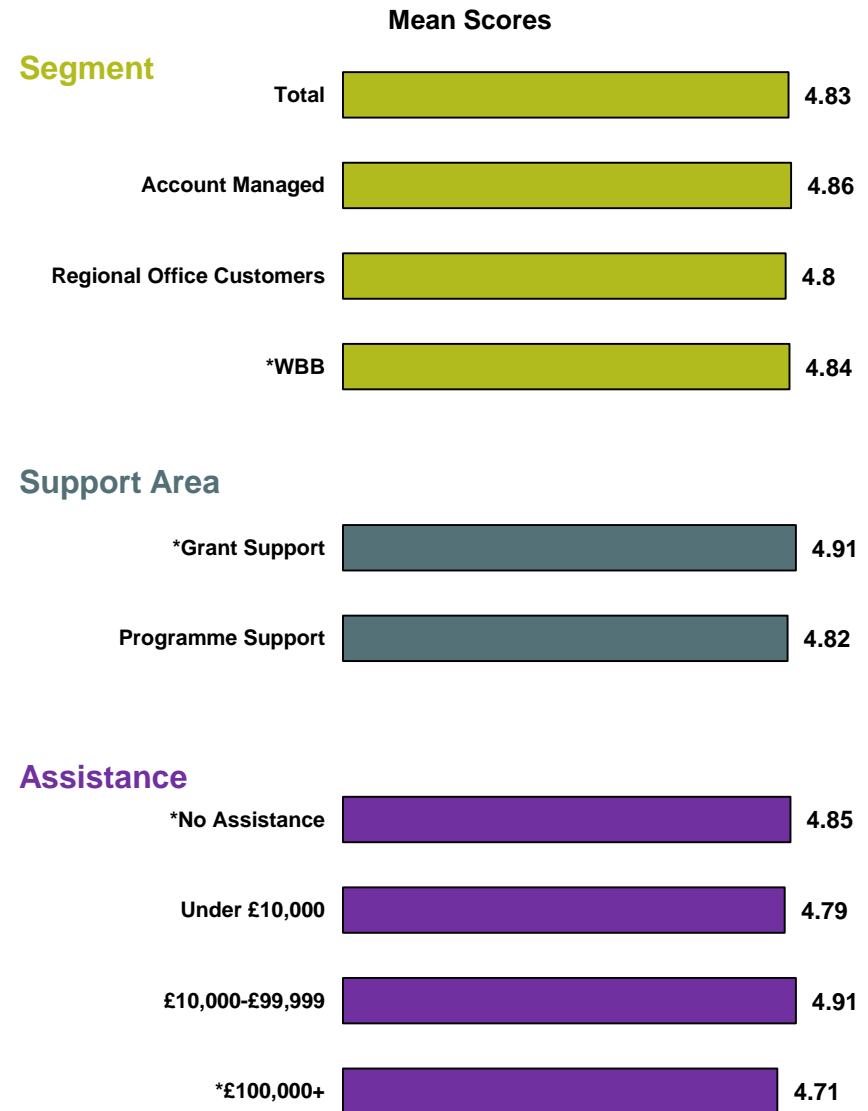
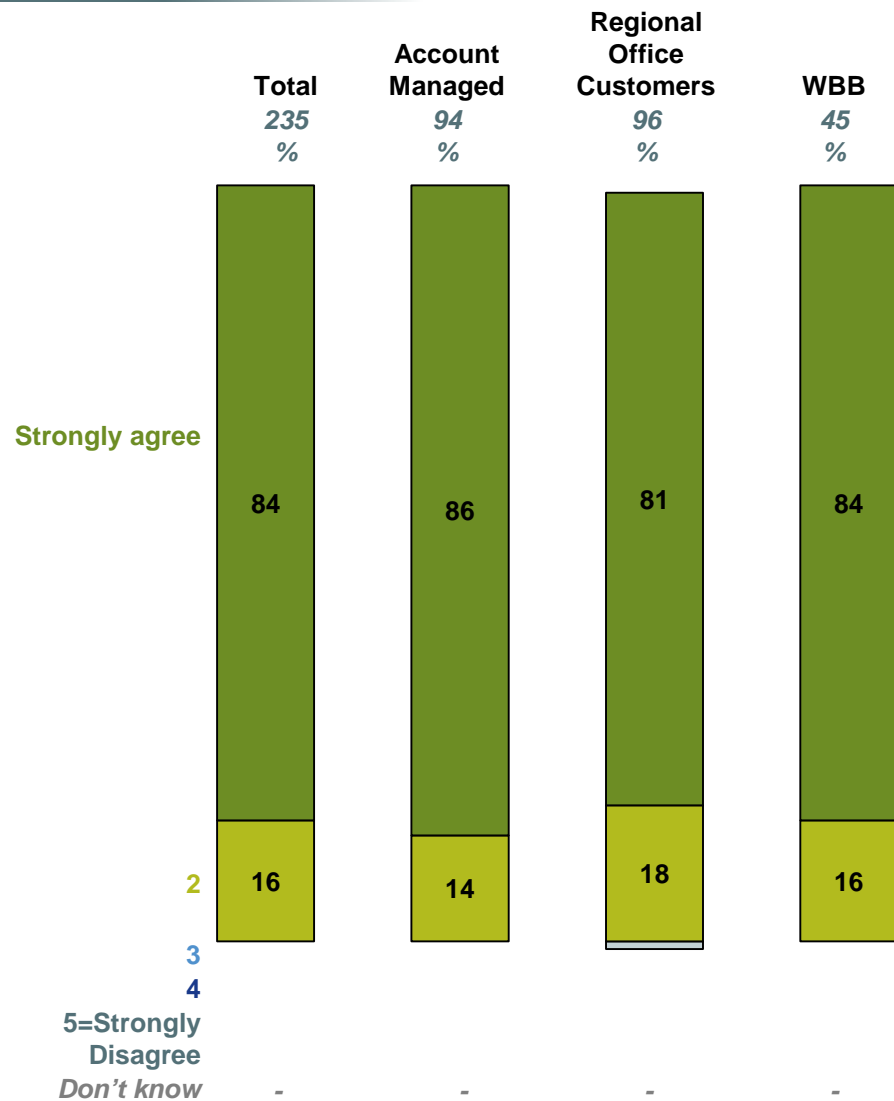


Using a scale from 1 to 5, where 1 means 'strongly agree' and 5 means 'strongly disagree', to what extent do you agree or disagree that Invest NI ...? [Base: 235 Apr-Jun '16 (94 Account Managed, 96 Regional Office Customers and 45 WBB)]

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: 235 Apr-Jun '16 (94 Account Managed, 96 Regional Office Customers and 45 WBB)]

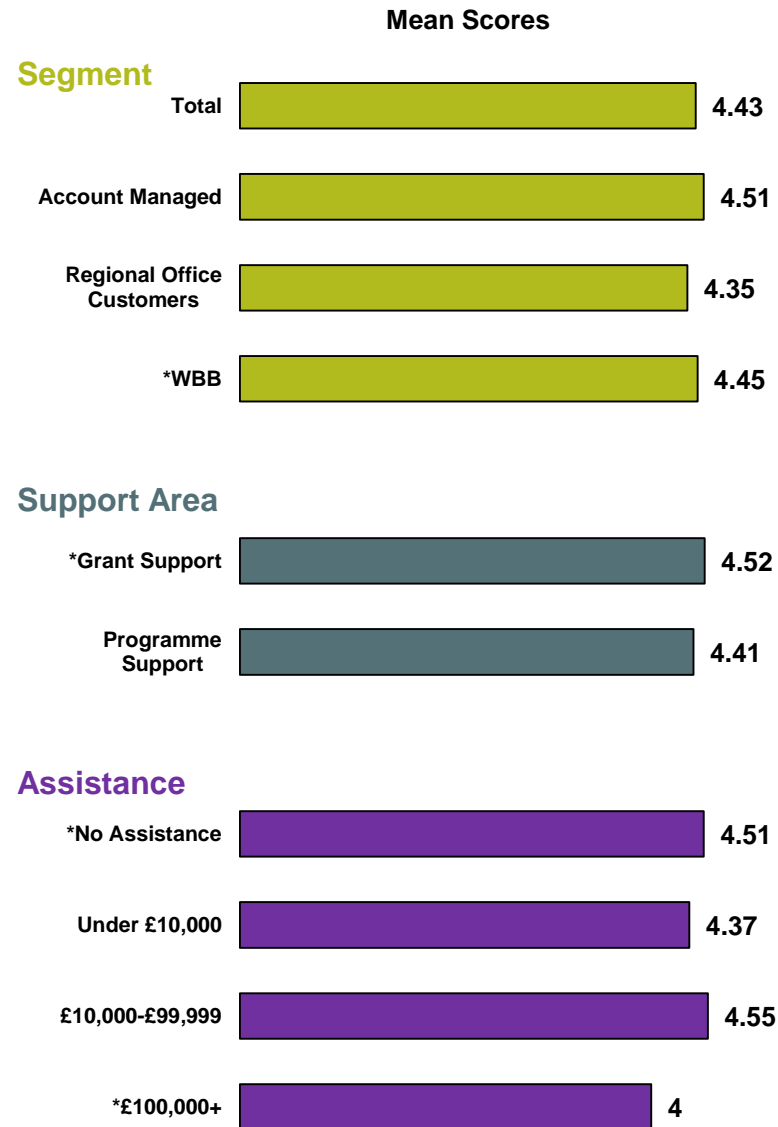
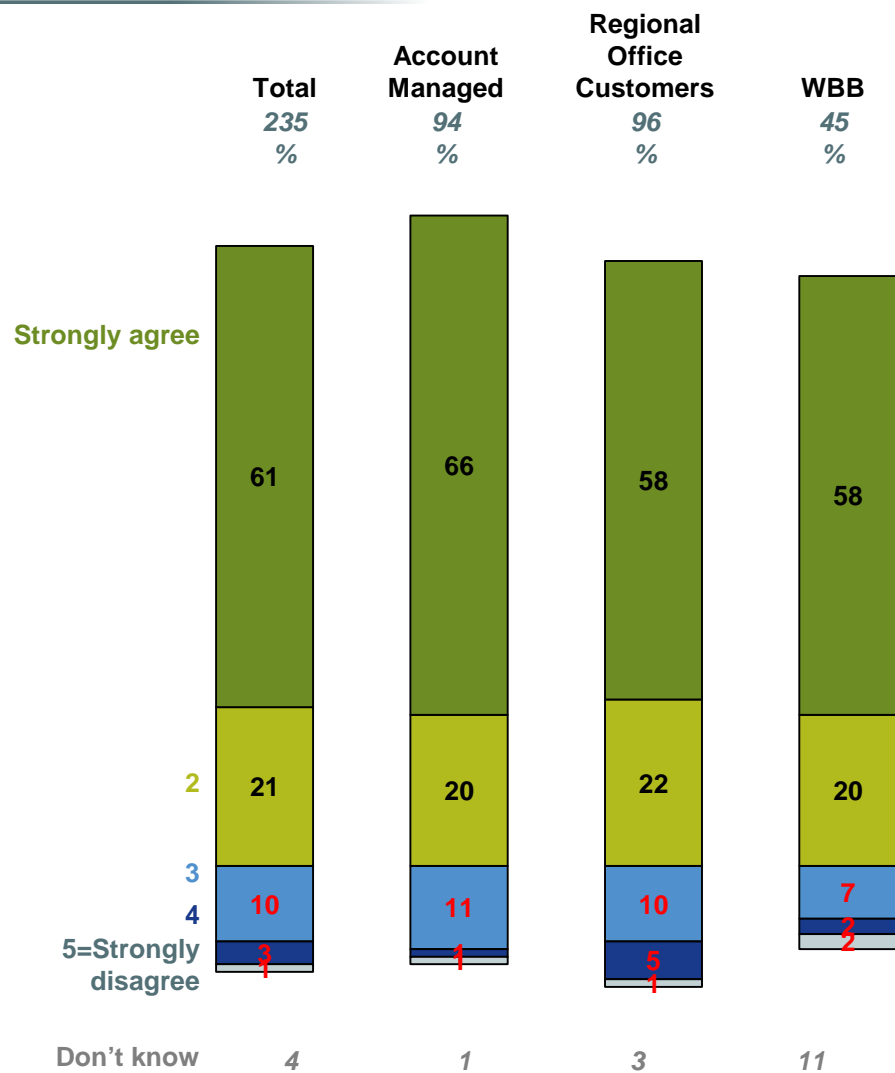
PROCESS COMMUNICATION



Key Performance Indicator – Process Communication

‘Kept you informed of progress throughout the process’

*Small Bases = less than 50

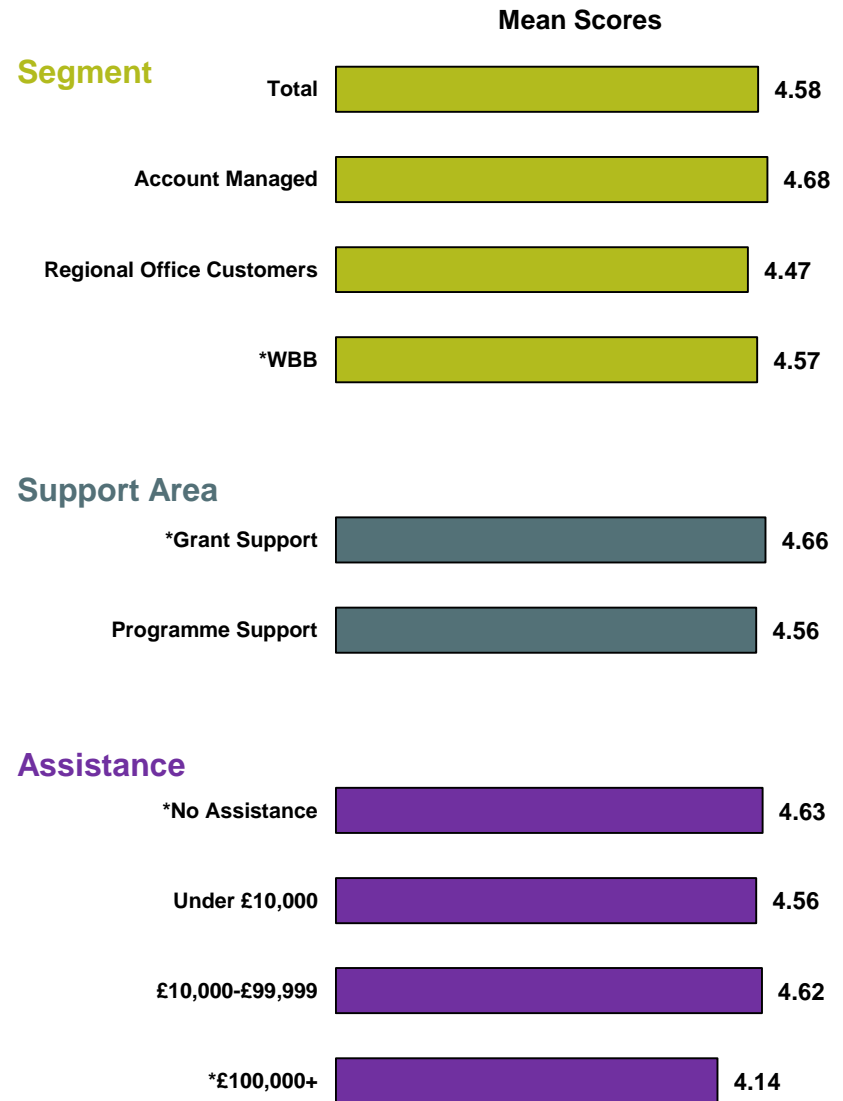
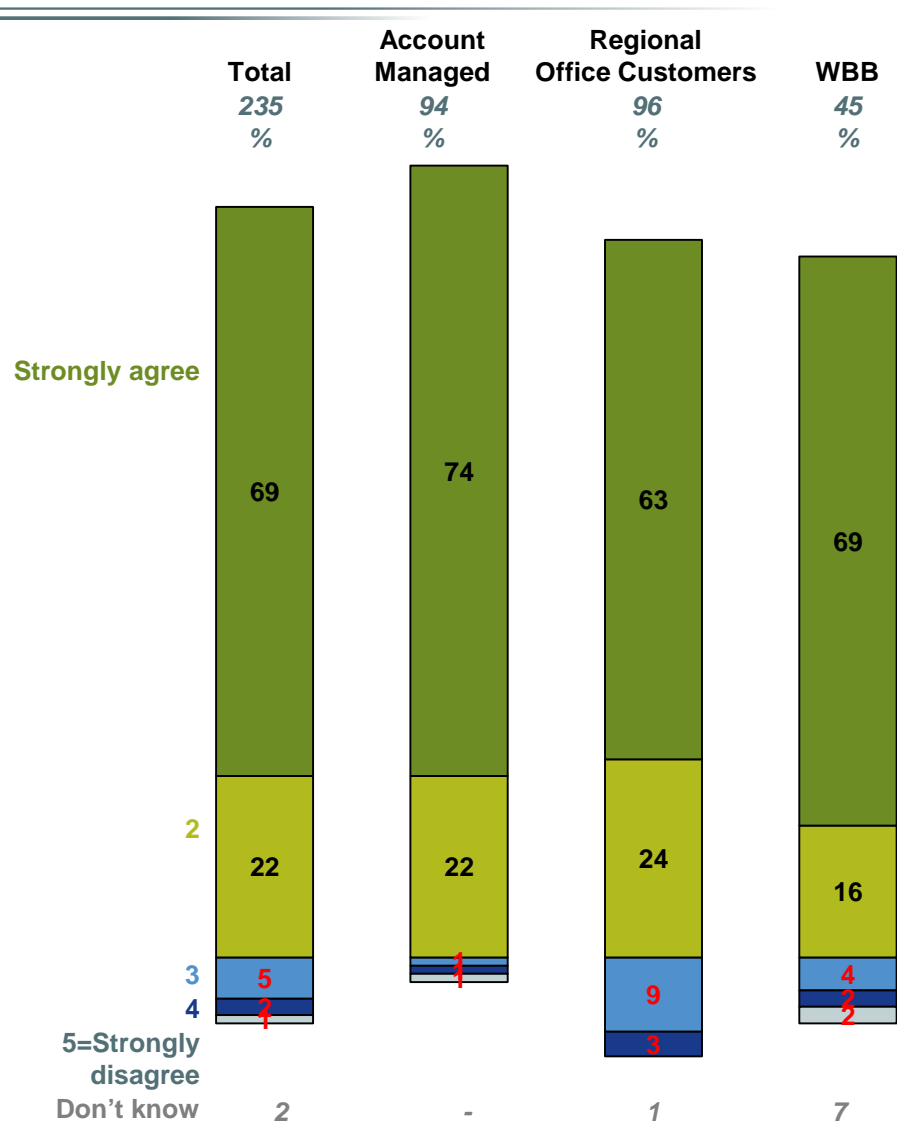


