

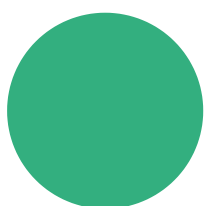


Manage user/UX research efficiently, cost-effectively and ethically.
Everything you need - participant, panel and study management
with workflows, automations and a CRM.

Service definition document

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What is Participant Kit?

Participant Kit is a CRM and participant management platform built specifically for user research, design research and Research Ops.

The infrastructure you need to run your own research at scale.

Create powerful workflows to automate your research (research panels, communication, informed consent, data governance and scheduling).

Create inclusive and accessible participant experiences. Ensure privacy and compliance at every step.

Trusted by UK government departments including Ministry of Justice, Cabinet Office and NHS BSA.

- Home
- Panels
- Admin dashboard
- Projects
- Integrations Discovery

Integrations Discovery

+ Study

Actions

Scheduling Integration Research

+ Add participants

Study actions

Participants

Forms & Pages

Candidates

Sorted by Status

Edit columns

Export CSV

☐	Person	Last contacted	Status	Consent	Agreement	Tags	Incentivised on
☐	B11 Matthew	2024-11-08	Invited	--	✓		Not set
☐	B12 Uriah Panelist	2025-10-02	Invited	✓	--	contacted	Not set
☐	B15 Mo	2024-05-31	Scheduled	✓	--	no show	2025-06-19
☐	B2 Nkosi	2024-05-31	Scheduled	✓	--	paid anytag	Not set
☐	B6 Victoria	2024-05-31	Scheduled	✓	--	off platform	2025-06-19
☐	B3 Shirley	2024-05-31	Paid	✓	--	contacted	2025-06-19
☐	B1 Adam	2025-02-11	Paid	✓	--	anything	2025-06-11
☐	B4 Apara	2024-05-31	Paid	✓	--	abusive	2025-06-16
☐	B13 Alice Screened	Not contacted yet	-	--	--		Not set
☐	B14 Rana Panelist	Not contacted yet	-	--	--		Not set

"I've been using Participant Kit for a few months now and it is a game changer."

Senior User Researcher, Major Gov. Dept.



What's included

Participant Management & CRM

Central database for all your participants with custom fields, tags, filters and complete interaction history.

Panel Management

Build and manage your own participant pools. No more buying from external panels or recruitment agencies.

Form Builder

The most powerful form builder for research. Create:

- **Consent forms** with granular permissions
- **NDA**s with eIDAS digital signatures
- **Screener forms** with qualifying logic
- **Panel recruitment** forms

All forms include:

- ✓ WCAG 2.2 AA accessibility
- ✓ Multi-lingual support
- ✓ Dyslexia-friendly mode
- ✓ Conditional branching

Study Management

Project dashboards with real-time visibility. Track participant progress through every stage.

Scheduling Integration

Calendar integration with Microsoft Bookings, Calendly and other scheduling tools. Automated booking after consent - no more back-and-forth emails.

Bulk Messaging

Personalised emails with merge fields, bounce reporting and shared team message history.

Templates

Save and reuse form structures, consent templates and study setups. Standardise processes across your team.

Workflows & Automations

Automate scheduling, form triggers and follow-ups. Keep human checkpoints where they matter.

Incentive Tracking

Track payments and rewards. Know who's been paid and who's pending at a glance.

Participant Portal

Self-service profile updates. Participants manage their own details without needing logins.



Why Participant Kit

Ethics-first by design

True informed consent, not tick-box compliance. Accessibility as standard. This is how we believe research should be done - it's a company-wide commitment, not a feature.

Operational maturity for growing teams

Move from scattered spreadsheets to a single source of truth. Audit trails, workflows and proper governance - the infrastructure research teams need as they scale.

Cost-effective and focused

Transparent pricing, no bloat, no complicated licensing. Just the tools research teams actually need. We stay focused on participant management and do it well.

Researcher-to-researcher support

Ben personally supports every customer - and he's a researcher who's lived these problems. When you ask how to handle a tricky consent scenario, you get advice from someone who understands the context.

UK-based, UK/EU data storage

We're a UK company with data stored in the UK and EU by default. One less thing to check with procurement.

Purpose-built for participant management

If you're using a survey tool to manage consent forms and research panels, you're stretching it beyond what it was designed for. Participant Kit handles the participant lifecycle - recruitment, consent, scheduling, governance - so your survey tool can focus on surveys.



