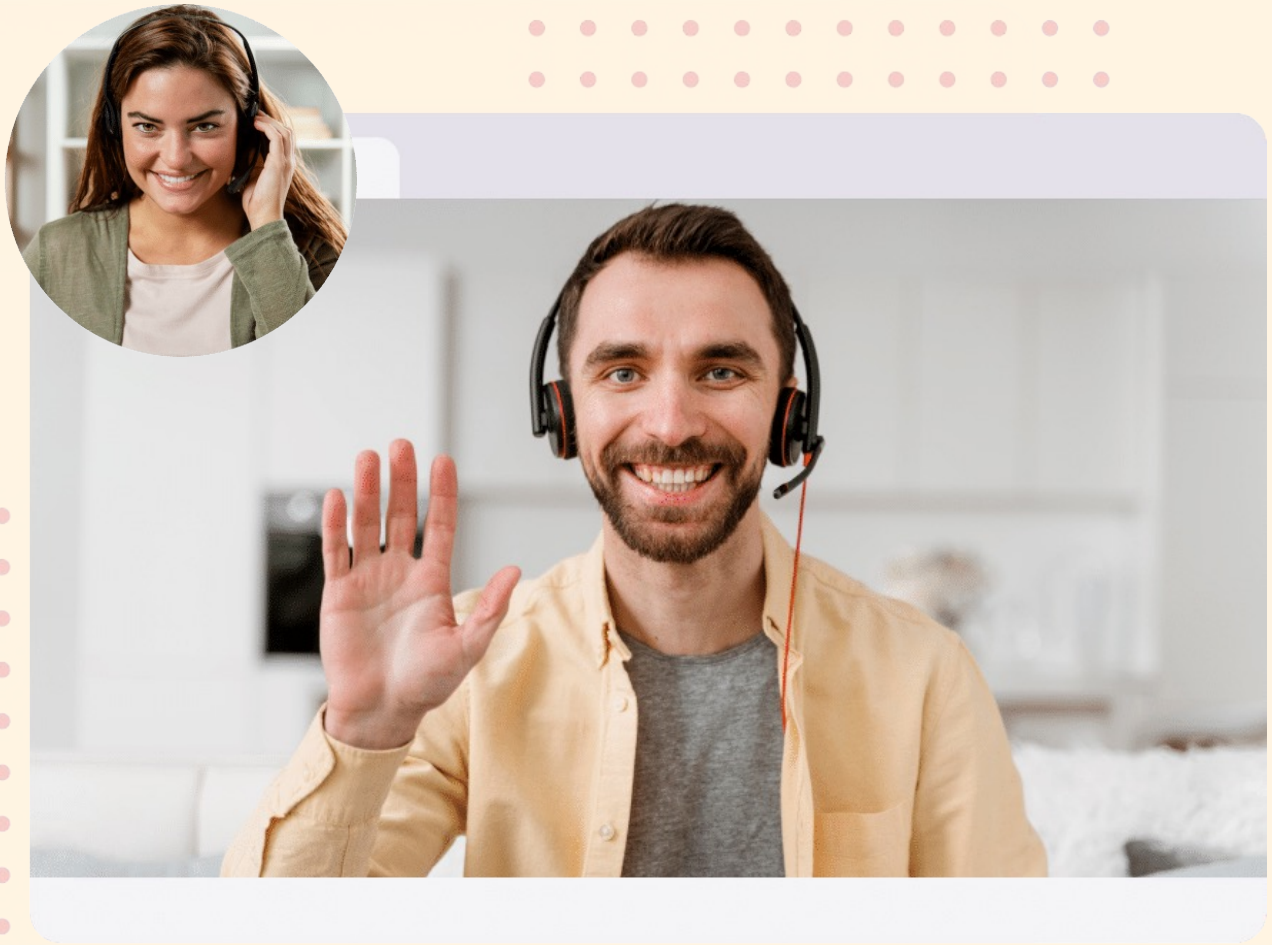


Instruction Guide

HEARSAY

Welcome to Hearsay.

You have been invited to join a Hearsay interviewing team - *fabulous!*

Hearsay is a cloud based research conversation and management tool.

This Instruction Guide will help you through project setup from inviting team members, having your conversations to editing transcripts.

Should you need any further help you can talk to me via live chat in the platform.

