

# Reminder and retention emails

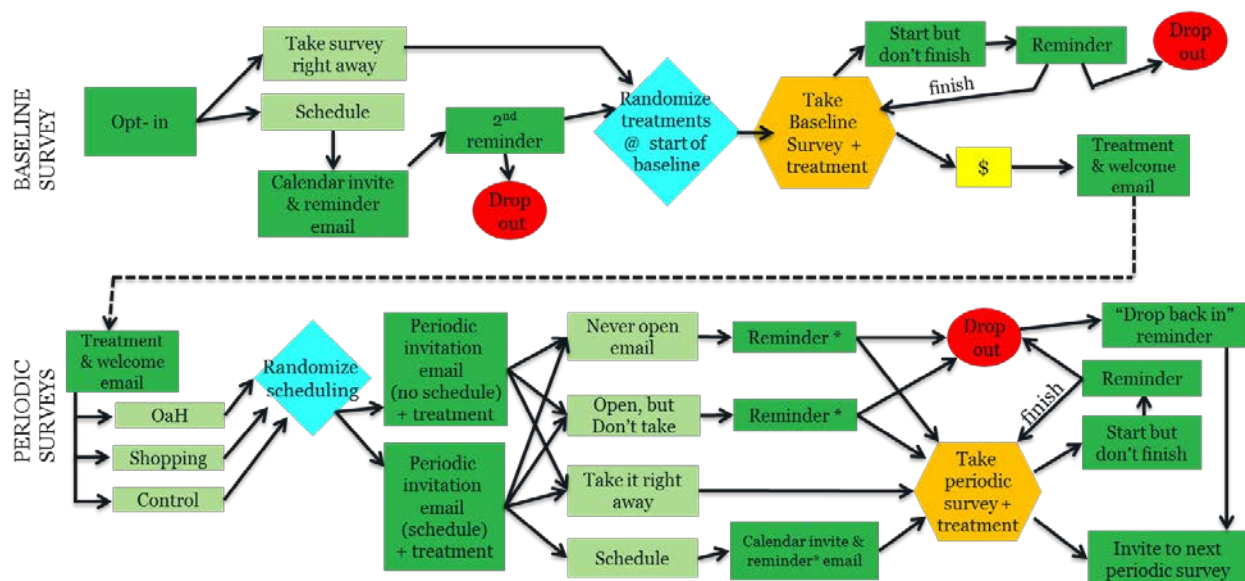
## Summary

This document contains reminder and retention emails for two parts of the study:

1. Baseline survey – the initial survey all participants will take
2. Periodic surveys – includes both the initial periodic survey and the following periodic surveys.

## Background

If a participant does not complete any given survey, they will receive reminder emails. In the pilot study, we will test whether or not giving participants the option to schedule a time to take the survey increases completion rate. Prior to administering the periodic surveys, participants will be randomized into a “scheduled” group and a “non-scheduled” group. Participants in the “scheduled” group will always receive the opportunity to schedule the survey. Participants in the non-scheduled group will not receive the opportunity to schedule the survey.



\* Reminders will include option to schedule for scheduling group, and will be administered twice: once 24 hours after the event has been missed, and once 24 hours before the final deadline.

## 1. BASELINE SURVEY REMINDER/RETENTION EMAILS

There are two groups of people who will be receiving communications at this stage:

- Group 1: Scheduled participants
- Group 2: Non-scheduled participants

### GROUP 1: SCHEDULED PARTICIPANTS

Within the scheduling group two reminder/retention emails everyone will receive:

- **Base Calendar Invite**, which is sent at the time of scheduling
- **Base Reminder #1**, which is emailed before the scheduled time

If participants miss their scheduled time, they will receive an additional reminder:

- **Base Reminder #2**, which is sent 24 hours after their scheduled time

In addition, if participants start but do not finish the survey, they may receive two additional reminders:

- **Base Reminder #3**, which is 24 hours after they abandoned the survey
- **Base Reminder #4**, which is sent 24 hours before the survey completion deadline