Built for compliance

We take security and data protection seriously. Here's how we help you stay compliant.



GDPR

EU data protection



CCPA

California privacy



PIPEDA

PIPEDA

Canadian privacy



LGPD

Brazilian privacy



HM Government
G-Cloud
Supplier

G-Cloud 15

UK government
marketplace



eIDAS compliant

Legal digital signatures



Cyber Essentials

UK security certified



Cloud Security Alliance

Level 1 self-certified

Data protection

- ✓ UK and EU data storage by default
- ✓ TLS 1.2+ encryption in transit, AES-256 at rest
- ✓ Daily backups with 4-day point-in-time restore
- ✓ Disaster recovery plan tested annually
- ✓ Documented incident response procedures

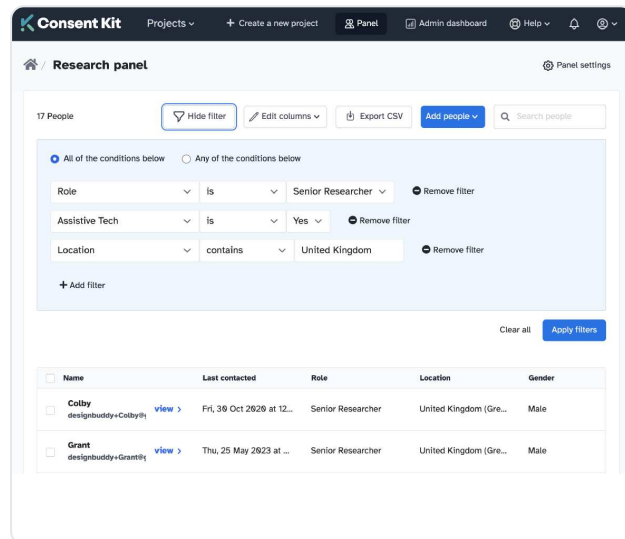
Security & access

- ✓ ISO 27001 aligned ISMS in operation
- ✓ Two-factor authentication (2FA) standard
- ✓ Role-based access controls
- ✓ Single Sign-On / SAML (Enterprise)
- ✓ Annual penetration testing by external provider



Research recruitment at scale

Time to ditch the spreadsheets. Build and manage your own research panel with the tools and automations you need to take your research recruitment to the next level.



Recruit more participants in less time

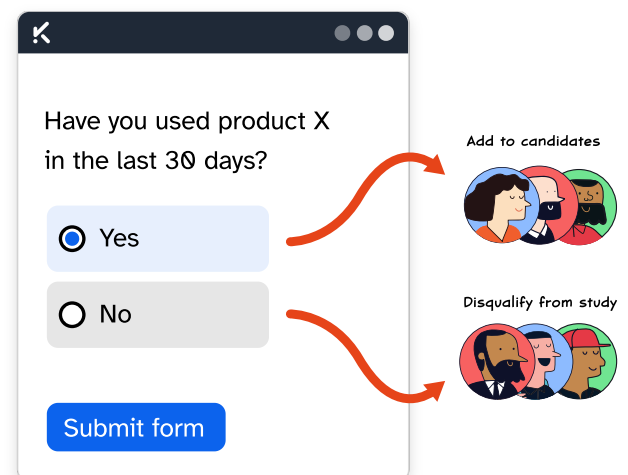
Participant Kit lets you build your own internal research panel so you can remove bottlenecks and drastically reduce recruitment times and 3rd party recruiter costs.

- Precision screening and segmentation
- Create shareable recruitment surveys so people can learn more and sign themselves up
- Real-time analytics on panel numbers and usage

Know your candidates from your can't-didates

Send advanced screeners with qualifying logic. Screen candidates from your panel before you add them to a project.

Not in your panel? No problem - create screeners directly in your study and build a list of candidates without ever touching your panel.



Data quality

- Auto de-duplication on imports and form submissions
- Anti-spam measures to block bot infiltration
- Validate data at point of entry

Panel management

- Track where panelists joined from automatically
- Panelists can update their own info without logins
- Merge and skip imports from external sources



Get participants ready for research

Put participant preparation on rails so you can ensure everyone is following your safeguarding process while keeping their data safe and secure.