Cheers,

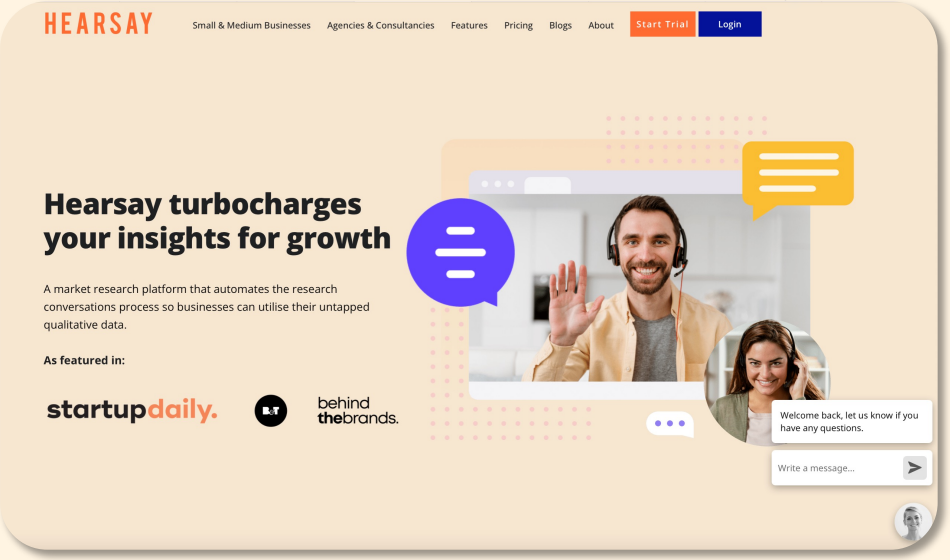
Lizzie X

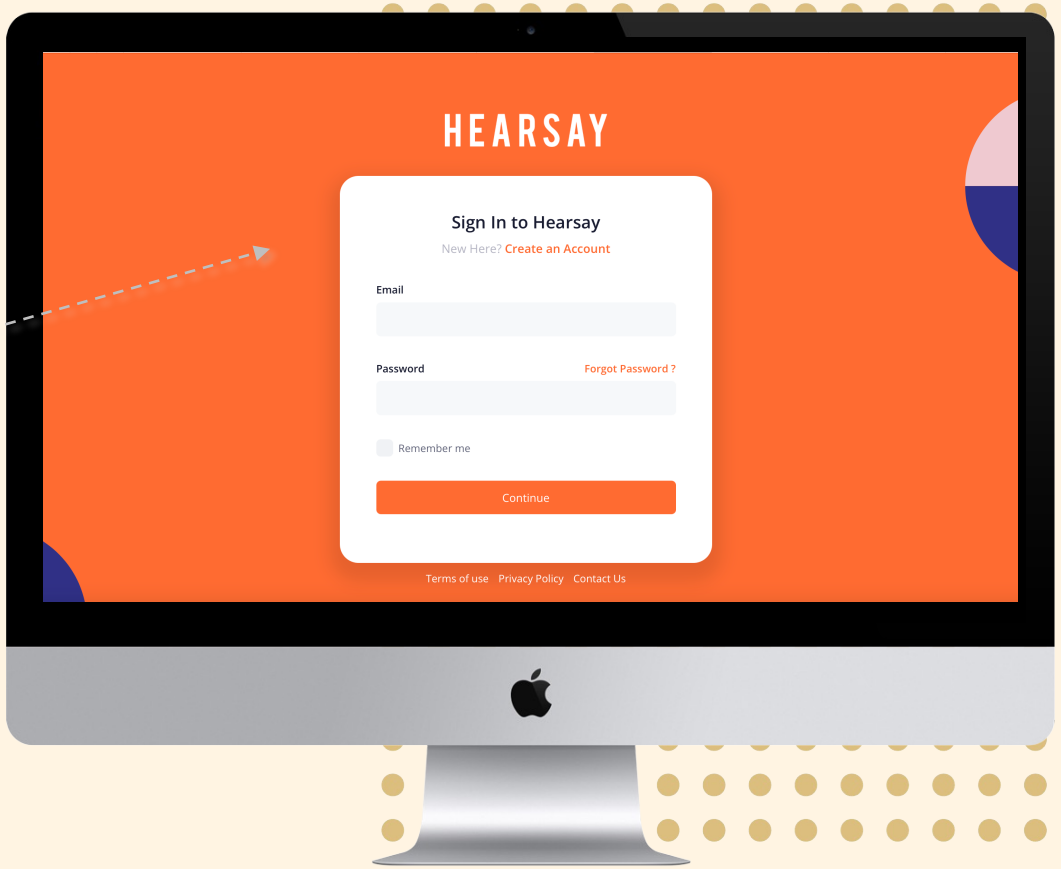
Hearsay Helper

Sign in to your account.