Using a scale from 1 to 5, where 1 means 'strongly agree' and 5 means 'strongly disagree', to what extent do you agree or disagree that Invest NI ...? [Base: 235 Apr-Jun '16 (94 Account Managed, 96 Regional Office Customers and 45 WBB)]

Key Performance Indicator – Process Communication

‘Responded to your queries within a reasonable timeframe’

**Small Bases = less than 50*

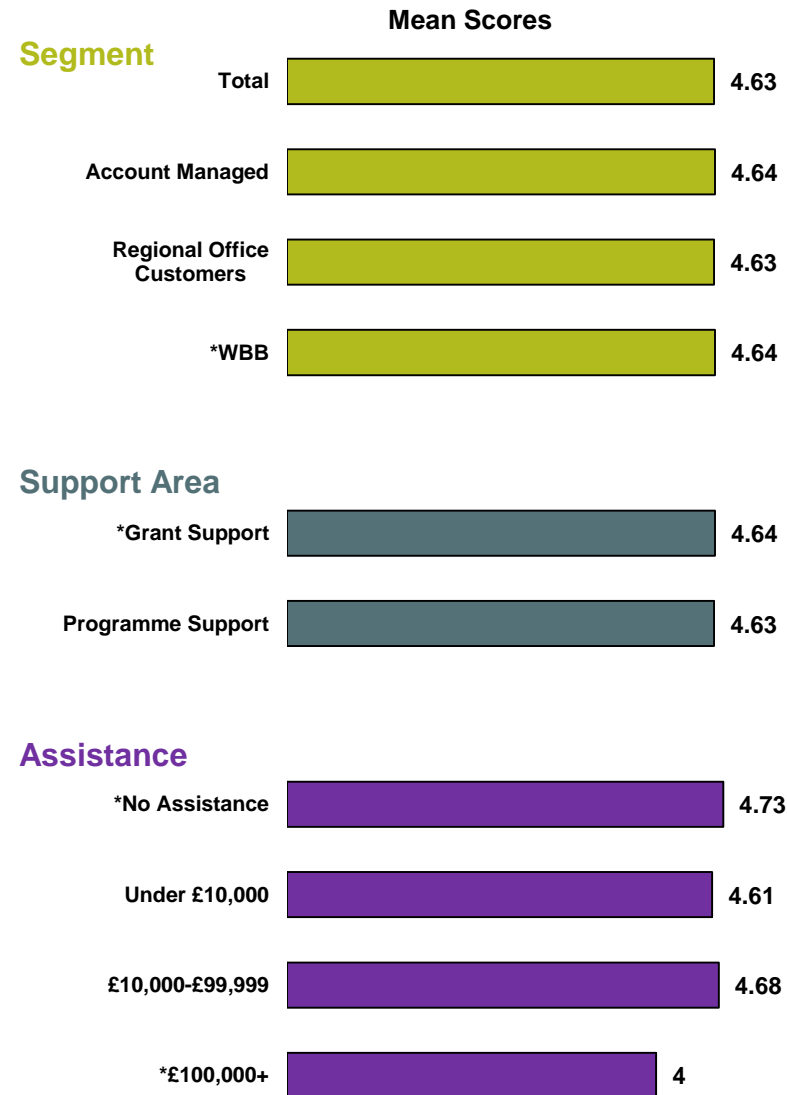
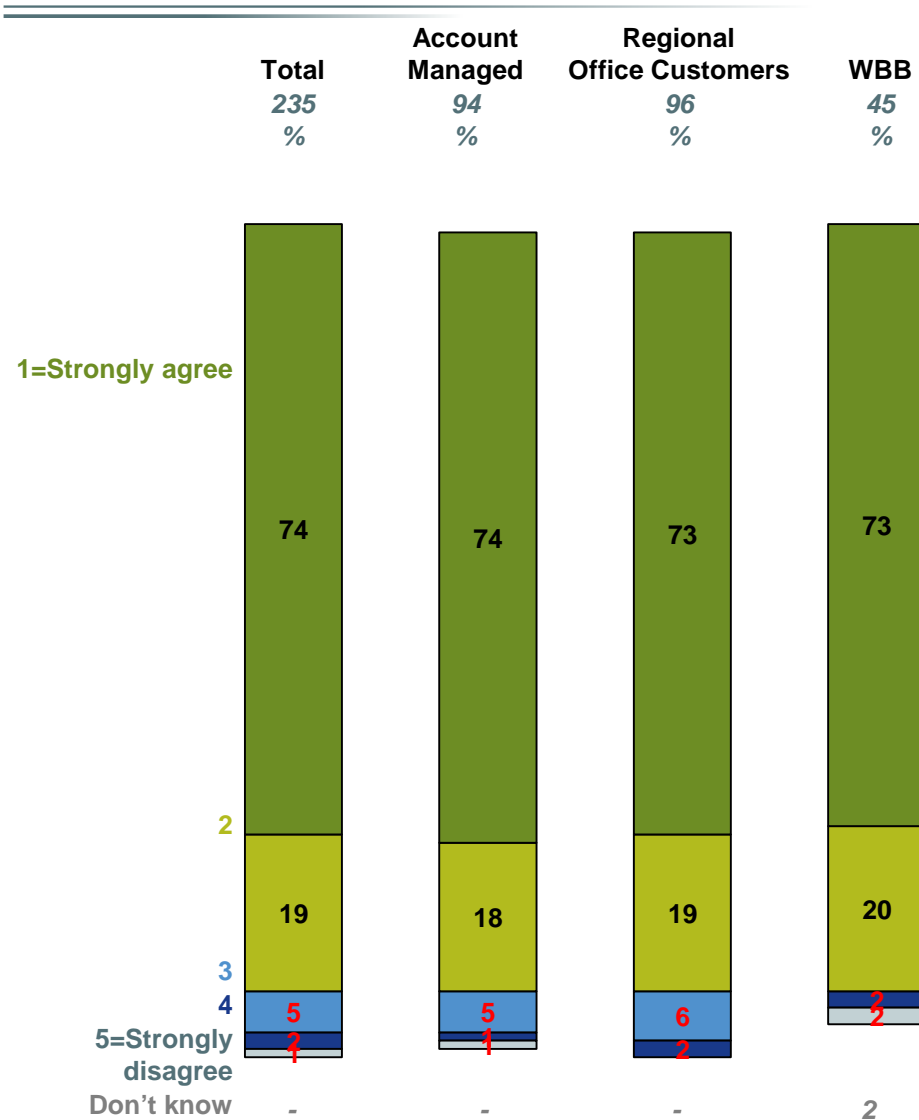


Using a scale from 1 to 5, where 1 means 'strongly agree' and 5 means 'strongly disagree', to what extent do you agree or disagree that Invest NI ...? [Base: 235 Apr-Jun '16 (94 Account Managed, 96 Regional Office Customers and 45 WBB)]

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: 235 Apr-Jun '16 (94 Account Managed, 96 Regional Office Customers and 45 WBB)]

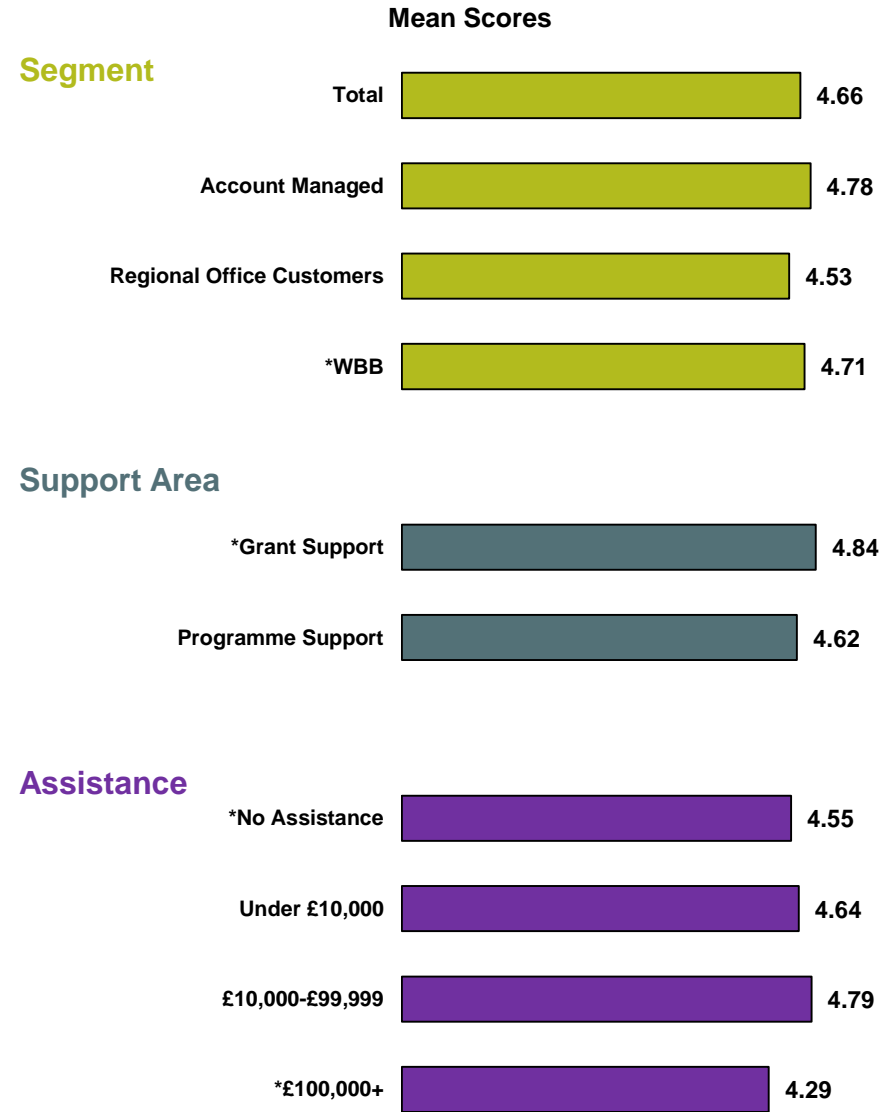
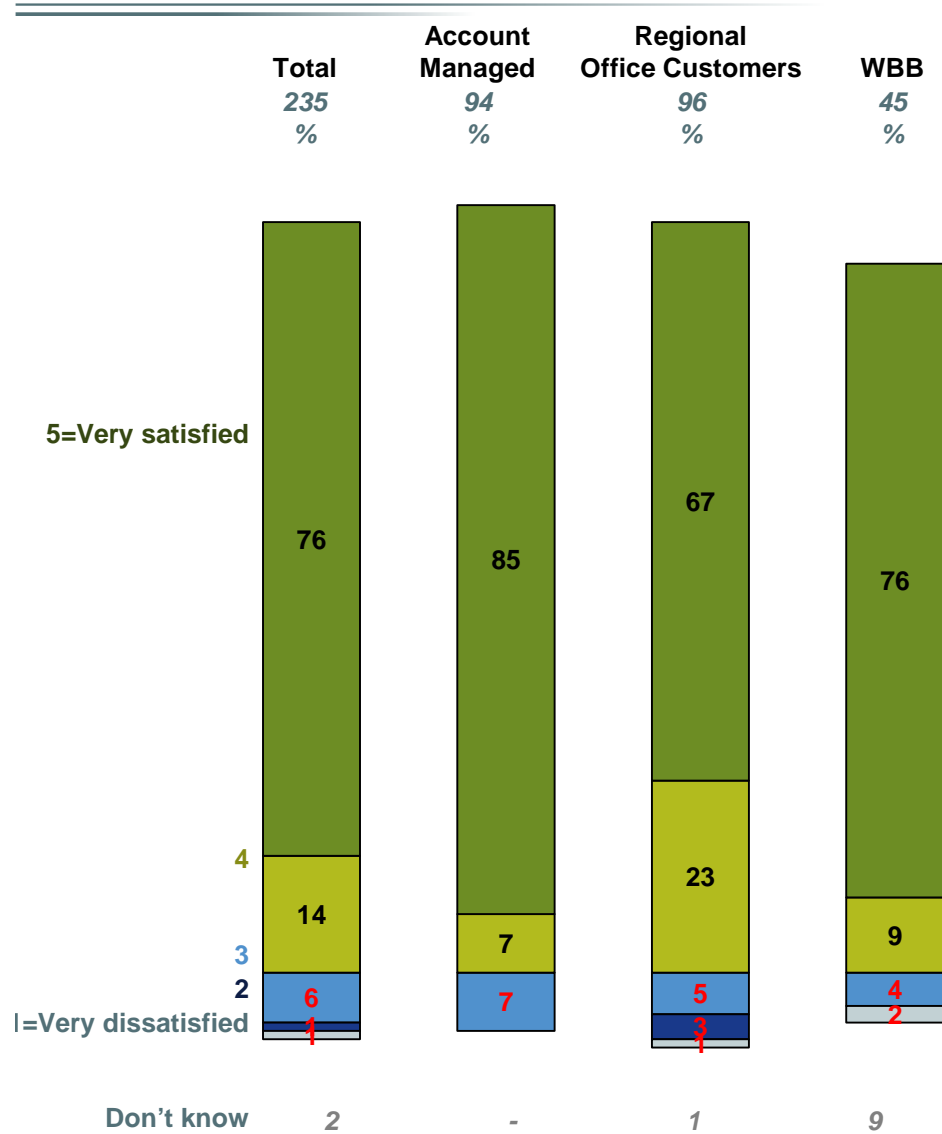
PEOPLE



