**PM & Respondent interaction map.**

PM sets up the project

PM gets the respondent details from their recruiter

PM uploads the respondent, name, surname, email, mobile number, postcode (optional) on the platform for the project to check against Repeat Attendance Database (RAD). I assume this can be excel of CSV file? Template for this is below.

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Name | Surname | Email | Mobile | Postcode (optional) | Date of the group - will be automatic via system | Project number - will be automatic via system | Project name - will be automatic via system |
| Jon | Doe | jondoe@email.com | 0777777777 | A12 3BC | 25/01/2021 | 5165 | Argo |

Project number and Project name is something that the client will assign when they are setting you a project.

Platform checks the database for Repeat Attendance against all other respondents uploaded on the system ***only for this client***.

When a client signs up the Platform we need to give the client the option to add any RAD details they already hold – E.g. Ardent Fieldwork have a excel RAD that we use and have respondents listed on there who have done research for us in the last 2 years. We should be able to upload this to the system. Below template can be used for this

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Name | Surname | Email | Mobile | Postcode (optional) | Date of the group | Project number | Project name |

Platform should operate the Repeat Attendance Database (RAD) on a traffic light system.

* Anyone that has taken part Research in the last 3 months is flagged as RED
* Anyone that has also done more than 6 projects in the 2 years is also flagged as Red
* Anyone that has done research in the last 3 to 6 months shows up as Orange
* Anyone that has not taken part is flagged as Green

If 2 or more of the above variables in Blue match, the platform should flag them a possible repeat attender. PM should be able to see where the match is occurring (i.e. they should be able to see the match records that are identified) and the PM should have the final say if they allow the respondent is allowed or not.

If someone is flagged RED or Orange, the PM should be able to see the date they took part in research and the project number. PM has the final say of a respondent is allowed to take part even if they are Orange or RED

In the next phase the PM will send out an email for the respondents that have been accepted to invite them to the research. Here they confirm attendance, sign ProjectWize terms and conditions, sing Client consent form, do any pre task required, and then attend the research.

We will need to provide a email template here that the PM can amend according to their project.

At this stage the respondents also have the option to choose the way in which they would like to get the incentive and provide their details for receiving the payment. ***(Not sure if we should this stage now or after they have taken part – if the respondent drops out or is cancelled, we will be collecting unnecessary bank details)***

The PM should be able to track on the project which respondents have done which of the above stages and should be able to send out reminders of anything is missing – e.g. not signed client consent form.

For our T&C the respondent needs to accept them to proceed and for the client consent from we will need them to sign via a digital signature. The digital signature should be valid in a court of law in case there is any dispute.

The platform should also give the PM the ability to SMS the respondents – in case they have not completed the above tasks with the link to complete it via phone, or in case PM wants to send out some instructions, or just a reminder to attend the research.

Once the research has been completed the PM will check with the researcher who attended and should have the ability to pay those that have taken part and provide the bank details already, or if they have not then the system should send out a reminder to respondent to choose the payment method and provide the payment details. Once this is done the system should notify the PM to action the payment.

If someone has not responded to the payment details request the PM should be able to set how many reminders go out to them and how often. Mostly they will choose 2 or 3 additional reminders ever 3-4 days apart.

If the respondent has still not claimed the incentive, the PM should see this as a credit on the project.

PM should be able to download all the consent forms in PDF with the digital signature. PM should also be able to download the payment report.

PM closes of the project at this stage and marks it as completed.

Throughout the process if a respondent wants to email or sms back the platform should tell the respondent this is a ***noreply*** email / sms and they should email the PM directly. PMs should be asked to give an email ID and contact phone as standard in all communications to the respondents. ***Maybe we should set this at the PM registration stage then it becomes default on all communications in the Signature.***