

**Annex 3**

**Network client journey**

Basic Network services usually address requests of purely informative nature and they do not require specific preparation, expertise or tailoring.

The client journey in the Network is associated with the provision of advanced Network services where Network advisors invest considerable efforts and time to respond to a complex query or help the company design a course of action and develop it. Therefore advanced services require specific expertise, much deeper research and thorough support.

The figure below illustrates the client journey concept and gives information on the main elements in the process.



Fig.1. The Network client journey

- **Needs assessment**

The initial step in the client journey is to assess the main characteristics and the needs of the SME as well as the ability and capacity of the Network to respond to these needs.

If the company does not meet the requirements to be served by the Network (e.g. due to missing international component, i.e. the potential of the SME to engage in international business activity), the Network partner signposts the client to a stakeholder outside the Network who could (better) address the client’s needs.

At this point, the Network partner identifies the main contact point to interact with the client (the hub). This will be the case manager for this client.

The needs assessment should be duly revisited to reflect the client's capacity, dynamics and expectations (or ambitions) and any changes in the external factors of the environment.

- **Action plan**

The action plan describes, starting from the needs assessment, the concrete actions of the hub and all the foreseen touchpoints (interactions) between the client and the spokes to respond to the identified need. It contains information on the actors and the objectives and sets timeline for completion of the services.

The client's engagement in the process should be ensured.

The action plan can be revised and should be regularly updated. If a new need is identified or a new complex query is formulated and taken up by the Network (not signposted), the action plan should be updated.

During the Network client journey, the hub or the spokes can change if deemed appropriate to provide the best support to the client.

Since the client journey is about maximising quality of the service and building relationships with the client, smooth communication with the companies should be maintained at all stages.

- **Achievements**

The successful delivery of advanced Network services is expressed in reaching an Achievement. Achievements bring high impact to the client's business and are considered as milestones in the client journey.

The achieved results for each client will be measured against the objectives set in the action plan.

- **Impact assessment**

Every 12 months an impact assessment on all action plans with at least one Achievement will be carried out to determine the effect of the Network services delivered during the previous year as well as ensuring an update on matured impact from services carried out in previous years.

The impact assessment is a cumulative measurement providing an overview of all impact achieved throughout the span of the individual action plans in a client journey.

**Annex 4**

**Performance and efficiency measurement: KPIs, ACTs and ratios**

Key performance indicators

Key Performance Indicators (KPIs) are measurable values that demonstrate how effectively Network members achieve their objectives in the period of the action.

They are built on the multi-step approach to services in the client-centric model presented in section 2.3.4 which facilitates the creation of an optimised impact for Network clients and is based on cooperation between the Network partners (hub and spokes).

Figure 1 explains the place of the KPIs in the Network client journey.