### BASE CALENDAR INVITE

*Sent at time of scheduling (when participants schedule for the future)*

FROM LINE A: CFPB Home Buying Survey

FROM LINE B: Home Buying Survey

SUBJECT LINE A: [TIME][am/pm]: Take home buying survey

Hello,

Thank you for scheduling this time, [time of appointment], to take our initial home buying survey. We really appreciate your time. Your responses will help us make the process of buying a home and finding a mortgage easier for everyone. As a thank you, we will send you \$[5/105] [to your PayPal account/as an Amazon e-giftcard/as a gift card] when you complete the survey.

Take the survey now

Thanks!

The Home Buying Study team

### BASE REMINDER #1

*Sent one hour before the scheduled time*

FROM LINE A: CFPB Home Buying Survey  
FROM LINE B: Home Buying Survey

SUBJECT LINE A: Reminder: Take your home buying survey  
SUBJECT LINE B: Time to take home buying survey  
SUBJECT LINE D: [TIME][am/pm]: Take home buying survey

Hello,

Thank you for scheduling this time, [time of appointment], to take our initial home buying survey. We really appreciate your time. Your responses will help us make the process of buying a home and finding a mortgage easier for everyone. As a thank you, we will send you \$[5/105] [to your PayPal account/as an Amazon e-giftcard/as a gift card] when you complete the survey.

Take the survey now

Thanks!  
The Home Buying team

## BASE REMINDER #2

*Sent 24 hours after the scheduled time*

FROM LINE A: CFPB Home Buying Survey  
FROM LINE B: Home Buying Survey

SUBJECT LINE A: Oops! You didn't take the home buying survey  
SUBJECT LINE B: Reminder: Please take the home buying survey  
SUBJECT LINE C: Please take the home buying survey

Hello,

We noticed that you didn't take the home buying survey yesterday at your scheduled time. Your responses are really important to us in our effort to make the process of buying a home and finding a mortgage easier for everyone. Could you take the survey now?

Take the survey now

As a thank you for your time, we will send you \$[5/105] when you complete the survey.

Thanks!  
The Home Buying team

### **BASE REMINDER #3**

*Sent 24 hours after participants start and abandon the survey.*

FROM LINE A: CFPB Home Buying Survey

FROM LINE B: Home Buying Survey

SUBJECT LINE A: Please finish your home buying survey!

SUBJECT LINE B: Only X days left to finish the home buying survey

Hello,

Yesterday, you started our home buying survey, but you didn't finish it. Please take a moment now to finish your survey. Your responses are really important to helping us make the process of buying a home and finding easier for everyone. As a reminder, when you complete this survey, we will send you \$[5/105].

[Finish the survey now](#)

All of your progress on the survey has been saved. You can continue from where you left off by clicking the above link

Thanks!

The Home Buying team

### **BASE REMINDER #4**

*Sent 24 hours before final deadline.*

FROM LINE A: CFPB Home Buying Survey

FROM LINE B: Home Buying Survey

SUBJECT LINE A: Please finish your home buying survey!

SUBJECT LINE B: Only 24 hours left to finish the home buying survey

Hello,

Time is running out – we need your survey as soon as possible! Your responses are really important to helping us make the process of buying a home and finding easier for everyone. You only have 24 hours left to finish. As a reminder, when you complete this survey, we will send you \$[5/105].

[Finish the survey now](#)

All of your progress on the survey has been saved. You can continue from where you left off by clicking the above link

Thanks!  
The Home Buying team

## GROUP 2: NON-SCHEDULED PARTICIPANTS

*Sent 24 hours after they started the survey*

Since non-scheduled participants will begin the baseline survey right after reviewing the informed consent, they will only receive emails if they start but do not finish the survey. There are two potential reminder emails they might receive:

- **Base Reminder #3**, which is 24 hours after they abandoned the survey
- **Base Reminder #4**, which is sent 24 hours before the survey completion deadline

The copy of these reminder emails is the same as for the scheduled group.