Key Performance Indicator – People

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

*Small Bases = less than 50

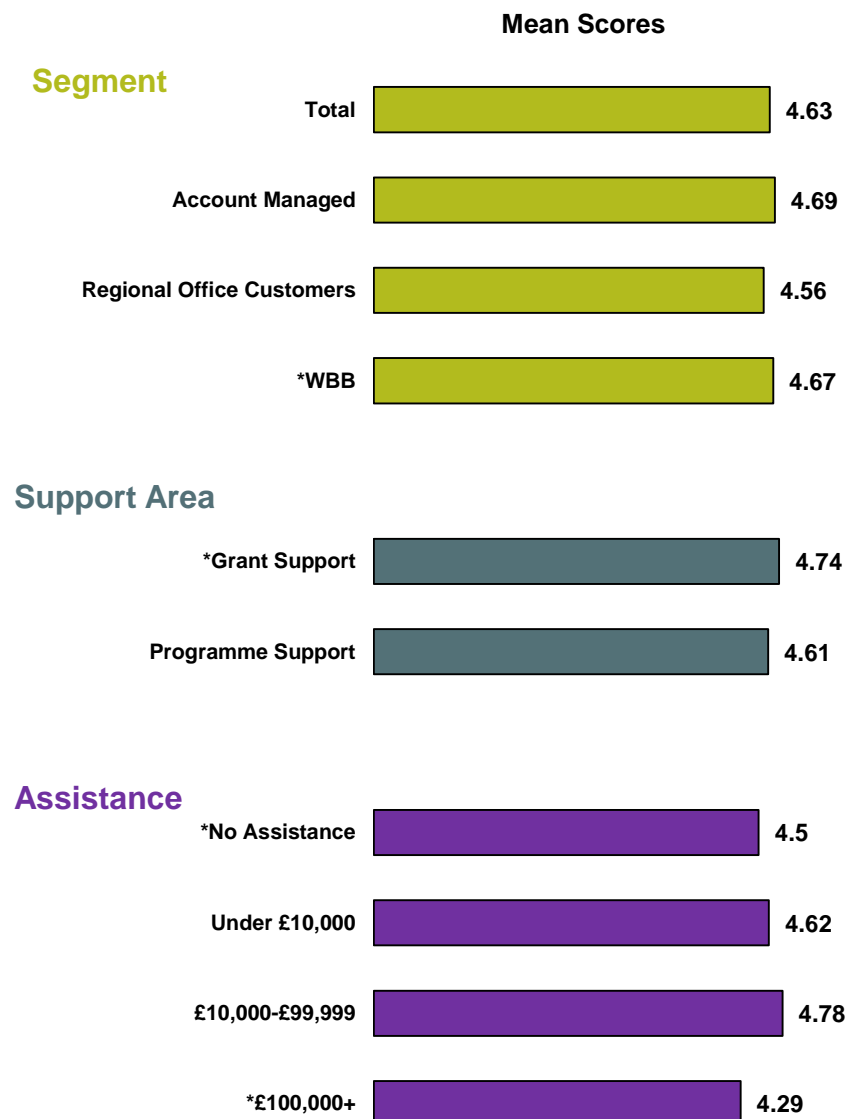
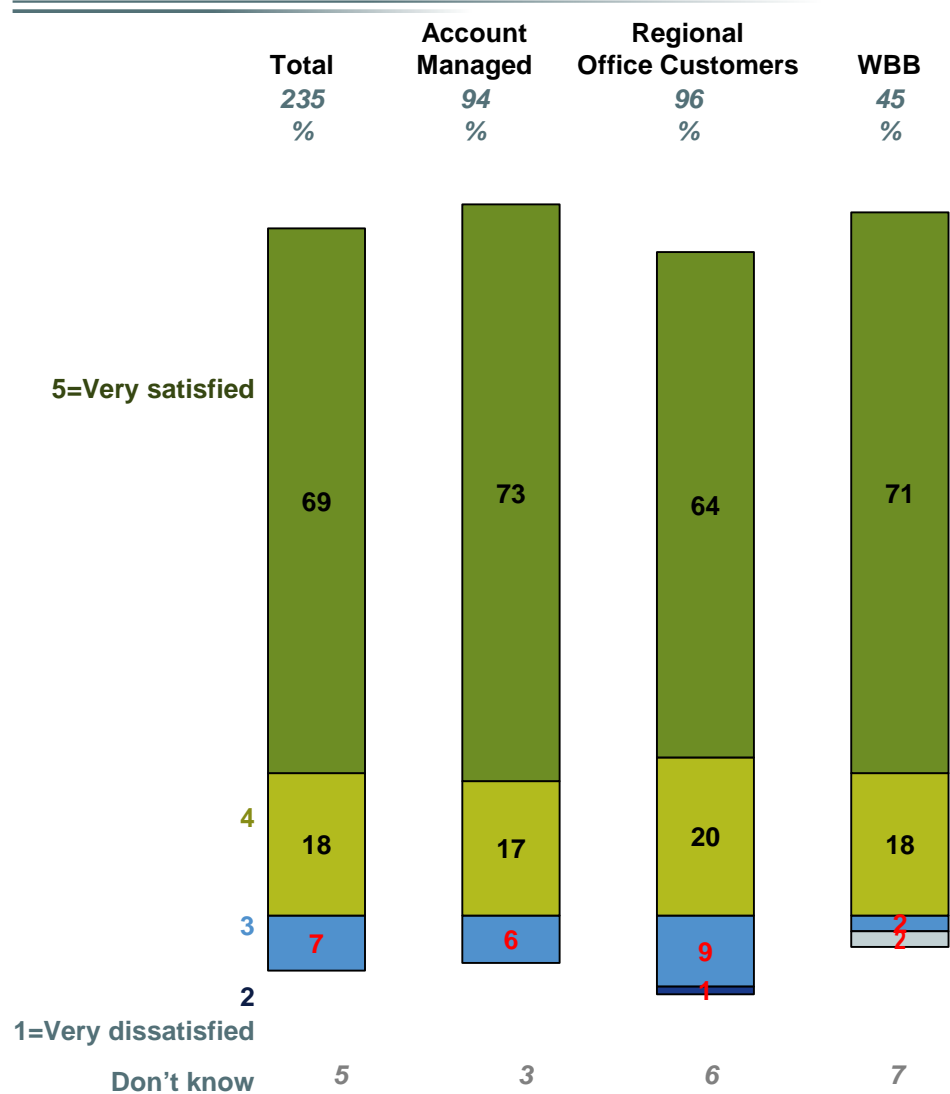


Using a scale from 1 to 5, where 1 means 'strongly agree' and 5 means 'strongly disagree', to what extent do you agree or disagree that Invest NI ...? [Base: 235 Apr-Jun '16 (94 Account Managed, 96 Regional Office Customers and 45 WBB)]

Key Performance Indicator – Process Communication

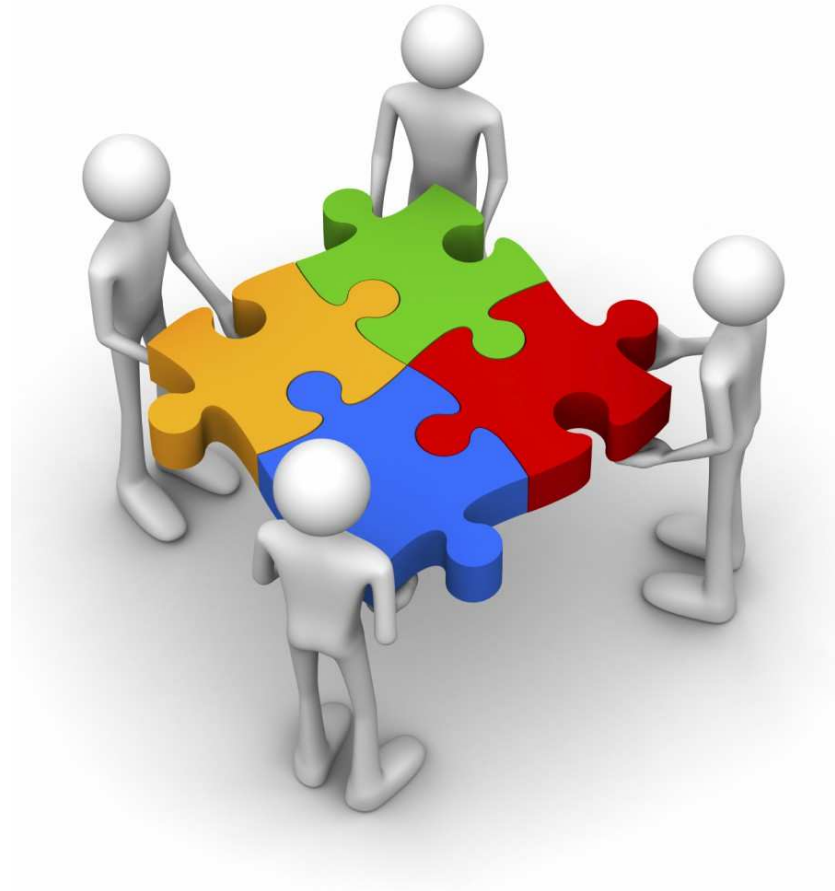
‘Level of satisfaction that the team of people you worked with from Invest NI provided a seamless approach to your business during this engagement’

*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: 235 Apr-Jun '16 (94 Account Managed, 96 Regional Office Customers and 45 WBB)]

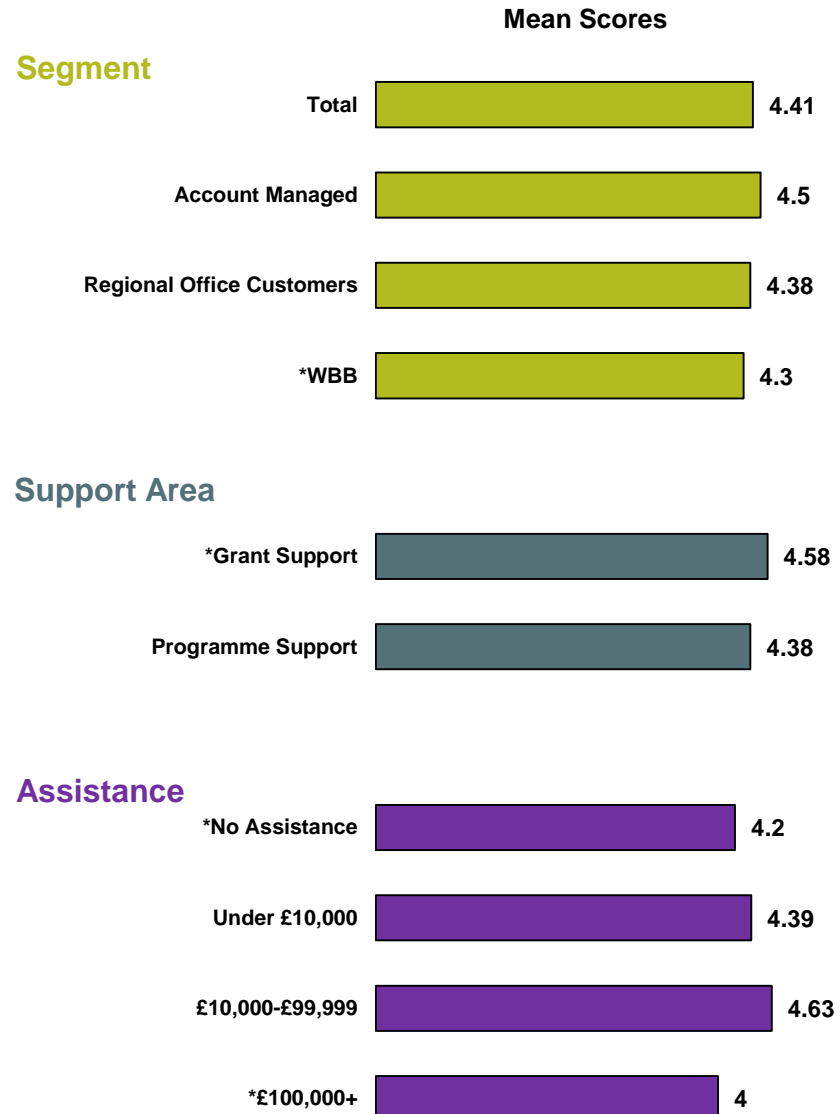
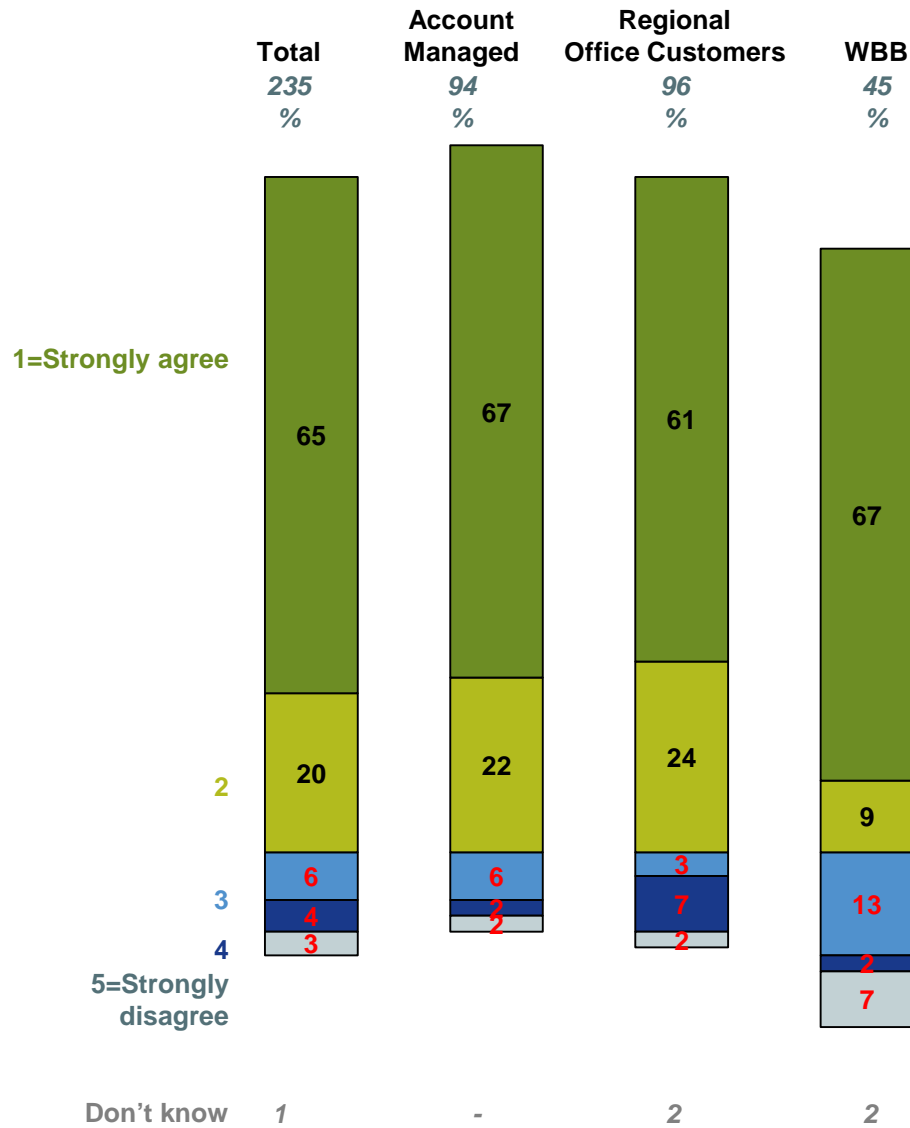
PERFORMANCE