- ✓ Invitation sent
- ✓ Informed consent signed
- ✓ NDA signed
- ✓ Scheduled the session
- ✓ Reminder sent

Here's how we make participation painless

- Consent forms, NDAs and screeners with branch and skip logic
- Context aware templates to enable project setup in minutes
- Seamlessly integrate your favourite scheduling tools
- Powerful workflows to automate your research admin
- 1-to-1 email with participants. Develop a relationship

Free yourself from repetitive admin

So much time is wasted checking emails, updating spreadsheets and finding out if things have been signed. Participant Kit does the heavy lifting for you, so you can focus on the research.

Workflows & automation

- Workflows trigger automatic next steps
- Auto-progress to scheduling or additional documents
- Reusable templates for rapid project setup

Demo project / Discovery interviews				
Participants Forms Candidates				
☐	Participant	Last contacted	Consent	NDA
☐	 <u>Emma</u>	Not contacted yet	--	--
☐	 <u>Marvin</u>	Not contacted yet	--	--
☐	 <u>Chris</u>	Not contacted yet	--	--
☐	 <u>Omar</u>	Not contacted yet	--	--
☐	 <u>Aparna</u>	Not contacted yet	--	--

Tracking & dashboards

- Project dashboards with real-time progress
- Participant audit trails logging all interactions
- Email bounce reporting and spam detection



Make your workflow work for everyone

Not everyone speaks English. Some people don't have an email address. Others need assistive technology like a screen reader to get online.

If anonymity is important, they might feel anxious about the consequences of talking with you.

We believe these things shouldn't exclude anyone from taking part in your research.

"Accessibility was an issue with our old forms. Our accessibility team use Participant Kit regularly, so I know it's good."

Senior User Researcher, Major Gov. Dept.



Here's how we support inclusive research

- WCAG 2.2AA compliant participant experiences as standard (third-party audited)
- Multi-lingual forms including Welsh. Participants can switch languages in real time
- Supports screen readers (VoiceOver, NVDA, JAWS) and screen magnification up to 500%
- Dyslexia-friendly mode and one-thing-per-page design for clarity

Make it easy to change their mind

Participant Kit removes barriers for participants to exercise their rights. We streamline what happens next, so enabling those rights is painless.

- Give participants control over their own information with Participant Portal
- Right to be forgotten
- Easy to withdraw consent



Research governance automation

Participant Kit has security and compliance built in. Get peace of mind that you're meeting all necessary data and privacy regulations, and increase participants' trust in your organisation.

Activity feed

Participants activity in Discovery Workshop

Research recording added: **B5 Interview Audio**

[B5 Interview Audio](#)

Recorded on **22 Jun, 2023** and is due to be deleted **22 Jun, 2024**

7 months ago

Was sent email "**Thanks for completing the form for 🧑🧑 Mutual NDA**"

▶ [See the contents of the email](#)

7 months ago

Participant signed **🧑🧑 Mutual NDA**

7 months ago

Participant was sent email [Take part in our research](#)

asking for signatures for **🧑🧑 Mutual NDA**

🖱️ **Sign the NDA** last viewed: Wed, 22 Jun 2023 at 03:12:49 PM

7 months ago

Put your data management and security on rails

Automate data collection in audit trails and make these available via Subject Access Requests. Scale safeguarding and assessments on project creation such as DPIAs or ethical review processes.

- Participant audit trails
- True GDPR ready
- Data Subject Access Request (DSAR) and Freedom of Information (FOI) ready
- Reminders to delete data
- Link consent to research recordings for complete traceability

"It's like a single source of truth for all our participant data."

Senior User Researcher, UK Government



What onboarding looks like

1

Week 1

Account setup, panel configuration, data import. Intensive support as you build your workflow.

2

Weeks 2-3

First studies running, getting comfortable, refining templates based on real usage.

3

Ongoing

Things settle down. Support when you need it, otherwise the system just works.

4

Quarterly check-ins (optional)

Scheduled calls to review how things are working, address any issues, and plan ahead.

Additional support options

- Concierge onboarding
- Monthly drop-in clinics
- Dedicated Slack channel
- Data migration
- Dedicated account manager
- Priority support
- Training sessions for wider team
- Hands-on technical support

ReOps Accelerator: Guided onboarding programme

For a more structured approach, our 6-week ReOps Accelerator programme provides hands-on guidance from setup to rollout.

