NSW Digital Service Toolkit - Activities and templates

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|  | Research communicationsUse the templates to draft your communications for research participants before, during and after your research activities. |

## Document snapshot

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| --- |
| **Use for**: Preparing research communications |
| **When**: Before, during and after research sessions |
| **With**: User research lead |
|  | Time **15 mins +**  |  | Casting**1+ team members**  |  | Tools**Word** |
|  | The time you need depends on what communications you’re drafting and the method of delivery. |  | Drafting research comms is a 1-person job but it’s a good idea for the user researcher (if that’s not you) or someone else in the team to review it. |  | This template is in Word, you can transfer this to another tool if you’d prefer. |

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## Document guide

Communicating with research participants can be difficult, but it’s crucial to good user research.

The templates are a handy shortcut to drafting communications specific to your team and project, and showing you what, when and why to communicate with participants.

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| --- | --- | --- |
| **What’s it for** | **What you’ll get** | **When to do it** |
| A collection of communication templates you can use when you engage with users, instead of drafting them from scratch.  | Communication templates you can adapt and re-use for all your research activities | The templates can help you prepare comms before, during and after your research sessions. |

## How it works

**Before you start**

* Complete your research plan
* Plan your recruitment and identified participants
* Approve any remuneration or reimbursement payments you’re offering, including the method of payment.
* Approve consent forms.

**Step 1***:* Identify what stage you’re at in your research process

**Step 2:** Search the document for the template that matches the communications your drafting

**Step 3:** Adapt the template to suit your project

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##  ▐ Website registration of interest

|  |  |
| --- | --- |
| **Overview** |  |
| Purpose | Get people to register their interest in a paid study you’re conducting. |
| When | Recruitment phase. |
| Channel | Online via nsw.gov.au consultation page or agency website.  |

### Template

*[Agency name]* is conducting a research study across our customer base to better understand people’s needs and their experience in interacting with us.

Insights from this study will assist us in continuing to transform *[Agency Name].* Customers eligible to participate in the research will be reimbursed for their time with a *[insert dollar amount e.g. $50]* gift card.

Please register your interest here *[insert link to URL].* Applications close midnight *[date and time].*

## ▐ Email asking people to register for an interview

|  |  |
| --- | --- |
| **Overview** |  |
| Purpose | Ask the people who’ve expressed interest in taking part in your research study to complete a registration form. |
| When | Recruitment phase. |
| Channel | Email.  |

### Template

Dear *[Participant Name]*

Thank you for expressing an interest in participating in the *[Name of Project]* Research study which will provide us with insights to help us better service our customers now and into the future.

To be considered for interview please complete this registration form *[insert link to registration form].*

If you are selected for interview you will receive an email with a link to schedule your preferred time and date for interview.

Thank you very much for your time.

Kind regards

*[Agency/team Name].*

## ▐ Direct recruitment (via NSW Government research panel)

|  |  |
| --- | --- |
| **Overview** |  |
| Purpose | Recruiting eligible participants that are listed on an internal NSW Government research panel. |
| When | Recruitment phase. |
| Channel | Email.  |

### Template

**Subject:** *[Agency name]* – Invitation to provide feedback

Dear Customer,

*[Agency]* is conducting a research study across our customer base to better understand our customers’ needs and their experience in interacting with us. Insights from this study will help us continue to improve our customer experience, and design products and services that meet the needs of all our customers.

We are writing to you because you have recently *[applied for / used one of our services]* and we would like to provide you with the opportunity to register your interest in sharing feedback on your experience. Customers who qualify to participate in the research will be remunerated for their time with a *[dollar amount e.g. $50]* gift card.

The research will be conducted during the period of *[dates]* via *[format of research session e.g. video conferencing]* with a duration of approximately *[duration of research sessions in minutes]* per interview.

Please register your interest here before *[time and date].* You will be asked to provide some details about yourself and your recent interaction with *[Agency].* Customers who qualify to participate in user research interviews will receive an email invitation to schedule an interview at a time convenient to them.

If you have any questions, please contact us at: *[NSW Government team email].*

Yours faithfully

*[Agency Sponsor].*

## ▐ Expression of interest screening questions

|  |  |
| --- | --- |
| **Overview** |  |
| Purpose | Screen interested people to identify eligible participants to participate in your research study |
| When | Recruitment phase. |
| Channel | Online form or via email.  |

### Template

* First name
* Last name
* Email address
* Phone number
* What product / service did they interact with?
* Channel – paper, online, email, call, shopfront?
* Do you have access to a computer with microphone and camera?
* Do you have a reliable internet connection?
* Are you available for a [format of research sessions e.g. video or phone] interview lasting *[duration of session in minutes]* minutes during *[dates]?*
* Can we contact you for future user research?

## ▐ Email invite to participants selected for an interview

|  |  |
| --- | --- |
| **Overview** |  |
| Purpose | Invite selected participants to an interview and provide interview details. |
| When | Interview preparation. |
| Channel | Email.  |

### Template

**Subject:** Interview selection and booking

Dear *[Name]*

Thank you for registering your interest in the *[Team Name]* Research Study. You have been selected to participate in an interview with the research team and we are looking forward to talking with you.