Key Performance Indicator – Performance

'The Invest NI team is helping to develop my business'

*Small Bases = less than 50

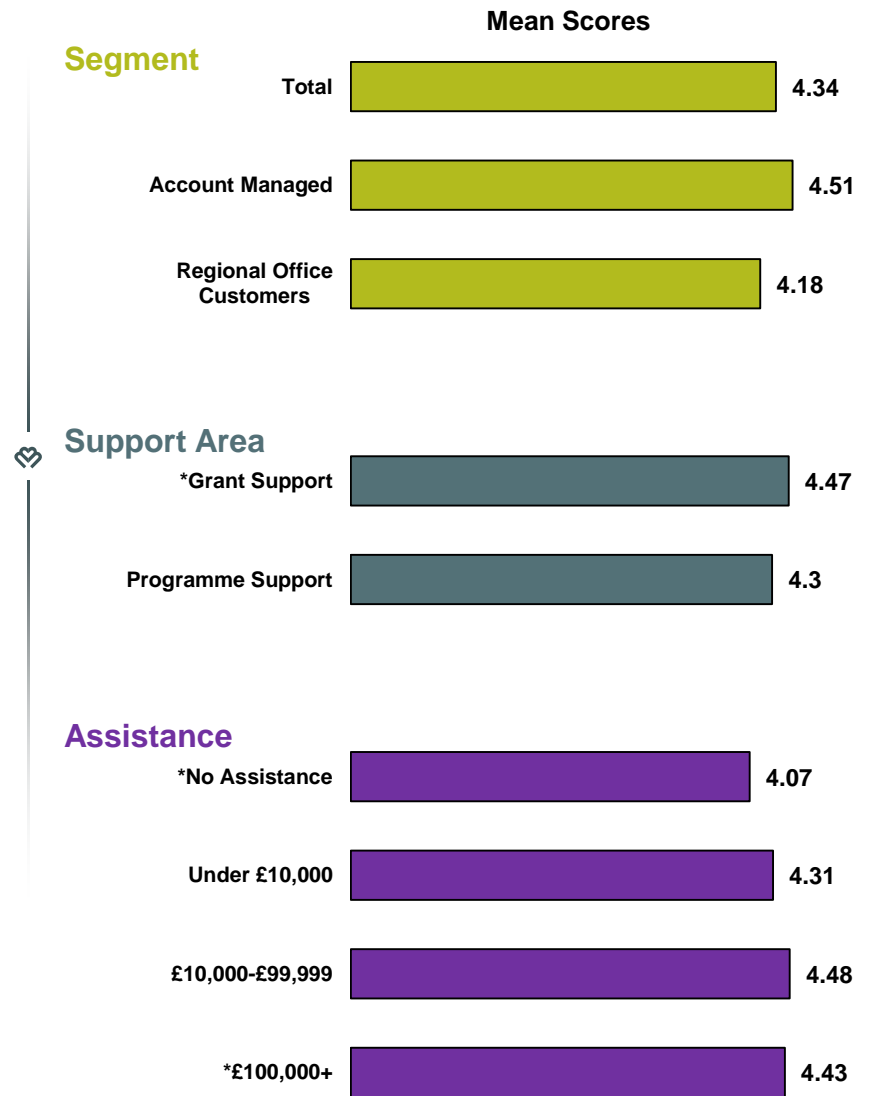
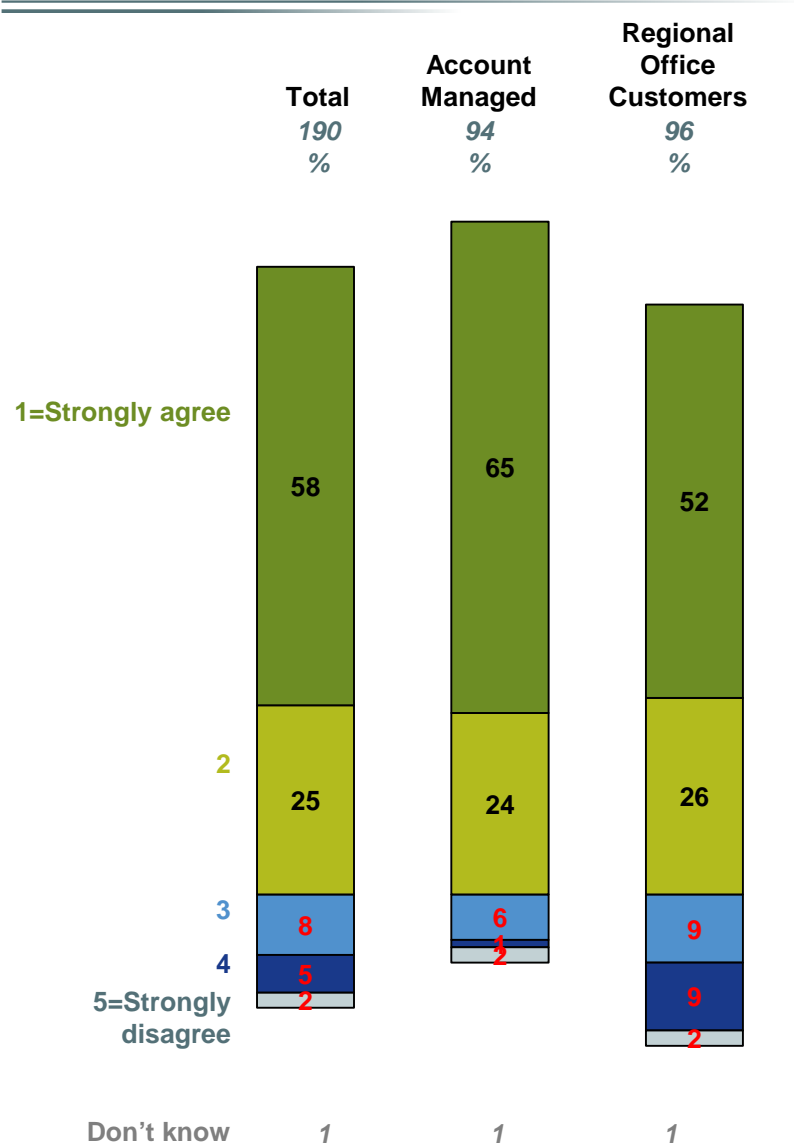


Using a scale from 1 to 5, where 1 means 'strongly agree' and 5 means 'strongly disagree', to what extent do you agree or disagree that Invest NI ...? [Base: 235 Apr-Jun '16 (94 Account Managed, 96 Regional Office Customers and 45 WBB)]

Key Performance Indicator – Performance

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

*Small Bases = less than 50

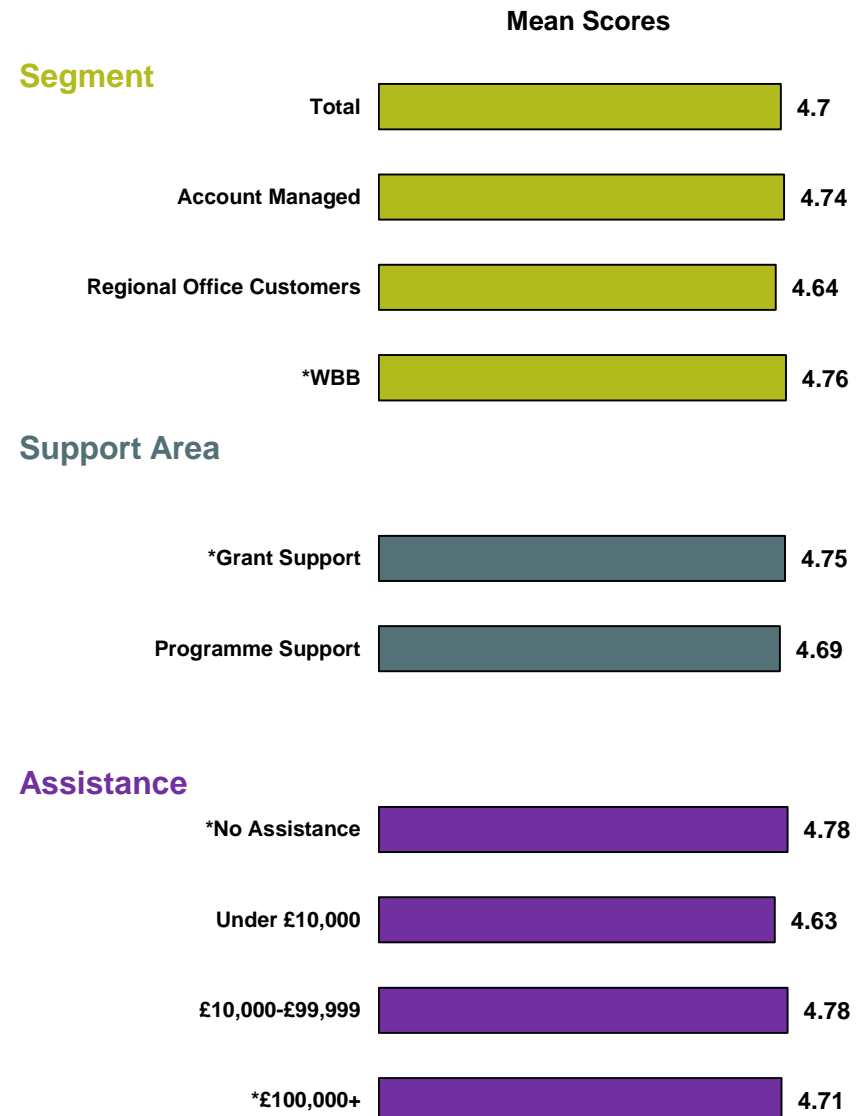
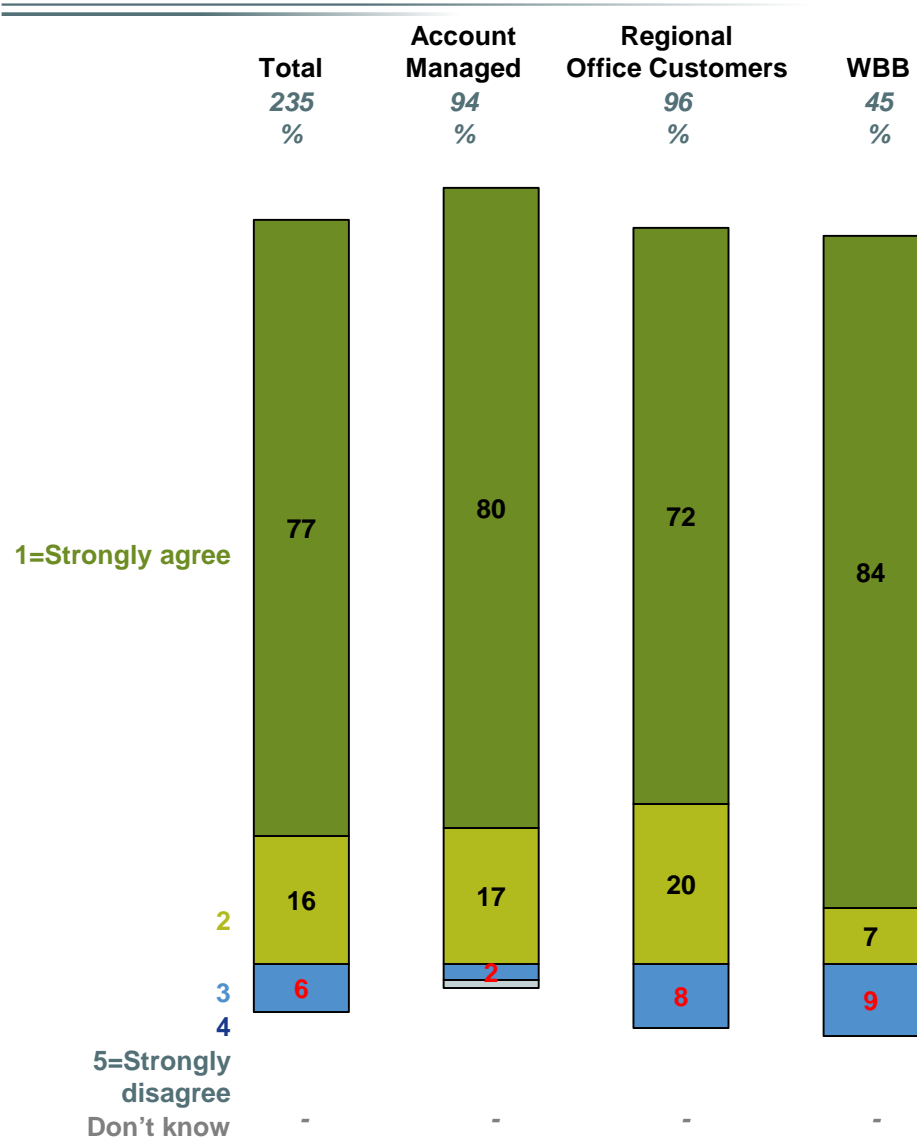


Using a scale from 1 to 5, where 1 means 'strongly agree' and 5 means 'strongly disagree', to what extent do you agree or disagree that Invest NI ...? [Base: 190 Apr-Jun '16 (94 Account Managed and 96 Regional Office Customers)]

Key Performance Indicator – Performance

‘Invest NI acts with professionalism and integrity’