- Custom environment setup
- Panel migration and data mapping
- Team onboarding sessions
- Weekly check-ins during pilot
- Live testing with real workflows
- Rollout planning for wider team



Offboarding process

We require 30 days written notice if you want to close your account with Participant Kit.

If you decide to leave the product we will provide you with your entire history of participant records, including signed consent, audit trails and links to recordings to date, in both human and machine readable formats, for your own archives.

Any live consent agreements outstanding at the point of deletion will be redirected by Participant Kit to a URL nominated and owned by the Customer, until the data retention period for that agreement is reached.

Upon receiving notice, in writing from the Customer that the downloaded data has been received and that the required URL is in place, we will permanently delete all the account and all associated information from the application.

Any agreements in place will continue in force until we receive notice and your data is deleted.

Technical requirements

The use of Participant Kit requires an internet connection and access to a supported web browser (Microsoft Edge, Firefox, Chrome, Safari or Opera).

Participant Kit will also work with other Webkit or Gecko based browsers, but is not officially supported.



Exceptional support

We pride ourselves on exceptional support. We can even put you in touch with other government customers who can vouch for our exceptional support.

"The support we've had has been fantastic. It doesn't feel like Participant Kit is this faceless company that we're dealing with."

Research Ops Lead

Major Gov. Dept.

While Participant Kit is designed to be easy to use, we offer a range of support options as standard.

- Help documentation
- In-app messaging
- Email (with tickets)

We always endeavour to respond to support calls and issues as soon as possible (regardless of office hours). Our standard SLA provides support Monday through Friday 09:00-17:00 GMT/BST, excluding UK national public holidays.

Service availability: We target 95% uptime. Service status and incident updates are available at consentkit.statuspage.io



Common questions

We address common concerns upfront so you know what to expect.

Where is our data stored?

Your data is stored in the UK and EU by default. We're GDPR compliant with full audit trails, and we're trusted by UK government departments handling sensitive data.

Can you handle Data Subject Access Requests (DSAR) and Freedom of Information (FOI) requests?

Yes. Participant Kit maintains complete audit trails for every participant interaction. You can generate data exports for any participant at any time, making DSAR and FOI compliance straightforward.

Do you meet government security standards?

We're Cyber Essentials certified, listed on G-Cloud 15, and operate an ISO 27001 aligned Information Security Management System. We undergo annual penetration testing by external providers.

Do you have ISO 27001 or SOC 2 certification?

Not yet. We operate an ISO 27001 aligned Information Security Management System and have completed CSA STAR Level 1 self-assessment. We're open to pursuing formal certification where it makes sense commercially - if this is a requirement for your organisation, let's discuss.

Can I just ask questions without starting a procurement process?

Absolutely. We're happy to have a conversation about features, answer questions, or give you a demo with no expectation that you'll proceed. We understand you might be exploring whether this is even worth pursuing - that's a valid reason to get in touch.

Can I trial before going through procurement?

Yes. We offer a 14-day free trial with full access to all features. No procurement paperwork needed to try it out. Many teams use this to build a case internally before starting the formal process.

What does procurement usually look like?

We're on G-Cloud 15, which simplifies things significantly. Most government teams we work with complete procurement within a few weeks. We're happy to share how other departments have approached it - just ask.



Next steps

Curious but not ready to procure?

We know government procurement is a commitment. If you just want to understand the features, ask questions, or see a demo before deciding whether to pursue this, we're happy to have that conversation. No pressure, no paperwork.

We can also connect you with other government teams who've been through the process - sometimes it helps to hear how others approached it.

Want to try it first?

Start with a 14-day trial. No procurement needed, no commitment. See if it fits your workflow before you start the paperwork.

Get in touch

Email: ben@participantkit.com

Book a call: savvyca.com/benaldred/chat



Annex: See what participants see

For many teams, the participant experience is just as important as the admin experience. We've set up two guided demos that walk you through the key features.

PANEL RECRUITMENT

Build your research panel

See how participants sign up to join your panel. This guided walkthrough shows you:

- Mobile-first, accessible design (WCAG 2.2 AA)
- Custom branding to match your organisation
- Profile fields and screening questions



bit.ly/pk-panel



INFORMED CONSENT

Granular consent that participants understand

Experience our consent form builder in action. This demo highlights:

- Granular permissions - participants choose what they agree to
- One thing per page for clarity and comprehension
- eIDAS compliant digital signatures

bit.ly/pk-consent