

RESEARCH MESSAGE CHEAT SHEET

Planning your research message is a three-step process that will help you send the **right message**, at the **right time** to the **right person**.

1. What do we want to learn?

Define your research objective. Start at the end, think about the decision you are trying to make.

2. Who do we want to ask?

Define your audience. A clearly defined audience ensures you will collect data from the right customers.

3. How should we ask the question?

Write and send your message. A friendly, well timed message will get more responses than a hastily written one.

HOW TO WRITE A RESEARCH MESSAGE

CONTEXT

Asking a question immediately after a customer has done something or visited somewhere in your product, will help you capture more relevant insights.

Hi Pat, I noticed that you recently sent a test email.

We're in the process of making some improvements to sending test emails and I wanted to get your feedback.

Your introduction

Explain why you're sending them a message, so they know why they're being contacted.

If you're using Intercom, you won't have to introduce yourself because customers can see your profile.

Tip: Try to use keywords in the first few characters, so they'll know quickly whether it's relevant to them or not.

If you have a moment, could you tell me:

Why did you send that test email?

How did you find the experience?

The question

Ideally this should be one but no more than two questions. If you have more than this, you should create a survey instead.

Tip: Be as direct as possible, but be careful not to suggest or prompt a particular answer.

Thanks! ☺
Sinéad

Your sign off

Make sure they know you appreciate their time.

Tip: Don't be afraid to show your personality here.