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Secrets for Effective Survey Invitations

Carla Hillerns
University of Massachusetts Medical School

Et al.

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Greetings AEA colleagues. We are **Carla Hillerns** and **Pei-Pei Lei** – survey enthusiasts in the Office of Survey Research at the University of Massachusetts Medical School. In 2014, we shared a post about effective email subject lines for internet survey invitations. Today we'd like to focus on the body of the email. Here are strategies for writing email invitations that motivate recipients to participate in your survey.

Hot Tips:

- **Personalize the salutation.** Whenever possible, begin the invitation with the recipient's name, such as "Dear Carla Hillerns" or "Dear Ms. Lei." Personalization helps people know that they're the intended recipient of the invitation.

- **Do not bury the lead.** Use the first line or two of the email to invite the recipient to take the survey. Some people might open your email on mobile devices, which have significantly smaller screen sizes than most computers.

- **Include the essentials**. A survey invitation should accomplish the following:
  - Explain why the individual is chosen for the survey
  - Request participation in the survey
  - Explain why participation is important
  - Provide clear instructions for accessing the survey
  - Address key concerns, such as confidentiality, and provide a way for recipients to ask questions about the survey, such as a telephone number and email address
  - Express appreciation
  - Include sender information that conveys the survey's legitimacy and significance

- **Less is more.** The most frequent problem we've seen is an overly wordy invitation. Follow the modified KISS principle – Keep It Short and Simple. Common issues that complicate invitations are:
  - Overlong sentences
  - Redundant points
  - Extra background details
  - Cryptic wording, such as acronyms and technical jargon
  - Intricate instructions for accessing and/or completing the survey

Cool Trick:

- **Pre-notify, if appropriate.** Examples of pre-notifications include an advance letter from a key sponsor or an announcement at a meeting. Pre-notification can be a great way to relay compelling information about the survey so that the email invitation can focus on its purpose.

Lesson Learned:

- **Anticipate technical difficulties.** For example, embedded hyperlinks may not be compatible with all systems. It is good practice to spell out the survey's web address (e.g., http://survey.umassmed.edu/example) rather than rely on a link alone (e.g., "**Click Here to Take Our Survey**").

Rad Resources:

- Emily Lauer and Courtney Dutra's [AEA365 post](#) on using Plain Language offers useful tips that can be applied to all aspects of survey design and implementation, including the initial invitation email, any reminders emails, and the survey itself.

- [Internet, Phone, Mail, and Mixed-Mode Surveys: The Tailored Design Method, 4th Edition](#) by Don A. Dillman, Jolene D. Smyth, and Leah Melani Christian provides lots of helpful guidance for crafting invitations and implementing internet surveys.