**Please select your preferred date and time for your interview** *[insert link]*

Once you’ve selected your date and time you will receive an auto confirmation from *[booking tool].* If you do not receive this confirmation, please contact the team at *[NSW Government team email].*

Once your interview is scheduled the team will send you an Outlook calendar invite with further details about your interview including the names of your two researchers and how to connect to the video conferencing software.

On completion of the research study *[insert date or month]* you will receive your *[dollar amount]* Gift Card to your nominated email address.

We are looking forward to meeting you over the coming days.

Kind regards,

*[Team Name].*

## ▐ Calendar invite to participants selected for an interview

|  |  |
| --- | --- |
| **Overview** |  |
| Purpose | Send a calendar invitation to participants taking part in user research interviews. |
| When | Interview preparation. |
| Channel | Calendar invitation.  |

### Template

**Subject:** Interview confirmation and details with *[Team Name]* Research Team

**Attachments**: Consent form

Dear *[Name]*

Please see below the details of your interview with the [your team name] Research Team.

**Consent Form**

We've attached a consent form to this email, please read and return to *[NSW Government team email]* before your interview.

**Research Team and Interview Details**

[Name of user researcher] will be conducting your interview. Access your interview via this link:

**Click this link at *[time and day]*** *[Insert link meeting link]*

**Your Contact Details**

We have your phone number listed as: *[insert participant phone number].* Please let us know if this is not correct.

Kind regards

*[Team Name].*

## ▐ Email to interview participants with MS Teams instructions

|  |  |
| --- | --- |
| **Overview** |  |
| Purpose | Provide interview participants with instructions about how to how to use MS Teams for the interview and provide any additional resources they need. |
| When | Interview preparation.  |
| Channel | Email.  |

### Template

**Subject:** Resources for research interview

**Attachments**: consent form

Dear *[Name]*

Please see the below resources for your interview with the Customer Service Research Team.

Please see the below resources for your interview with the Customer Service Research Team.

**Consent form**

**Before your interview please complete the attached consent form and return it to *[NSW Government team email]***

**Microsoft Teams**

For the research interviews we’ll be using Microsoft Teams (Teams) to speak with you. We’ve sent you an invitation with a link to your Teams video call. If you’re not familiar with Teams, below are instructions on how to use it.

There are two ways to use Teams, either through your internet browser or by downloading the desktop app to your phone or computer. If you already have the Teams app, you just need to click on the Team’s link and it will open automatically. We’ve outlined below how to use Teams with just your internet browser.

**Instructions for using Teams**

**Step 1**. First, click on the Teams link we’ve sent you. This will open a web browser. If you aren’t using the Teams app, click ‘Cancel’.

**Step 2**. You will then be asked how you’d like to join the meeting again – if you aren’t using the Teams app, simply ‘continue in this browser’. You can also choose to use the app if you have it downloaded.

 

 **Step 3.** When you first enter the meeting, you will see the below screen. Click ‘join now’ to enter the waiting room, and we’ll let you into the interview shortly. You can click the camera button to turn your video on and off.



Kind regards,

*[Team Name]*

## ▐ Reminder to participants about their scheduled interview

|  |  |
| --- | --- |
| **Overview** |  |
| Purpose | Send a reminder to participants the day before their interview. |
| When | Interview preparation. |
| Channel | Email or phone.  |

### Template

#### Email

**Subject**: Research interview reminder

**Attachments**: Consent form (if not received)

Dear *[Participant Name]*

We are looking forward to meeting you at your interview tomorrow.

*If required:*

We have not yet received your consent form for the interview. I have attached it for your convenience. Could you please complete it and return it to this email address prior to your interview?

**Please see below a reminder of all the details of your interview**

* *[Provide summary of interview details including, time, date, interview link],*

Kind regards,

*[Lead Researcher Name]* and *[Scribe Name]* from *[Team name]*

#### Phone call

Hello, this is *[your Name]* from the *[Team Name]* Research Team, is this *[Participant Name]?*

I am just calling to say we are looking forward to chatting with you tomorrow at *[time]* via *[mode of interview e.g. video link or phone call].*

*If required:*

*We have not yet received your consent form. Could please complete it and send it to [NSW Government email] prior to the interview?*

We look forward to seeing you tomorrow.

Bye for now.

#### Voicemail

Hello, this is *[your Name]* from the *[Team Name]* Research Team at *[Department Name],* with a message for *[Participant Name].*

I am just calling to say we are looking forward to chatting with you tomorrow at *[time]* via *[mode of interview e.g. video link or phone call].*

*If required:*

*We haven’t received your consent form yet. Could please complete it and send it to [NSW Government email] prior to the interview.*

We’re looking forward to seeing you tomorrow.

Bye for now.

## ▐ Thank you email post interview

|  |  |
| --- | --- |
| **Overview** |  |
| Purpose | Thank your interview participants post interview. |
| When | Post research session. |
| Channel | Email.  |

### Template

**Subject**: Thank you!

Dear *[Participant Name]*

Thank you for attending your recent interview with *[User Researcher Name]* from the Customer Service Research Team for *[Team Name].*

On conclusion of the research study *[approx. month]* you will receive your *[insert dollar amount]* Gift Voucher to your nominated email address. Please ensure you check your spam folder.

Once again thank you for all your time. Your contribution is highly valued, and we look forward to using the feedback and information you provided to improve our customers’ experience.

Kind regards,

*[Team Name].*



Document end.