## 2. PERIODIC SURVEY REMINDER/RETENTION EMAILS

Again, there are two groups of people who will receive periodic survey reminder/retention emails:

- Group 1: Scheduled participants
- Group 2: Non-scheduled participants

### GROUP 1: SCHEDULED PARTICIPANTS

For periodic surveys, all participants in the “scheduled” group will receive an invitation to take or schedule each periodic survey.

If participants never open the email, or if they open the email but never click through to take or schedule the survey, they will receive the following email:

- **Periodic Reminder #1**, which is sent either 24 hours after they fail to open or 24 hours after they fail to click to take/schedule. Language is the same for both of these reminders, and participants may get the reminder multiple times if they both don’t open the email promptly and, following opening, don’t take/schedule their survey.

If participants opt to schedule, they will receive these emails:

- **Periodic Calendar Invite**, which is sent at the time of scheduling
- **Periodic Reminder #2**, which is emailed before the scheduled time

If participants miss their scheduled time for a periodic survey, they will receive an additional reminder:

- **Periodic Reminder #3**, which is sent 24 hours after their scheduled time

In addition, if participants start but do not finish a periodic survey, they may receive two additional reminders:

- **Reminder #4**, which is 24 hours after they abandoned the survey
- **Reminder #5**, which is sent 24 hours before the survey completion deadline

### PERIODIC REMINDER #1

*Sent 24 hours after email is received but not opened AND/OR sent 24 hours after email is opened but participant has not scheduled/started the survey.*

FROM LINE A: CFPB Home Buying Survey

FROM LINE B: Home Buying Survey

SUBJECT LINE B: Reminder: Please take the home buying survey

SUBJECT LINE C: Take the home buying survey now

Hello,

We noticed that you haven't started or scheduled your next home buying survey yet. Your responses are really important to us in our effort to make the process of buying a home and finding a mortgage easier for everyone. As a reminder, if you complete all the surveys, at the end of this study, you will receive a thank you of \$[50/4015/25]

Today's survey should take about 5 to 15 minutes, depending on your responses.

Take the survey now

Schedule a time to take the survey

Please take the survey within the next 5 days. If you start the survey but can't finish it, your results will be saved as long as you return to the survey using this link.

Thanks!  
The Home Buying team

### PERIODIC CALENDAR INVITE

*Sent at time of scheduling (when participants schedule for the future)*

FROM LINE A: CFPB Home Buying Survey  
FROM LINE B: Home Buying Survey

SUBJECT LINE A: [TIME][am/pm]: Take home buying survey

Hello,

Thank you for scheduling this time, [time of appointment], to take this next home buying survey. We really appreciate your time. Your responses will help us make the process of buying a home and finding a mortgage easier for everyone. As a reminder, if you complete all the surveys, at the end of this study, you will receive a thank you of \$[50/4015/25].

Take the survey now

Thanks!  
The Home Buying Study team

### PERIODIC REMINDER #2

*Sent one hour before the scheduled time*

*Note: Only copy changes from Base Reminder #1 are money references and using "next" rather than "initial" to refer to the survey.*

FROM LINE A: CFPB Home Buying Survey  
FROM LINE B: Home Buying Survey

SUBJECT LINE A: Reminder: Take your home buying survey  
SUBJECT LINE B: Time to take home buying survey  
SUBJECT LINE D: [TIME][am/pm]: Take home buying survey

Hello,

Thank you for scheduling this time, [time of appointment], to take this next home buying survey. We really appreciate your time. Your responses will help us make the process of buying a home and finding a mortgage easier for everyone. As a reminder, if you complete all the surveys, at the end of this study, you will receive a thank you of \$[50/4015/25].