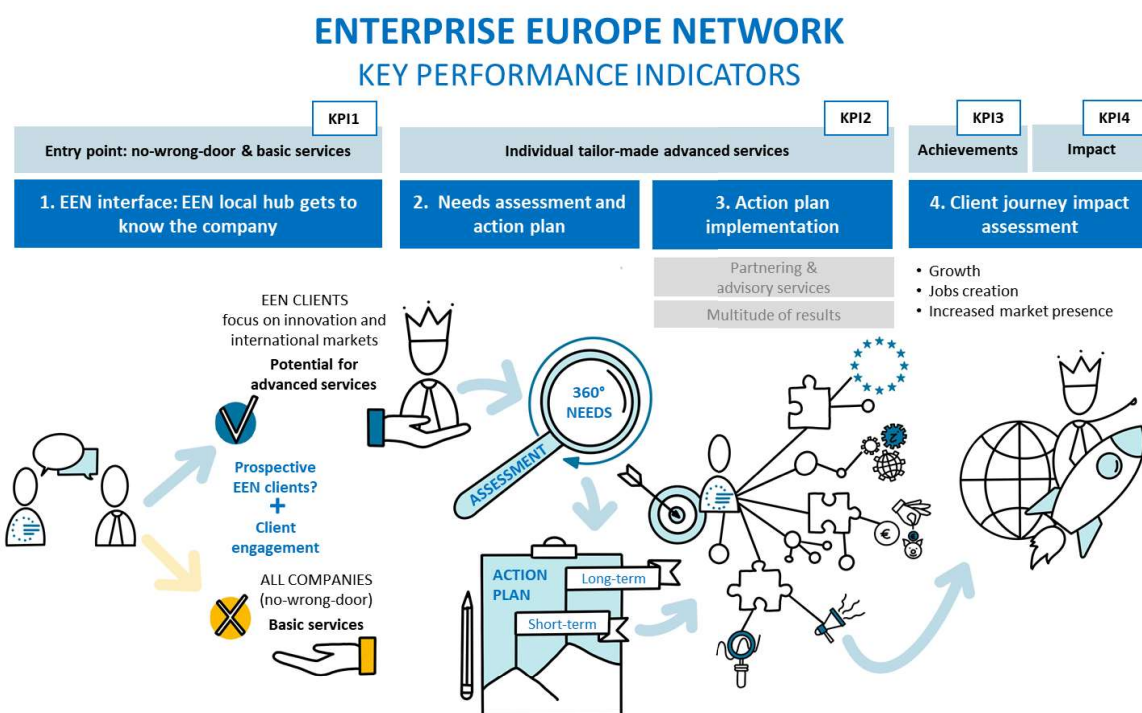


Figure 1. KPIs in the Network client journey

**KPI1. SMEs served by Enterprise Europe Network**

KPI1 counts the number of SMEs receiving any kind of service, **basic and/or advanced**, including **one-to-one**, **one-to-few** and **one-to-many**.

This indicator counts the companies served by the Network under the ‘no-wrong-door’ principle. It captures the Network’s outreach within the SME community in the geographical area covered by the consortium. It measures the number of SMEs that have been in contact with the Network in any capacity, regardless of characteristics like effort, duration, or impact.

In the Network client journey, KPI1 is linked to the entry point of the interaction with all companies. Some of the SMEs counted in this indicator will continue in the client journey becoming returning or repeat clients (for definitions, see Annex 2 Glossary of Terms).

For reporting, data will be extracted in combination between the Network partners' CRMs and the Network IT Platform.

### **KPI2. Unique clients in the Network client journey**

KPI2 counts the number of unique Network clients receiving tailor-made **advanced services** based on needs assessment and drafted action plan. These are typically customised **one-to-one** and **one-to-few** in-depth services to companies that have already started their client journey.

The indicator measures how many clients get active, strong and continuous Network support in any of the areas described in section 2.4.1.

In the Network client journey, the SMEs counted here are **returning clients**, who often turn into **repeat clients**. The support requires close ties with and deep knowledge of the client developed in both initial and regularly updated needs assessment, supported by a detailed action plan to maximise the positive impact on its business.

KPI2 captures the Network's **effective client base** receiving value-added and impact-driven support through advanced services (as described in Activity 1). It is a subset of KPI1. In contrast to KPI1, KPI2 includes only advanced services provided during the client journey.

All services delivered to clients in KPI2 are aiming at Achievements (KPI3) – advisory or partnering – and a positive impact for the client in a short- and/or long-term perspective.

### **KPI3. Achievements**

KPI3 counts the number of Achievements from Network advisory and partnering services. They result from tailor-made **advanced, one-to-one** and **one-to-few** in-depth services with considerable, measurable and/or identifiable **impact** for the client.

Impact is associated with the company's financial growth: increased market share, increased turnover, optimised costs or realised savings in international activities, job creation or maintenance, improved quality of products, services or processes, introduced product or service innovations related to international activities.

KPI3 captures the outcome of the Network support to clients. Achievements can be reached with the participation of one or more Network partners (hub and spoke model) and are reported by both. They have a clear international dimension and capitalise on the Network effect.

In the Network client journey, Achievements are milestones for the clients counted under KPI2.

### **KPI3a. Advisory Achievements**

Advisory Achievements (AAs) result from advanced advisory services described in section 2.4.1.1. They are carried out by one or more Network partners leading to a significant positive outcome for the client.

AAs facilitate and consequently mark the successful entry to market or international presence of a Network client in an EU Member State other than the one it is based or in a SMP associated country, or in one of the Network's international partners' countries (see section 2.3.5).

The result of the service is associated with considerable, measurable and/or identifiable **impact** for the client.

### **KPI3b. Partnering Achievements**

Partnering Achievements (PAs) result from partnering services described in section 2.4.1.2. They are carried out by one or more Network partners leading to a significant positive outcome for the clients concerned.

PAs mark the successful conclusion of a concrete medium- to long-term collaboration between two Network clients located in different EU Member States, SMP associated countries or in a country of one of the Network's international partners<sup>58</sup> (see section 2.3.5). The result of this collaboration is associated with considerable, measurable and/or identifiable **impact** for the client.

In specific cases and always in the interest of the client, PAs can be concluded between a Network client and a company or organisation that are not Network clients (yet). These **single-party PAs** cannot exceed 20% of all PAs of a consortium<sup>59</sup>.