Once you have verified your email and set a password you can log into your account.

Access the login screen via our homepage at **hearsay.io**





Your Company Dashboard.

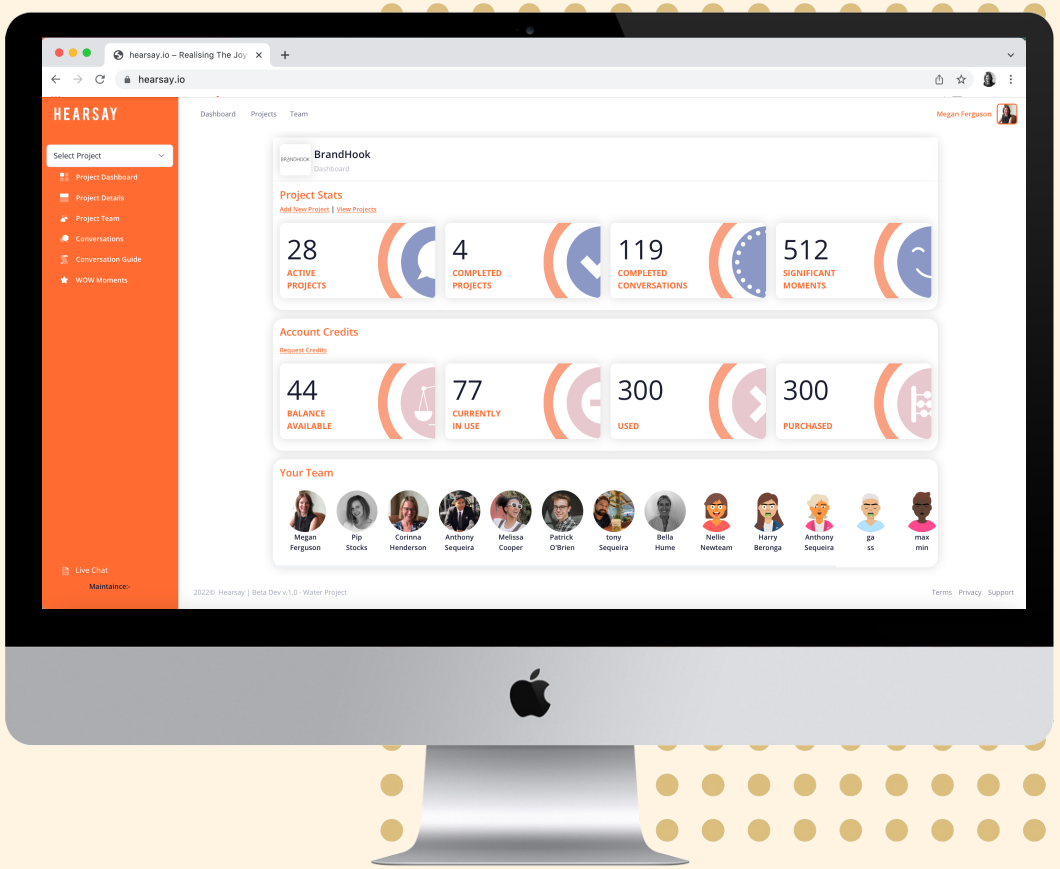
The Hearsay Dashboard is the central place for you to set up and access all your projects.

As an Account Owner or Project Lead, you can set up your first project, purchase conversation credits and invite team members to help you out.

As an invited team member, this is where you'll access the projects you'll be part of, view the interview guide and see the conversations you have been assigned to.

Once you start using Hearsay, the dashboard will be updated with the stats of all the projects your teams have run.

There are links to instructional videos through out the process to help you.

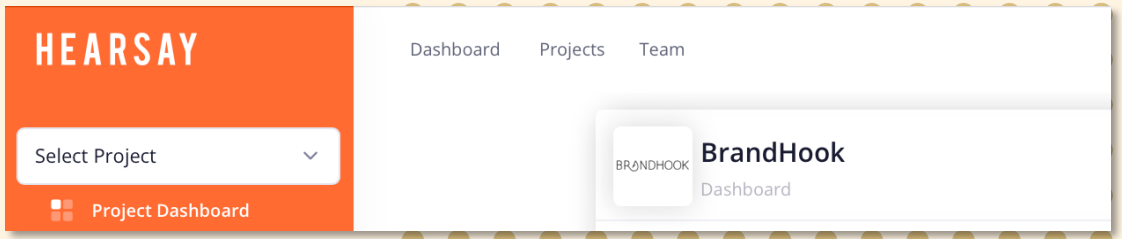


Company Dashboard Top Tabs.