Take the survey now

Thanks!  
The Home Buying team

### PERIODIC REMINDER #3

*Sent 24 hours after the scheduled time*

*Note: Copy is identical to Base Reminder #2 except for money references.*

FROM LINE A: CFPB Home Buying Survey  
FROM LINE B: Home Buying Survey

SUBJECT LINE A: Oops! You didn't take the home buying survey  
SUBJECT LINE B: Reminder: Please take the home buying survey  
SUBJECT LINE C: Please take the home buying survey

Hello,

We noticed that you didn't take the home buying survey yesterday at your scheduled time. Your responses are really important to us in our effort to make the process of buying a home and finding a mortgage easier for everyone. Could you take the survey now?

Take the survey now

As a reminder, if you complete all the surveys, at the end of this study, you will receive a thank you of \$[15/2550/40].

Thanks!  
The Home Buying team

#### PERIODIC REMINDER #4

*Sent 24 hours after participants start and abandon the survey.*

*Note: Copy is identical to Base Reminder #3 except for money references.*

FROM LINE A: CFPB Home Buying Survey

FROM LINE B: Home Buying Survey

SUBJECT LINE A: Please finish your home buying survey!

SUBJECT LINE B: Only X days left to finish the home buying survey

Hello,

Yesterday, you started our home buying survey, but you didn't finish it. Please take a moment now to finish your survey. Your responses are really important to helping us make the process of buying a home and finding easier for everyone. As a reminder, if you complete all the surveys, at the end of this study, you will receive a thank you of \$[50/4015/25].

[Finish the survey now](#)

All of your progress on the survey has been saved. You can continue from where you left off by clicking the above link

Thanks!

The Home Buying team

#### PERIODIC REMINDER #5

*Sent 24 hours before final deadline.*

*Note: Copy is identical to Base Reminder #4 except for money references.*

FROM LINE A: CFPB Home Buying Survey

FROM LINE B: Home Buying Survey

SUBJECT LINE A: Please finish your home buying survey!

SUBJECT LINE B: Only 24 hours left to finish the home buying survey

Hello,

Time is running out – we need your survey as soon as possible! Your responses are really important to helping us make the process of buying a home and finding easier for everyone. You only have 24 hours left to finish. As a reminder, if you complete all the surveys, at the end of this study, you will receive a thank you of \$[50/4015/25].

[Finish the survey now](#)

All of your progress on the survey has been saved. You can continue from where you left off by clicking the above link

Thanks!

The Home Buying team

## GROUP 2: NON-SCHEDULED PARTICIPANTS

Since non-scheduled participants have only two options – take the survey now, or fail to respond to the survey invite – they will receive fewer reminder/retention emails.

Like the scheduled participants, if the non-scheduled participants do not open their invitation email, or if they open it but do not start the survey, they will receive a reminder:

- **Periodic Reminder #6**, sent to non-scheduled participants 24 hours after they receive but do not open their invitation email, or 24 hours after they open their invite email but do not start the survey.

In addition, like the scheduled participants, the non-scheduled participants will receive emails if they start but do not finish the periodic surveys. There are two potential reminder emails they might receive:

- **Periodic Reminder #4**, which is 24 hours after they abandoned the survey
- **Periodic Reminder #5**, which is sent 24 hours before the survey completion deadline

The copy for these final two emails is the same as for the scheduled group.

## PERIODIC REMINDER #6

*Sent 24 hours after email is received but not opened AND/OR sent 24 hours after email is opened but participant has not scheduled/started the survey.*

*Note – copy is identical to Periodic Reminder #1 but for omitting the word “scheduled” at appropriate times.*

FROM LINE A: CFPB Home Buying Survey

FROM LINE B: Home Buying Survey

SUBJECT LINE B: Reminder: Please take the home buying survey

SUBJECT LINE C: Take the home buying survey now

Hello,

We noticed that you haven't started your next home buying survey yet. Your responses are really important to us in our effort to make the process of buying a home and finding a mortgage easier for everyone. As a reminder, if you complete all the surveys, at the end of this study, you will receive a thank you of \$[50/4015/25]

Today's survey should take about 5 to 15 minutes, depending on your responses.

[Take the survey now](#)

Please take the survey within the next 5 days. If you start the survey but can't finish it, your results will be saved as long as you return to the survey using this link.

Thanks!

The Home Buying team