### **KPI4. Unique clients with an impact assessed in their client journey**

KPI4 counts the number of unique clients that have received **a series of tailor-made advanced services** and completed an impact assessment, which showed clear evidence of important benefit for the client.

KPI4 captures the **long-term impact** of the Network support to clients.

Impact is associated with the company's financial growth: increased market share, increased turnover, optimised costs or realised savings in international activities, job creation or maintenance, improved quality of products, services or processes, introduced product or service innovations related to international activities.

The impact assessment is conducted by the Network partner acting as the hub according to an **impact assessment questionnaire**, which will be made available by the Agency. It will measure the positive effects of the Network's services on the SME clients provided by Network partners in the following areas:

- Business development;
- Financial development;
- Organisational development;
- Cooperation development.

The questionnaire must also gather information about the client satisfaction from the provided services.

The encoding and proceeding with the impact assessment questionnaire will be through the Network IT platform ensuring measurement of the cumulative impact of advanced services in a certain timeframe for every unique client.

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<sup>58</sup> In the latter case, one of the Network clients concluding the partnership should be based in the EU or in a SMP associated country.

<sup>59</sup> In single-party PAs with participation of non-EEN countries, the cooperation with the country should be identified in the work programme of the consortium or, if not, it should be explicitly approved in advance by the Agency.

## **Activity indicators**

Activity indicators (ACTs) are a measurable result of a Network partner's day-to-day operations set in place to reach the objectives of the Network. It holds a record of all the activities related to defined **internal processes** facilitating the functioning of the Network.

ACTs work in tandem with the KPIs within the entire logical framework of the Network services implementation. They pinpoint the types of internal processes that will drive expected positive outcomes. Moreover, three out of the four ACTs are directly related to the roles and competences of the Network advisors, stressing the fact that the strength of the Network lies in the professionalisation of every advisor, as well as in the fostering of the Network common capital of knowledge and expertise.

Figure 2 gives an overview on the ACTs in the Network.

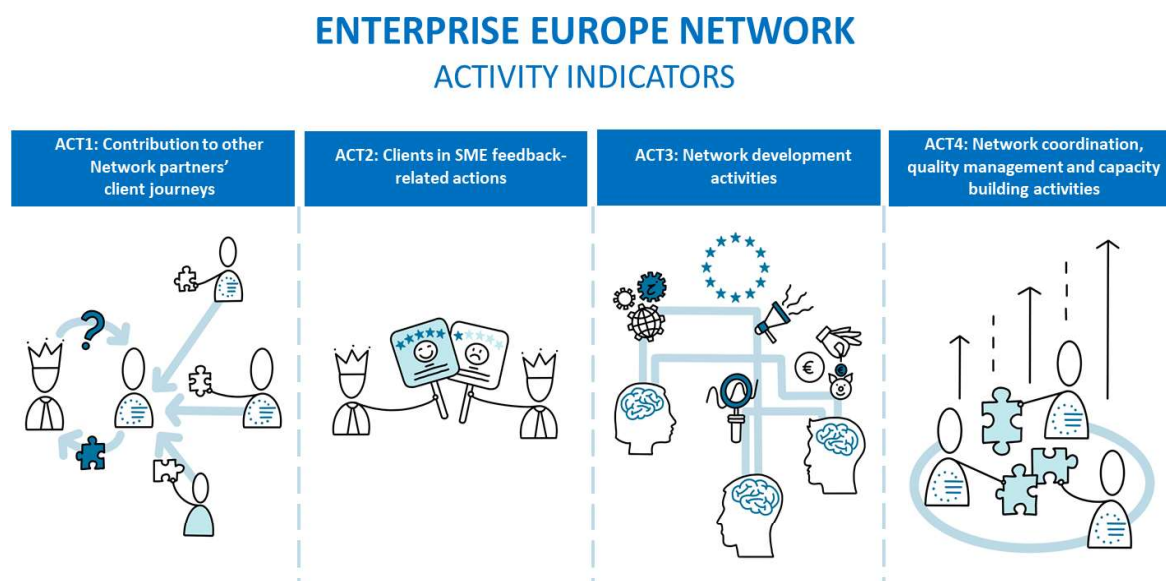


Figure 2. Activity indicators in the Network

### **ACT1. Contribution to other Network partners' client journeys**

ACT1 counts the number of advanced services provided to another Network partner's client journey case. This indicator relates to the Network effect and captures the hub and spoke model.

The indicator measures the contribution as a spoke to the client journey of another Network partner.

There are often situations encountered during the work of the Network Advisor, when one needs to reach out for further knowledge and experience-based support from Network colleagues in other partner organisations, other consortia in his / her own country or consortia from other countries in order to address their client's needs. This type of support is sought with the aim of getting one-to-one professional support to dealing more effectively and productively with the needs of their own clients.