**Small Bases = less than 50*

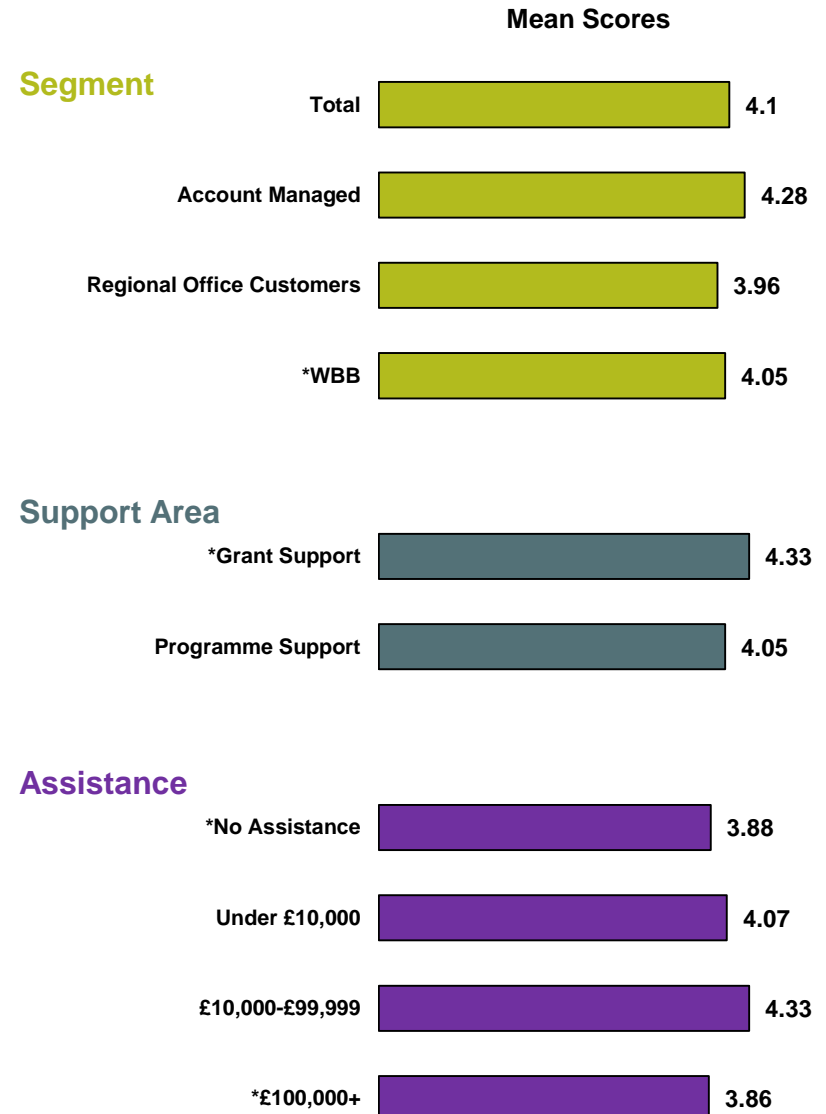
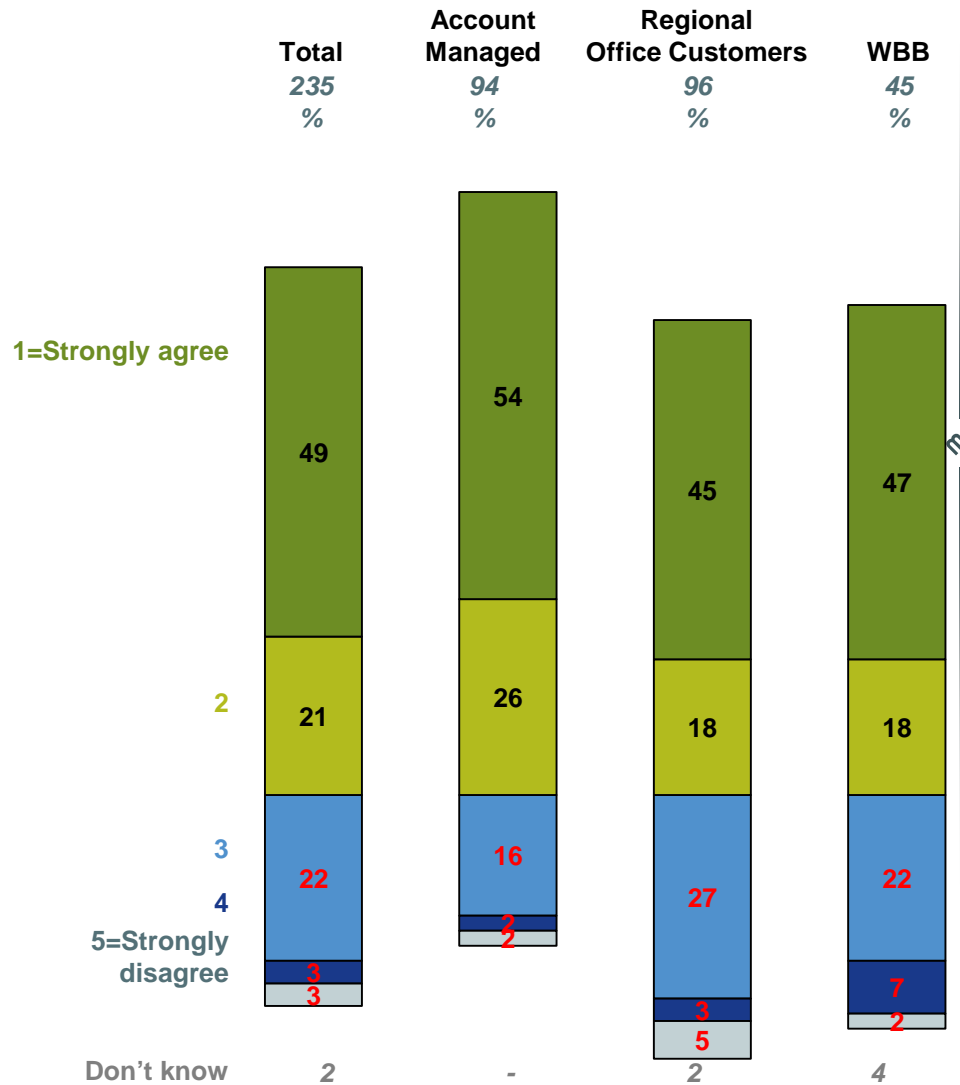


Using a scale from 1 to 5, where 1 means 'strongly agree' and 5 means 'strongly disagree', to what extent do you agree or disagree that Invest NI ...? [Base: 235 Apr-Jun '16 (94 Account Managed, 96 Regional Office Customers and 45 WBB)]

Key Performance Indicator – Performance

'Invest NI exceeded my expectations'

**Small Bases = less than 50*

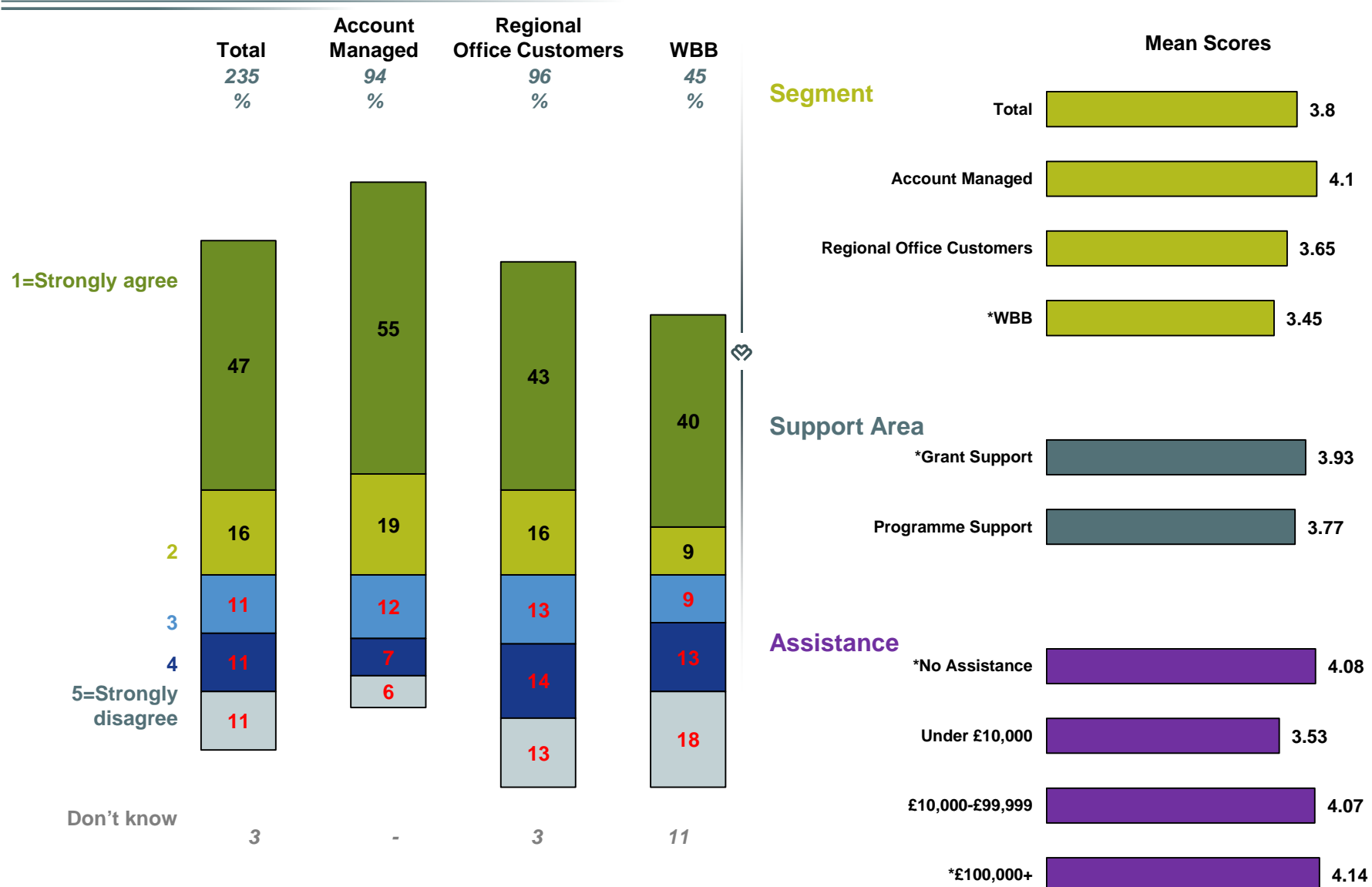


Using a scale from 1 to 5, where 1 means 'strongly agree' and 5 means 'strongly disagree', to what extent do you agree or disagree that Invest NI ...? [Base: 235 Apr-Jun '16 (94 Account Managed, 96 Regional Office Customers and 45 WBB)]

Key Performance Indicator – Performance

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

**Small Bases = less than 50*

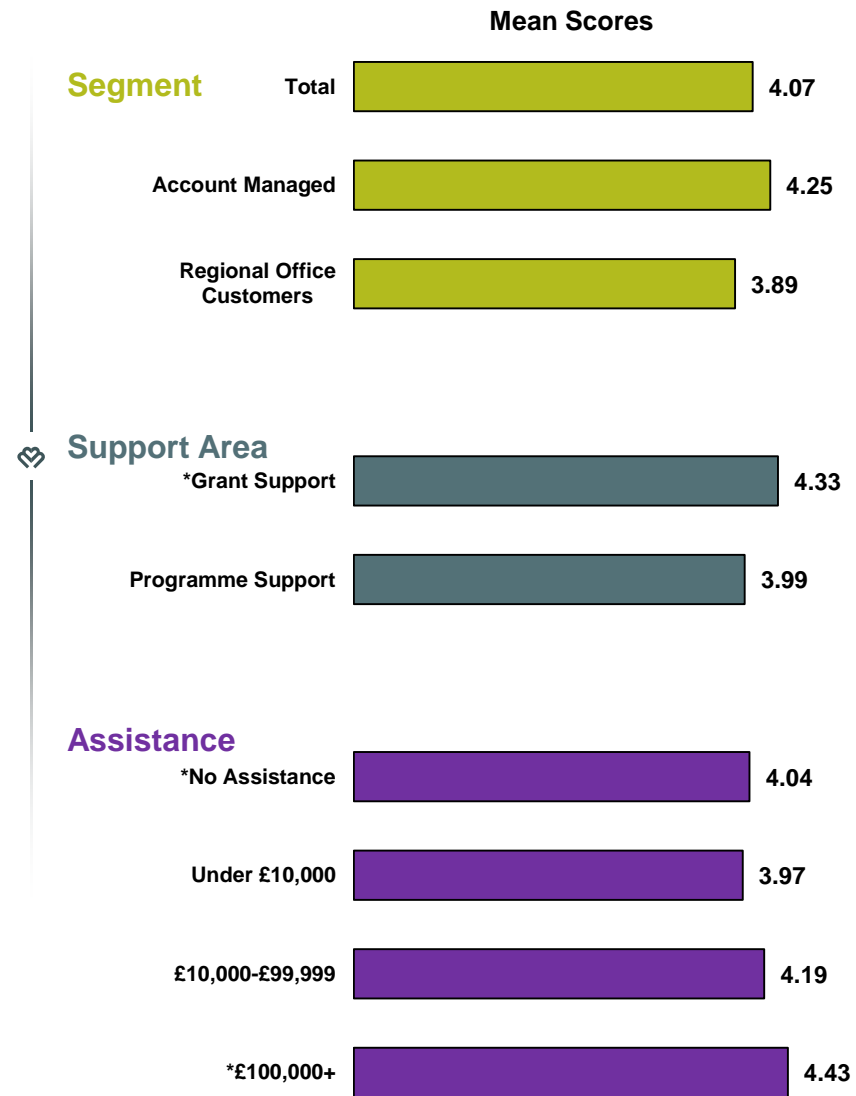
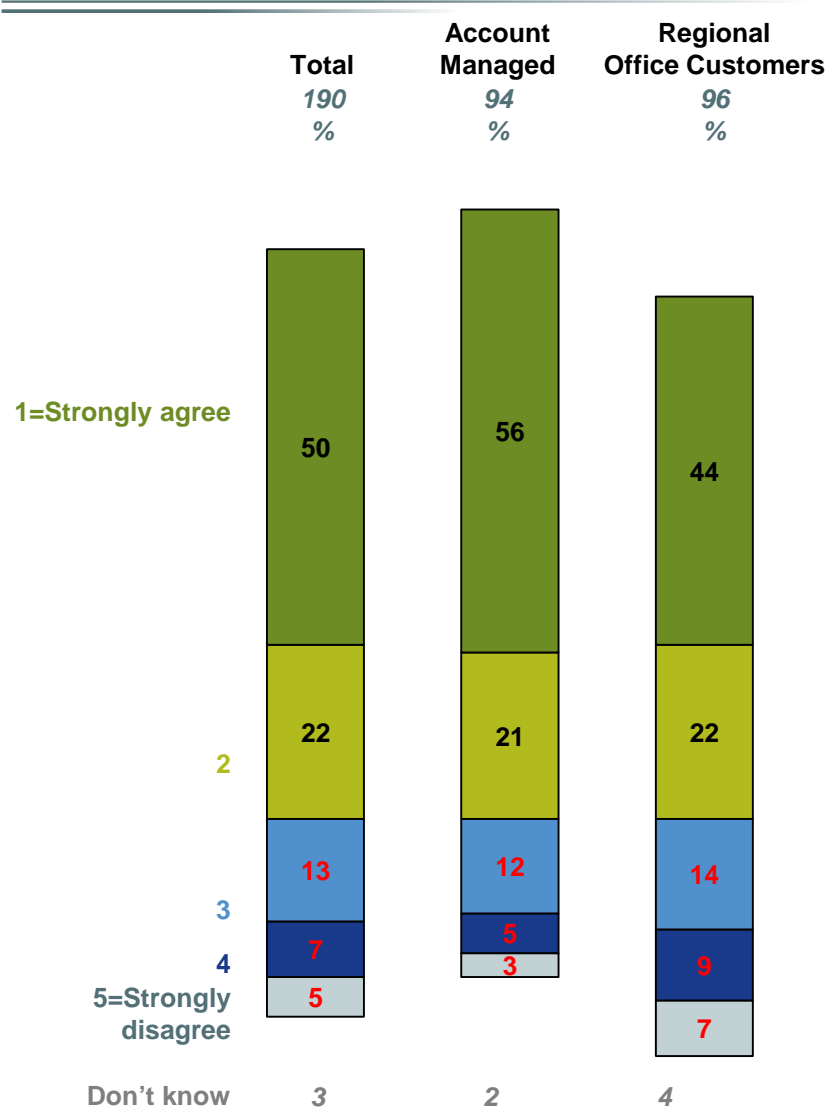


Using a scale from 1 to 5, where 1 means 'strongly agree' and 5 means 'strongly disagree', to what extent do you agree or disagree that Invest NI ...? [Base: 235 Apr-Jun '16 (94 Account Managed, 96 Regional Office Customers and 45 WBB)]

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'