There are **THREE tabs** at the tops of your dashboard.

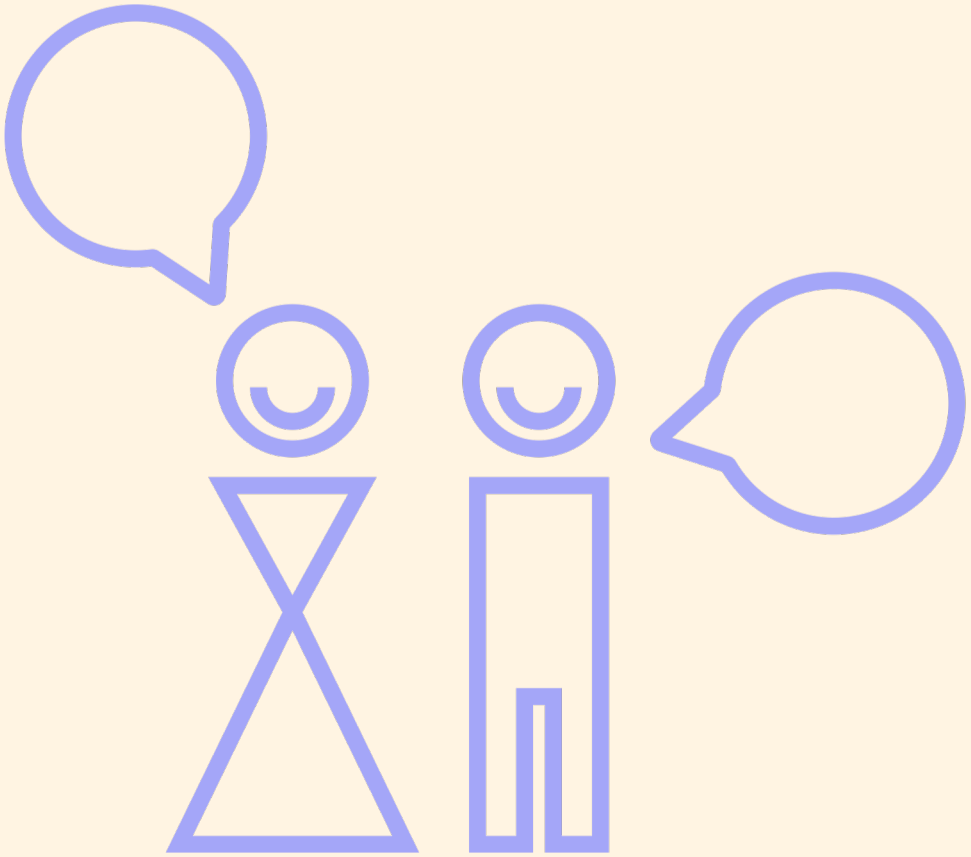
These are:

- **Dashboard –** which will return you to your central dashboard at any time
- **Projects –** where you can begin a new project and also access all your draft, current and past projects
- **Team –** Where you will view all members of your account team and can invite others to join (if you are the account owner or project leader)



THE DEMO PROJECT

YOUR PLAY SPACE



INSTRUCTION GUIDE

2021

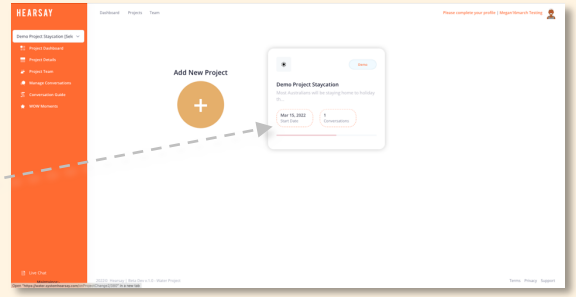
HEARSAY

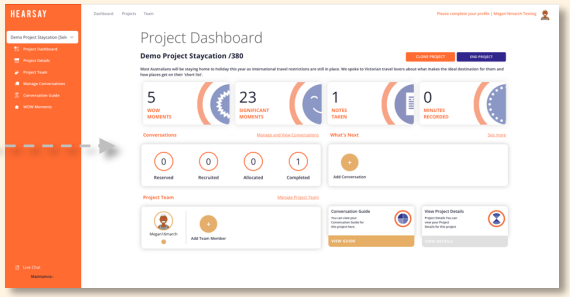
Project Staycation – Demo Project to play with

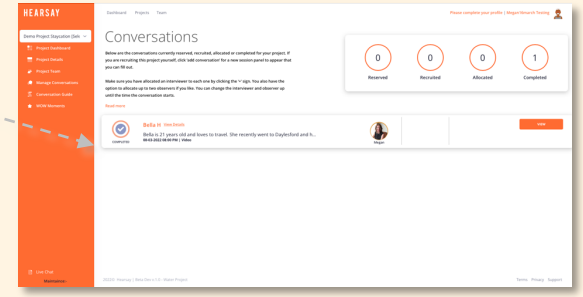
Have a play!