Adhering to this, Network advisors are expected to provide advanced support services to other Network partners in matters where they have highly skilled or specialised competencies that can address the needs of that partner's client.

The contribution could include, but is not limited to technical, specialised, higher competences services in the following areas:



- VAT legislation
- Labelling legislation
- IPR
- Public procurement
- Enhancing innovation management capacities services utilising certified tools for innovation audits, such as IMP3rove, IHC, DIQ, etc.
- CE marking
- Funding and access to finance...

## **ACT2. Clients in SME feedback-related actions**

ACT2 counts the number of clients in SME feedback-related actions consulted on their opinion about legislative proposals or initiatives of the European Commission likely to have an impact on businesses.

Given the fact that the activity can imply different intensity of interaction with the Network client, the indicator has two subcategories:

### ***ACT2a. Clients in SME feedback-related actions reached on a wider basis***

This subcategory refers to **basic one-to-many services**. It counts the SME clients who are contacted, informed, invited and consulted to fill in questionnaires on EU legislation sent typically through the EU Survey<sup>60</sup>. The provided service does not open a case for the client, it has a mass character and is not customised.

The subcategory is counted also in KPI1.

### ***ACT2b. Clients in SME feedback-related actions reached individually***

This subcategory refers to **advanced one-to-one services**. They imply individual SME feedback cases followed through the SME feedback database and/or client journey recordings of SOLVIT and EBPT cases in the Network IT platform.

The subcategory is counted also in KPI2.

## **ACT3. Network development and capacity building activities**

ACT3 counts the participation of a Network advisor in activities that contribute to the development of the Network as defined in section 2.4.3.

This indicator aims to incentivise and measure the activities that help in building the Network capital and competences. It stimulates the uptake, promotion and dissemination of good practices, unique competences and skills' uptake and improvements at wide Network level, while at the same time rewarding accountability and ownership of the Network advisor in horizontal roles.

## **ACT4. Network coordination and quality management activities**

ACT4 counts the participation of a Network advisor in activities that contribute to the Network coordination and quality management as defined in section 2.4.4.

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<sup>60</sup> [EUSurvey](#) is an online survey management system for creating and publishing forms available to the public, e.g. user satisfaction surveys and public consultations.

This indicator aims at encouraging Network advisors and teams to actively engage in Network-level efforts and endeavours, which contribute directly to enforcing and enhancing the Network capacity and capital on the grand scale, while, also contributing to the progress and purpose of each of the daily activities.

In most of the cases, the Network advisor is assigned a specific individual role or takes on specific responsibilities supporting the Network development.

### **Ratios**

While KPIs and ACTs provide information on performance and activities in absolute numbers, ratios make a link between them and provide relative information on performance and efficiency. Ratios act as comparison-ready data for a qualitative and quantitative analysis.

Performance and efficiency ratios should be used as internal tools by consortia and each individual Network partner to adjust their client support offer and strategy and improve their overall project advancement and by the Agency in monitoring and evaluation of day-to-day actions or during reporting assessment exercises of deliverables according to contractual obligations.

#### **R1. Achievements per unique clients in the EEN client journey**

Ratio 1 gives information on the number of Achievements (KPI3) over the number of unique clients getting advanced Network support in their client journey (KPI2). This is a **performance** ratio.

$$\text{Ratio \#1} = \frac{\text{KPI3 Achievements}}{\text{KPI2 Unique clients in the Network client journey}}$$

It reflects the level of efficiency of partners in selecting clients with high growth potential and the offer of appropriate set of services. The ratio shows how many unique clients end up with evidenced **short-term** impact of the Network support in their businesses.

#### **R2. Clients reporting impact per unique clients in the Network client journey**

Ratio 2 gives information on the number of successful client journeys (KPI4) over the number of unique clients getting advanced Network support in their client journey (KPI2). This is a **performance** ratio.

$$\text{Ratio \#2} = \frac{\text{KPI4 Unique clients with an impact assessed in their client journey}}{\text{KPI2 Unique clients in the Network client journey}}$$

It shows the unique clients with successful, impact-inducing client journeys, effectively measuring the **long-term** impact of the Network support.

#### **R3. Achievements per FTE**

Ratio 3 gives information on the number of Achievements (KPI3) over the total number of FTEs dedicated towards supporting unique clients through advanced Network services. This is an **efficiency** ratio.



$$\text{Ratio \#3} = \frac{\text{KPI3 Achievements}}{\text{FTE}}$$

It measures the efficiency of services by relating successful services (Achievements) to the effort – resources needed to reach the latter.