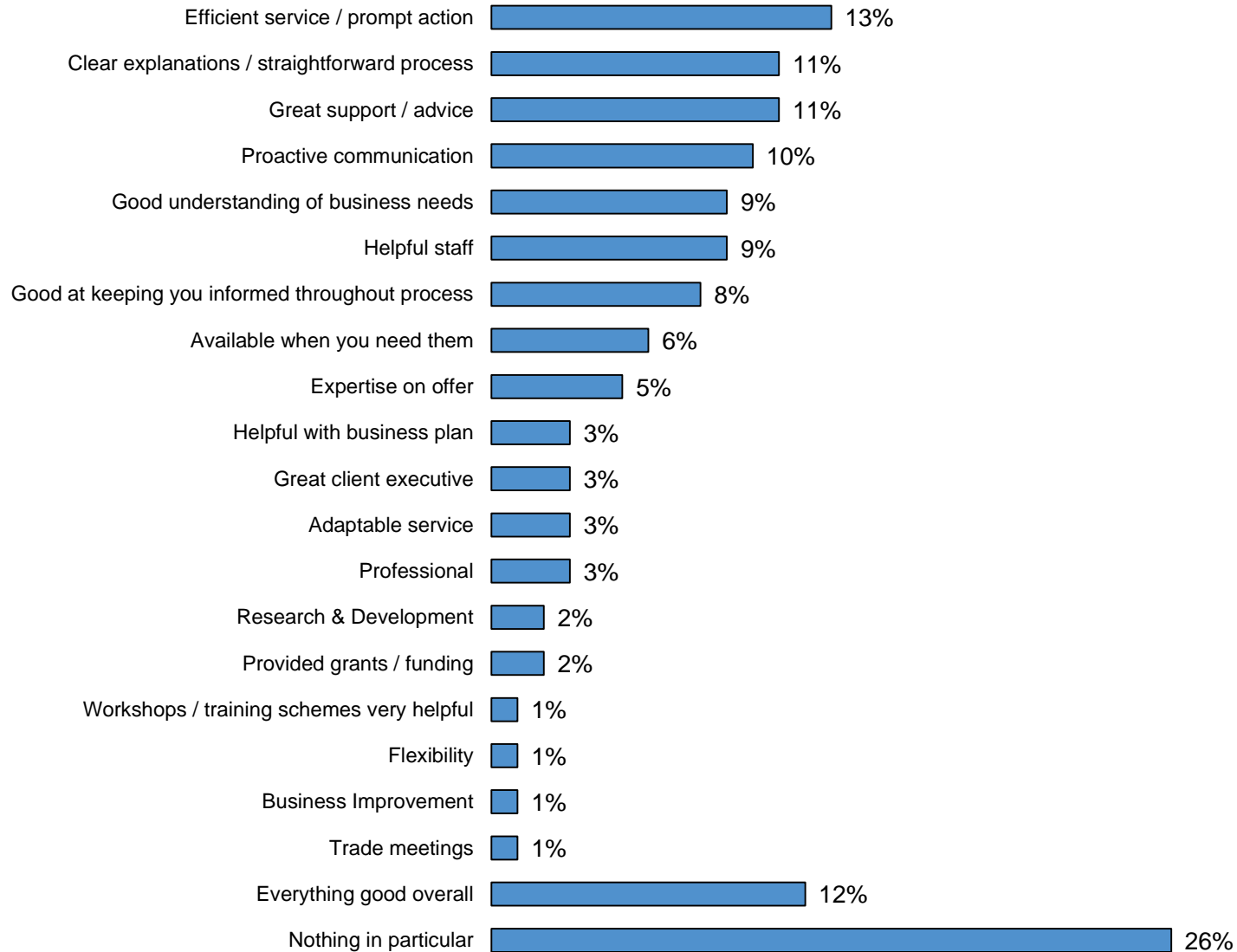
**Small Bases = less than 50*



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: 190 Apr-Jun '16 (94 Account Managed and 96 Regional Office Customers)]

Key Performance Indicator – Performance

‘What Invest NI did particularly well’

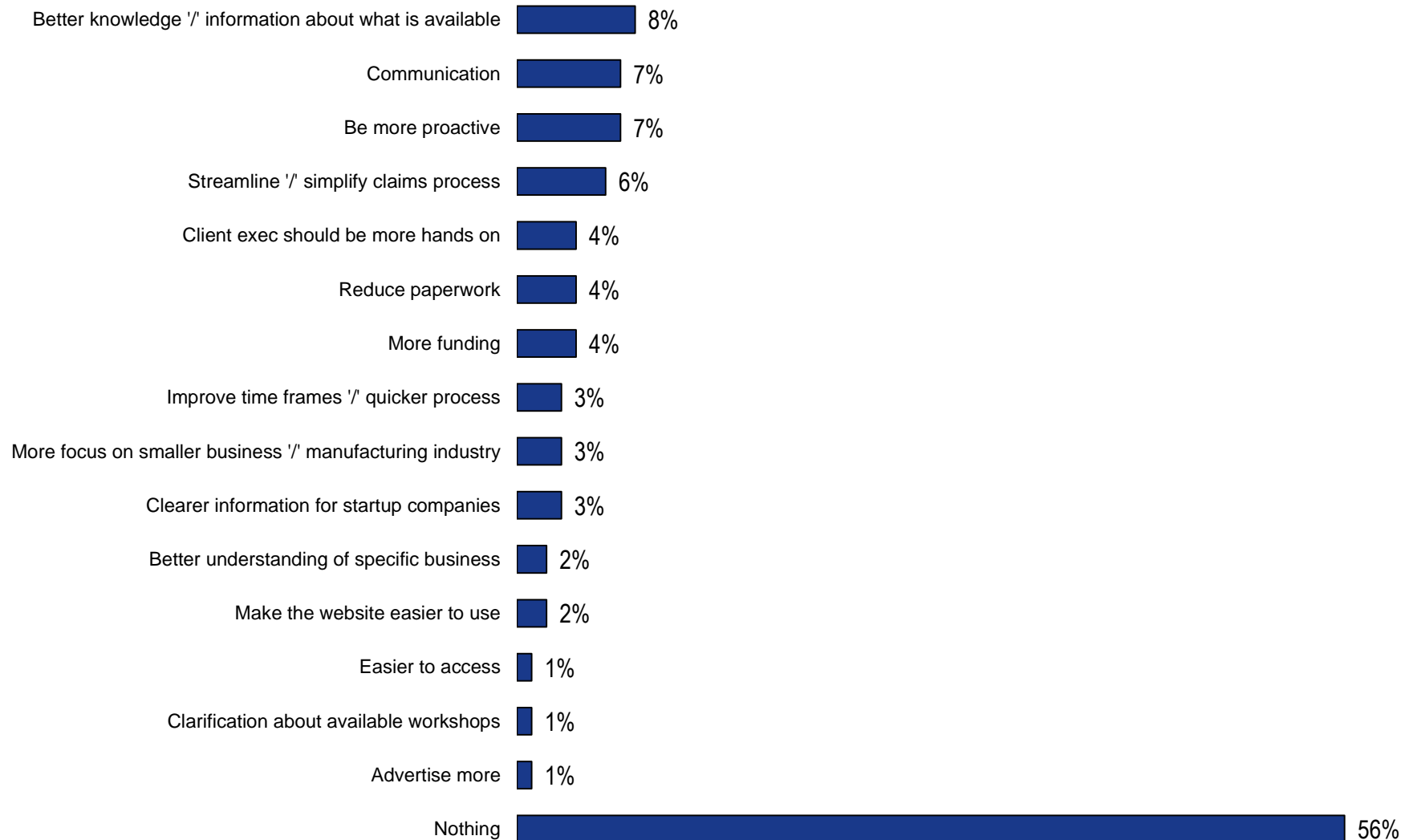


Is there anything that you think Invest NI did particularly well in the lead up to your offer of assistance?

[Base: Apr-Jun '16 (235 Customers & WBB in Receipt of Offer)]

Key Performance Indicator – Performance

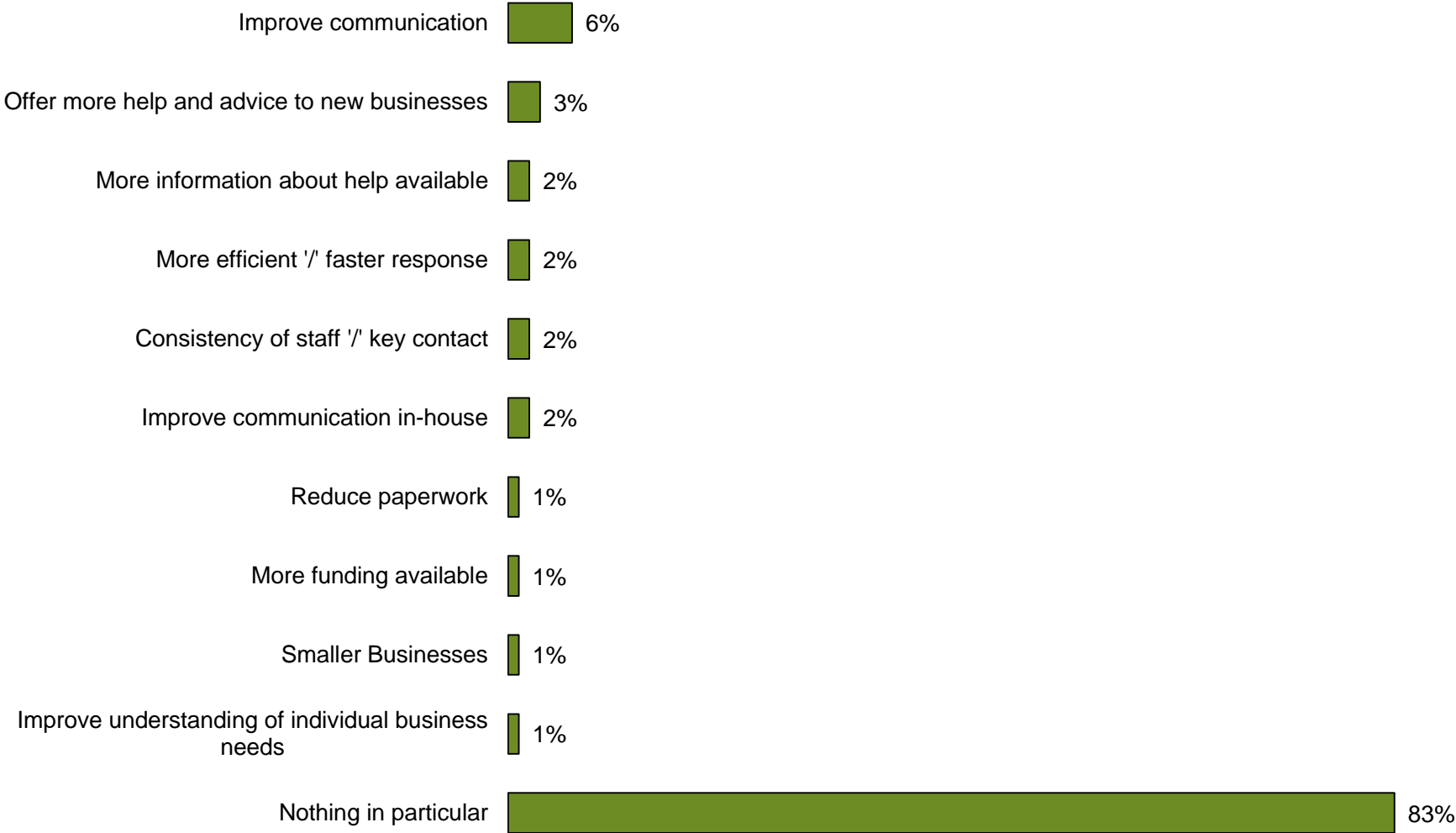
‘Anything organisation could do to improve the overall service they provide’



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: Apr-Jun '16 (235 Customers & WBB in Receipt of Offer)]

Key Performance Indicator – Performance

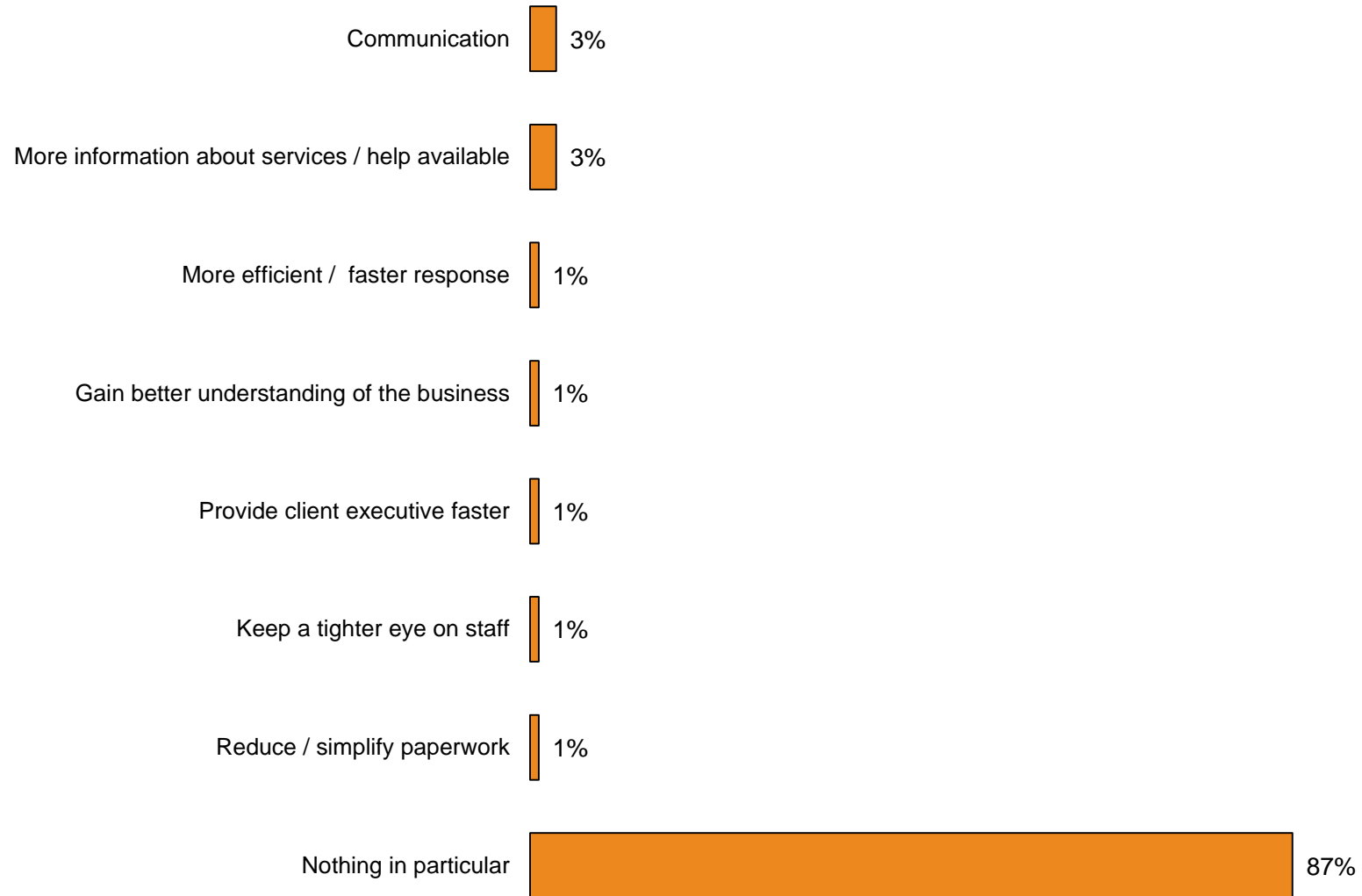
‘Anything organisation could have done better’



Thinking about your recent personal experience of Invest NI is there anything you think the organisation could have done better?
[Base: Apr-Jun '16 (235 Customers & WBB in Receipt of Offer)]

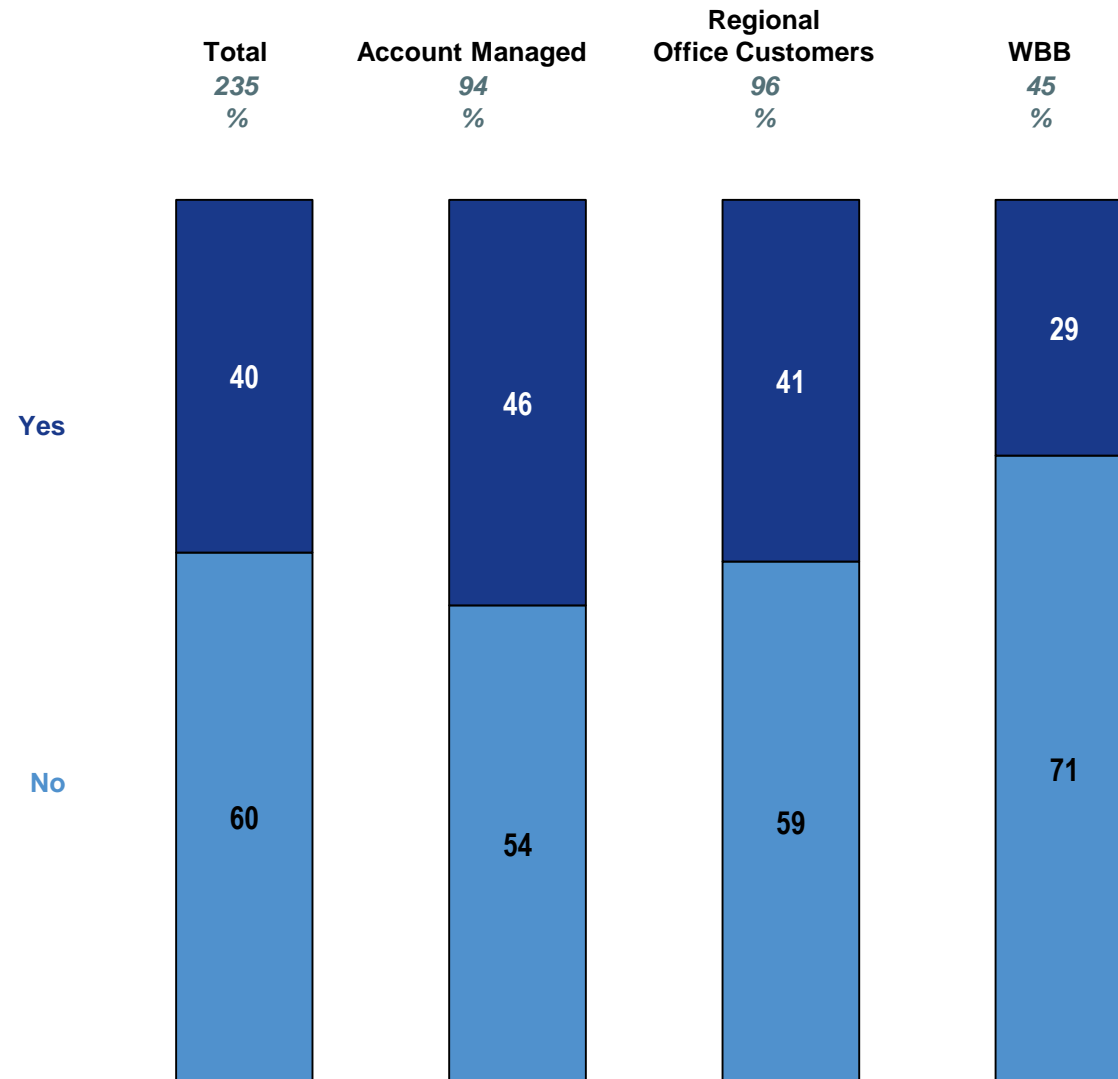
Key Performance Indicator – Performance

‘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: Apr-Jun '16 (235 Customers & WBB in Receipt of Offer)]

Actively Discussing Application for Additional Support



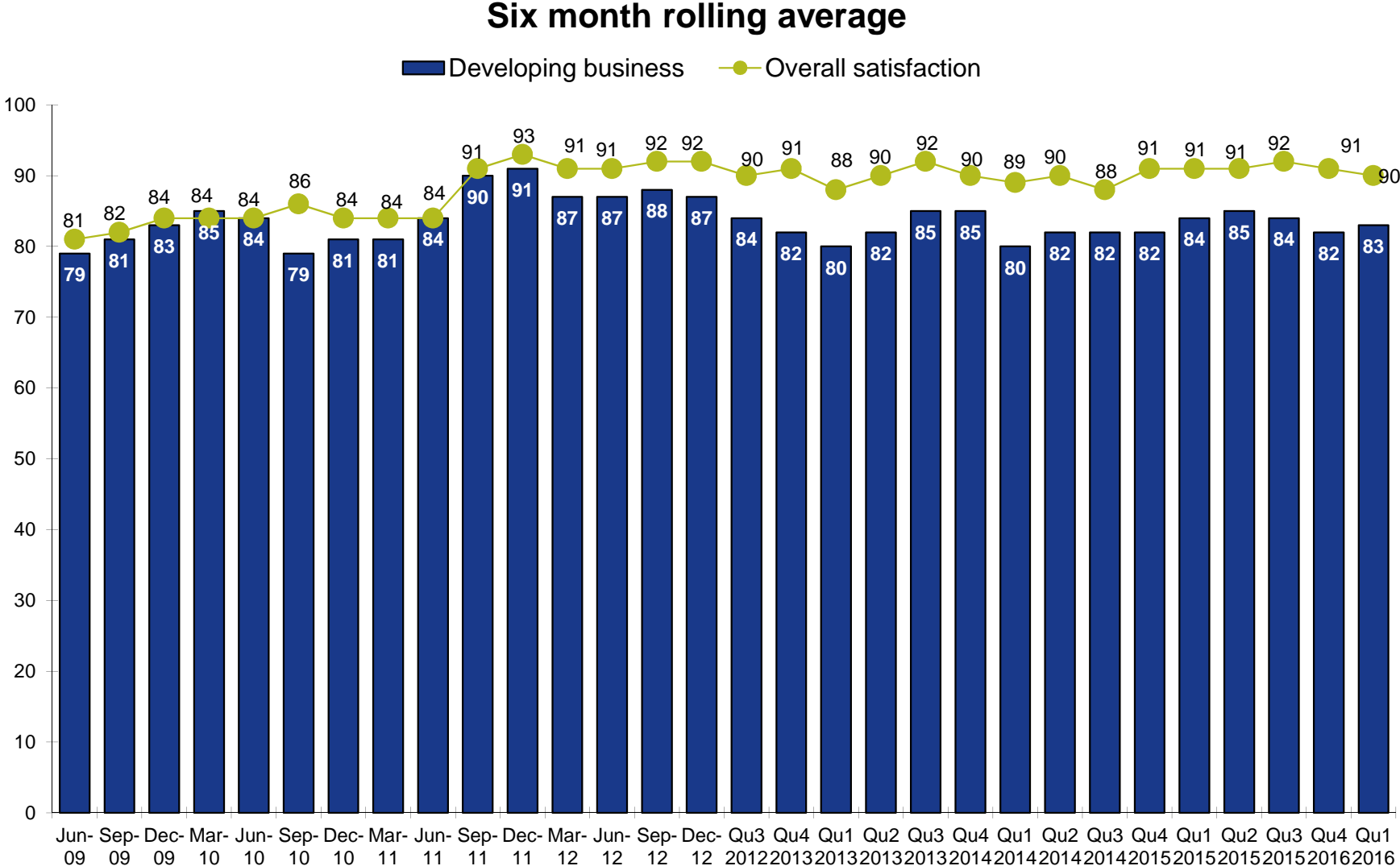
Are you actively discussing an application for additional support services at present?

[Base: [Base: 235 Apr-Jun '16 (94 Account Managed, 96 Regional Office Customers and 45 WBB)]

ROLLING AVERAGES

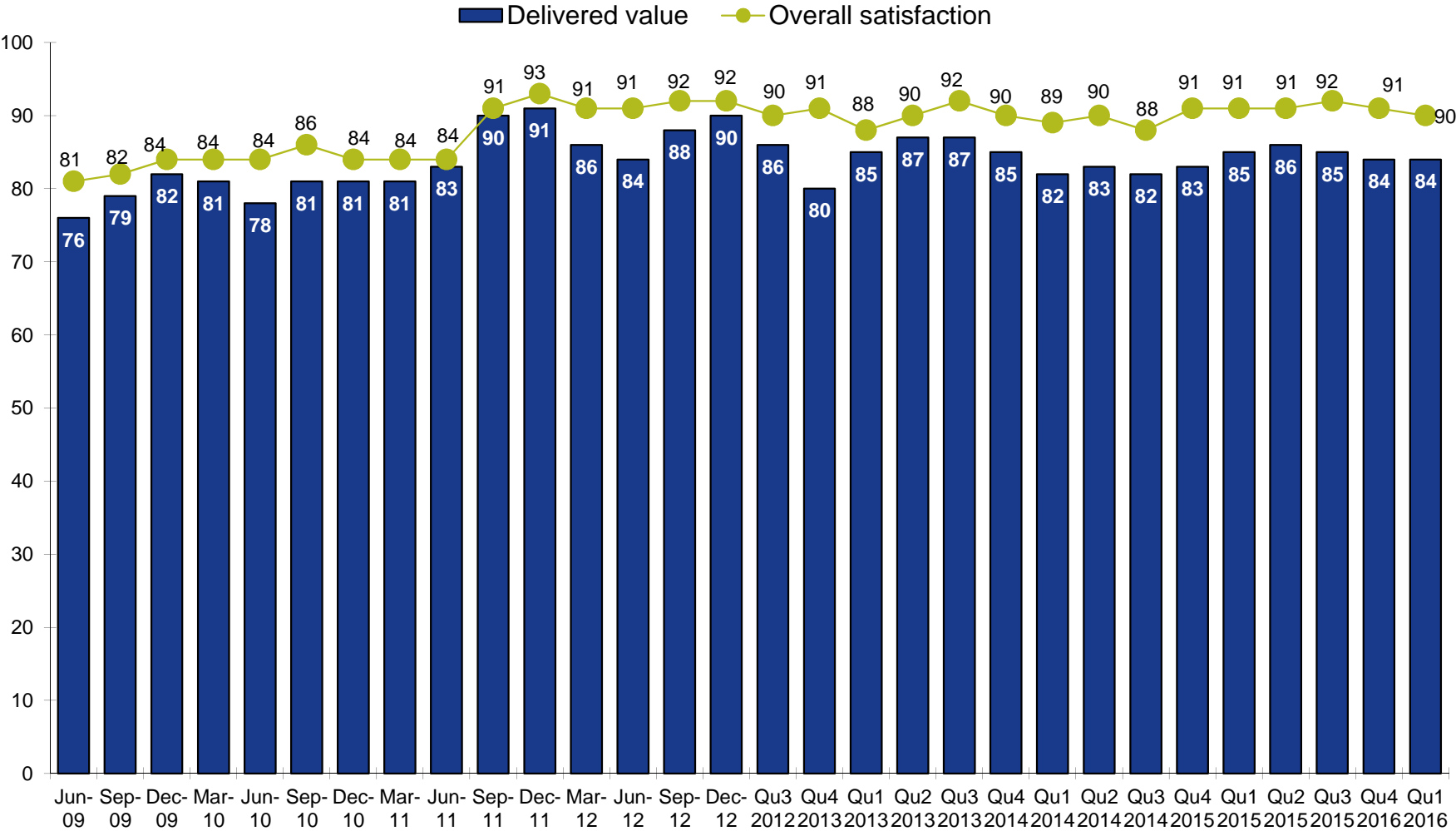


Satisfaction and key driver variables: INI is helping to develop my business



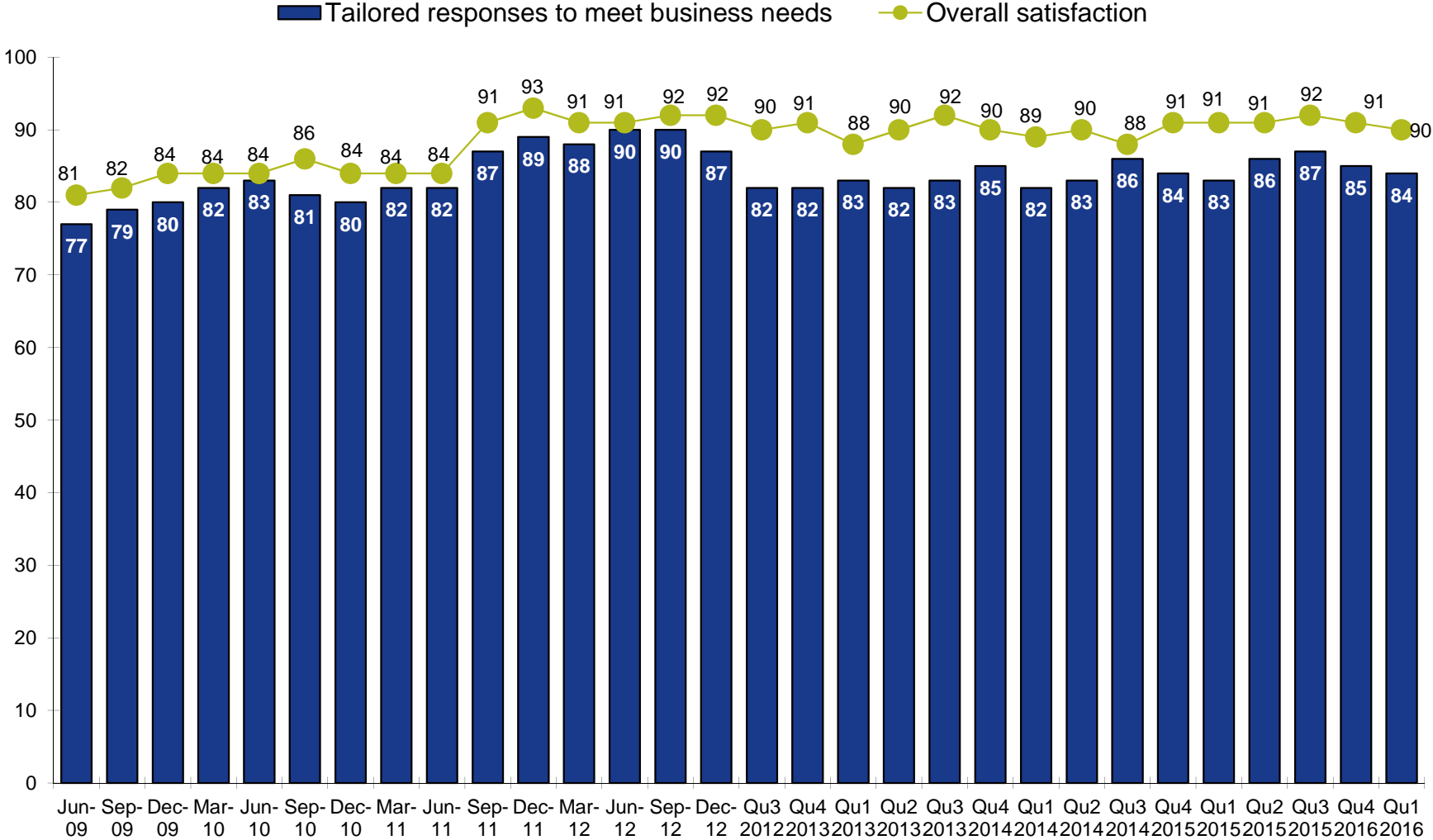
Satisfaction and key driver variables: INI delivered value to my business

Six month rolling average



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

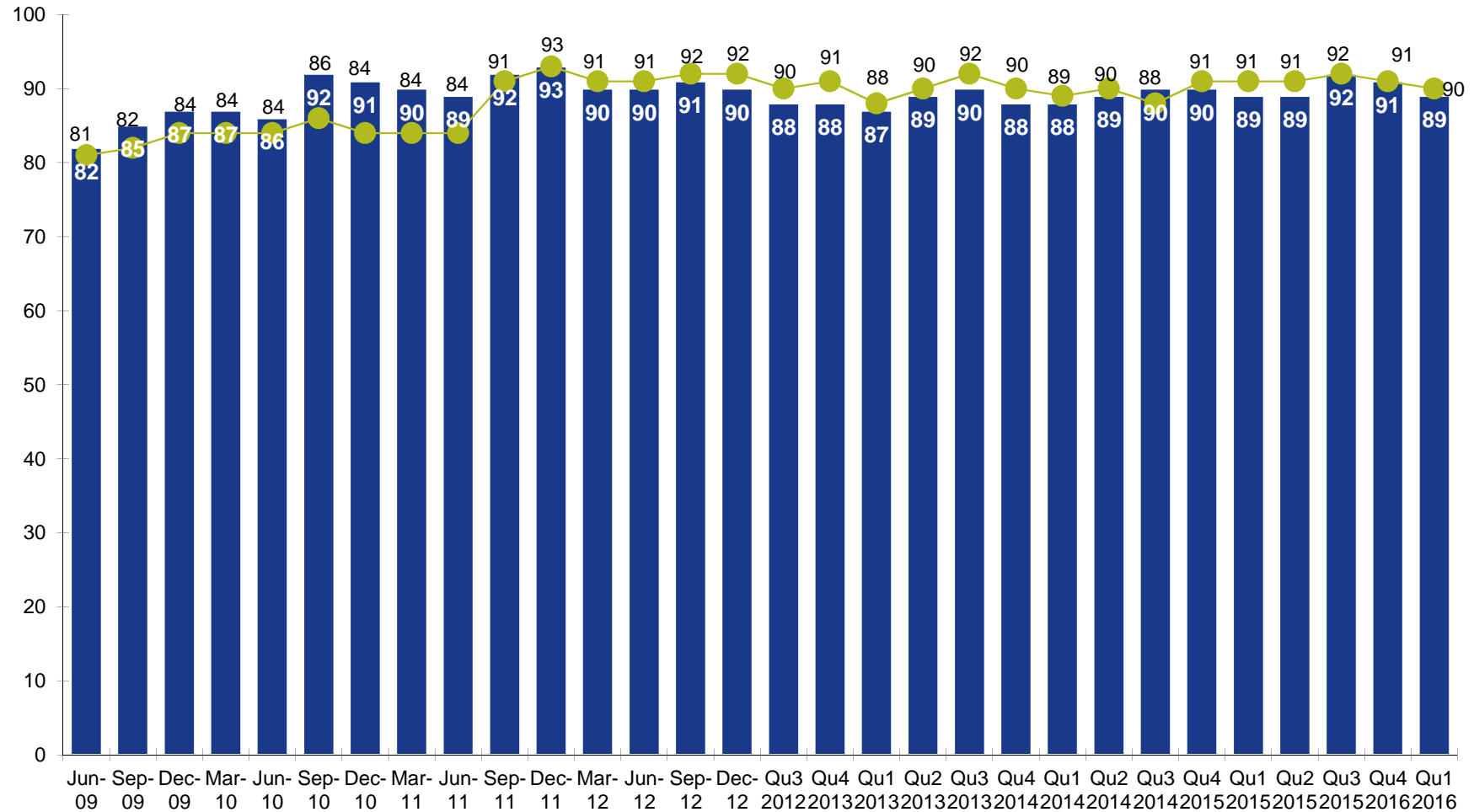
Six month rolling average



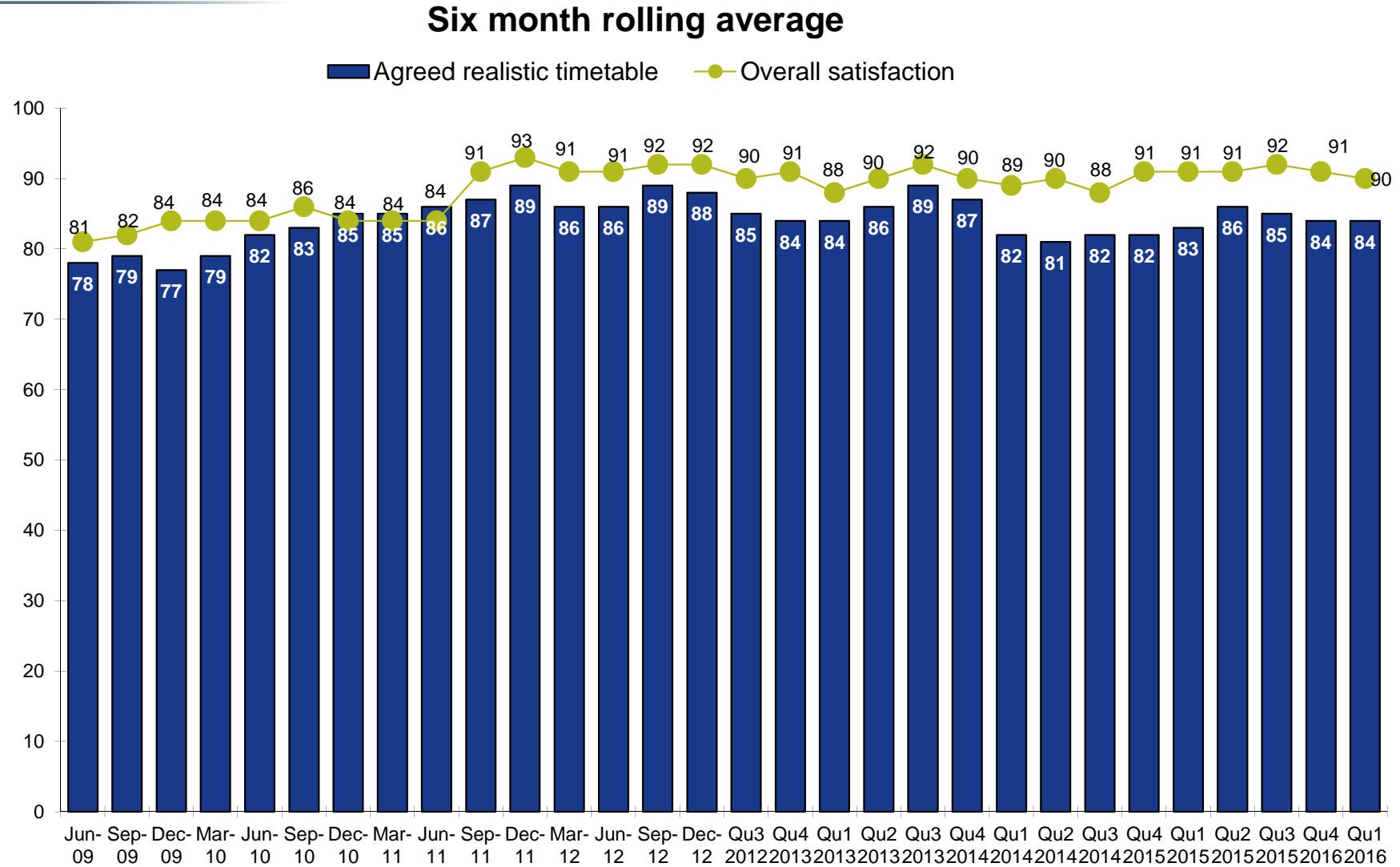
Satisfaction and key driver variables: Satisfaction with Client Executive

Six month rolling average

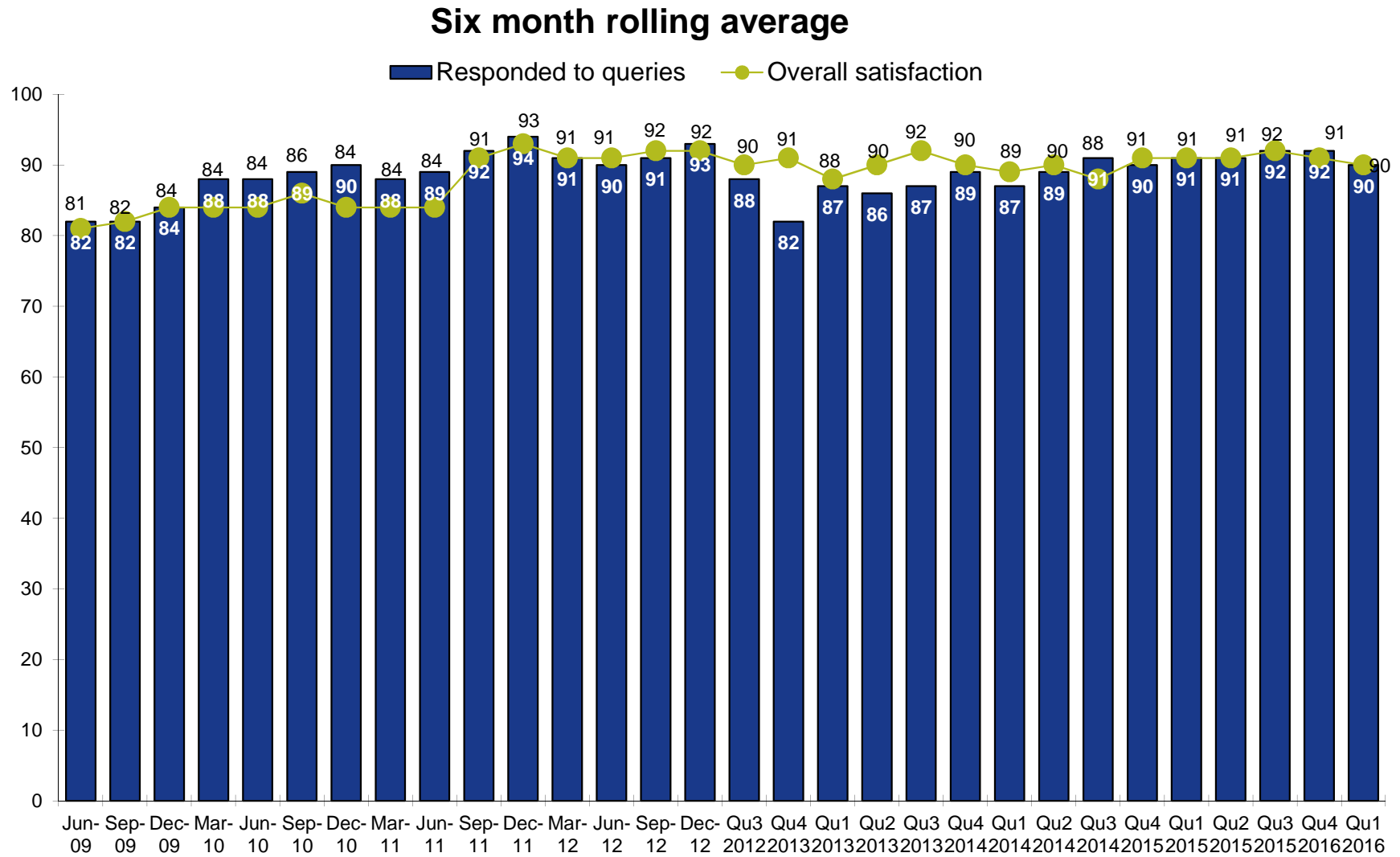
■ Satisfaction with Customer Executive ● Overall satisfaction



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

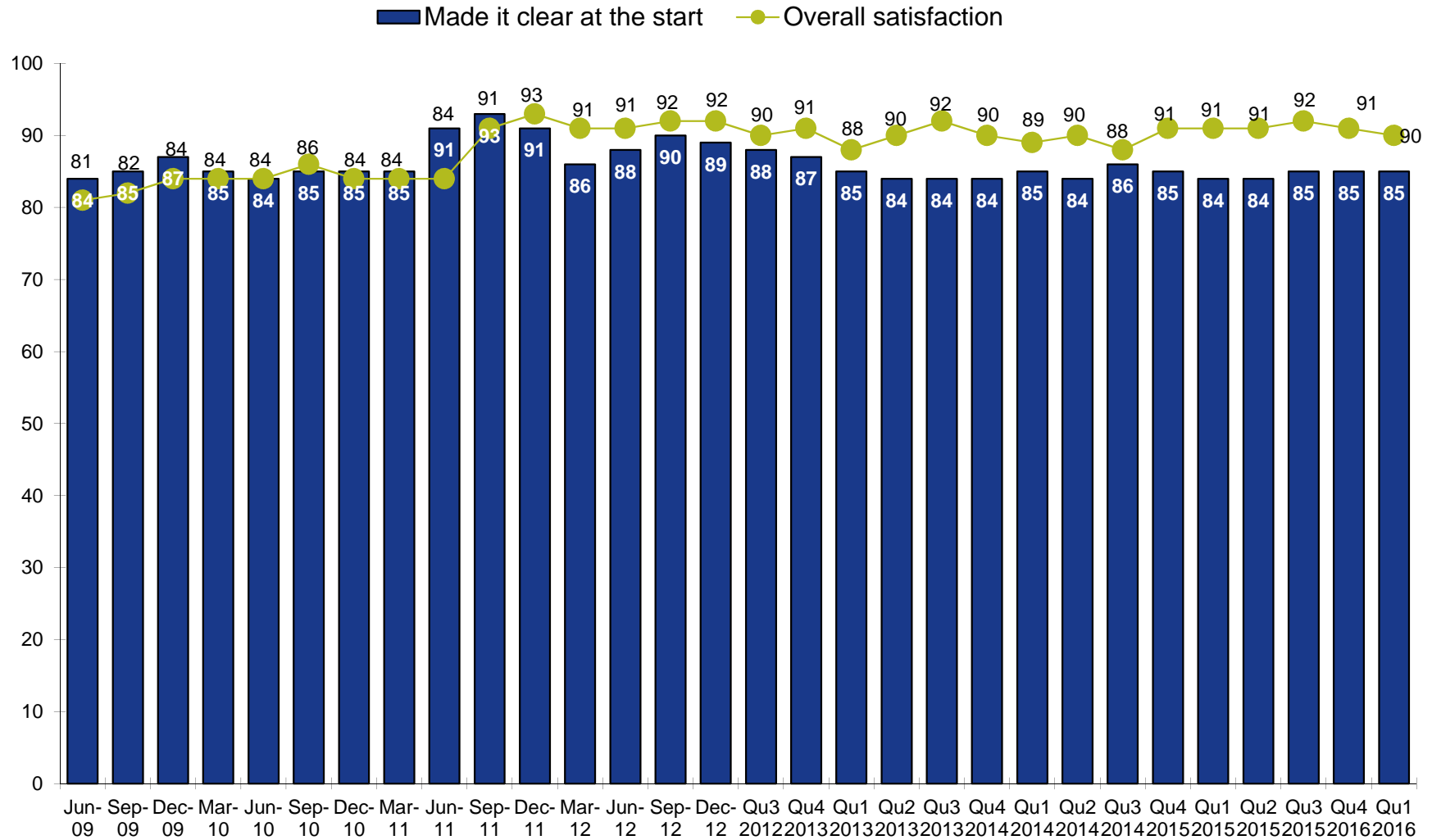


Satisfaction and key driver variables: INI responded to your queries within a reasonable timeframe



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

Average Rating	
Jan-Mar '16	4.43
Apr-Jun '16	4.46

Customers



Process - Management



■ April-June

Process - Communication



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: 235 Apr-Jun '16]

Performance by Segment: Account Managed Customers

Base = 94

Average Rating	
Jan-Mar '16	4.45
Apr-Jun '16	4.58

Customers



Process - Management



Process - Communication



■ April-June

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 ...?

Performance by Segment: Regional Office Customers

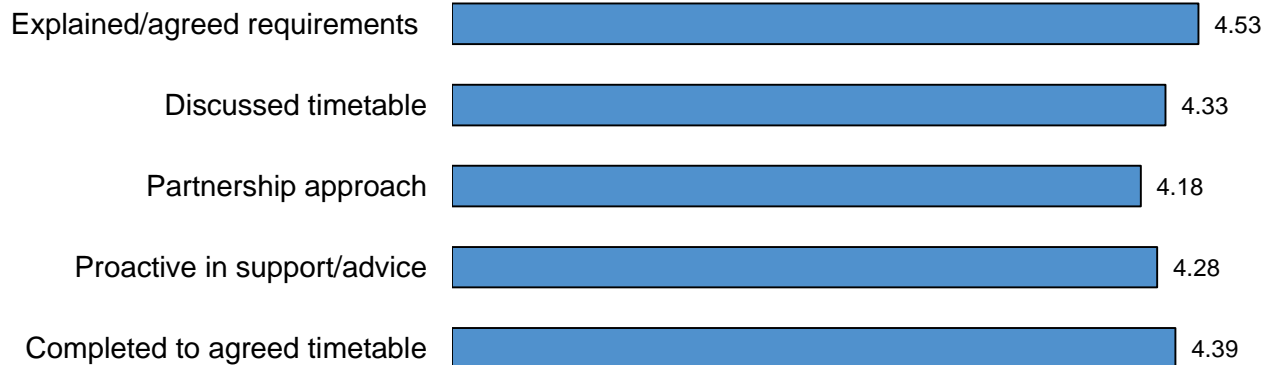
Base = 96

Average Rating	
Jan-Mar '16	4.49
Apr-Jun '16	4.38

Customers



Process - Management



■ April-June

Process - Communication



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 ...?

Performance by Segment: Wider Business Base

Base = 45

Average Rating	
Jan-Mar '16	4.25
Apr-Jun '16	4.37

Customers



Process - Management



■ April-June

Process - Communication



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 ...?