- There is a Demo project already in the system for you to play with.
- It is called Demo Project Staycation. You'll find it in your projects tab.
- **It includes:**
  - **A completed conversation you can view the video and edit the transcript**
  - **2 'reserved' credits you can use to schedule some test sessions**

So, invite some team members, set up some practice sessions and experience the magic of Hearsay … you are going to love it!!

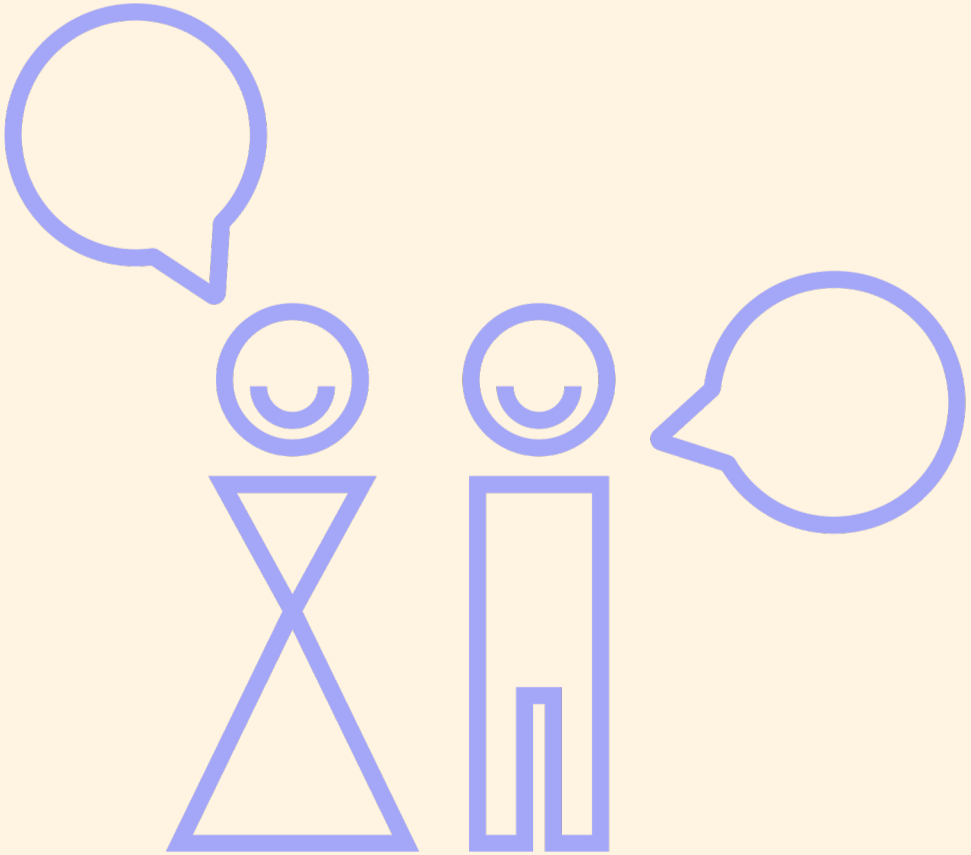






HEARSAY

SETTING UP A PROJECT



INSTRUCTION GUIDE

2021

HEARSAY

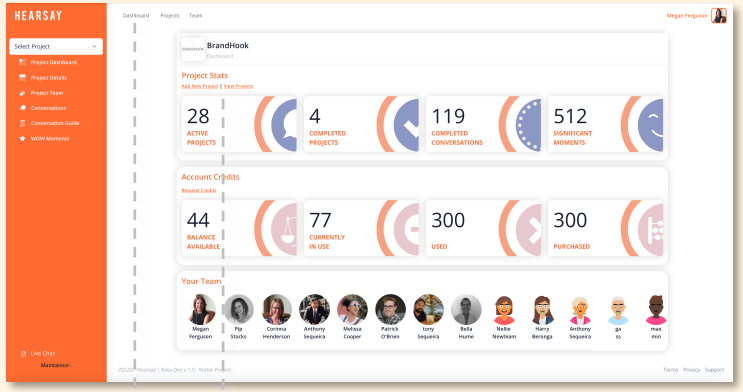
Project Setup.

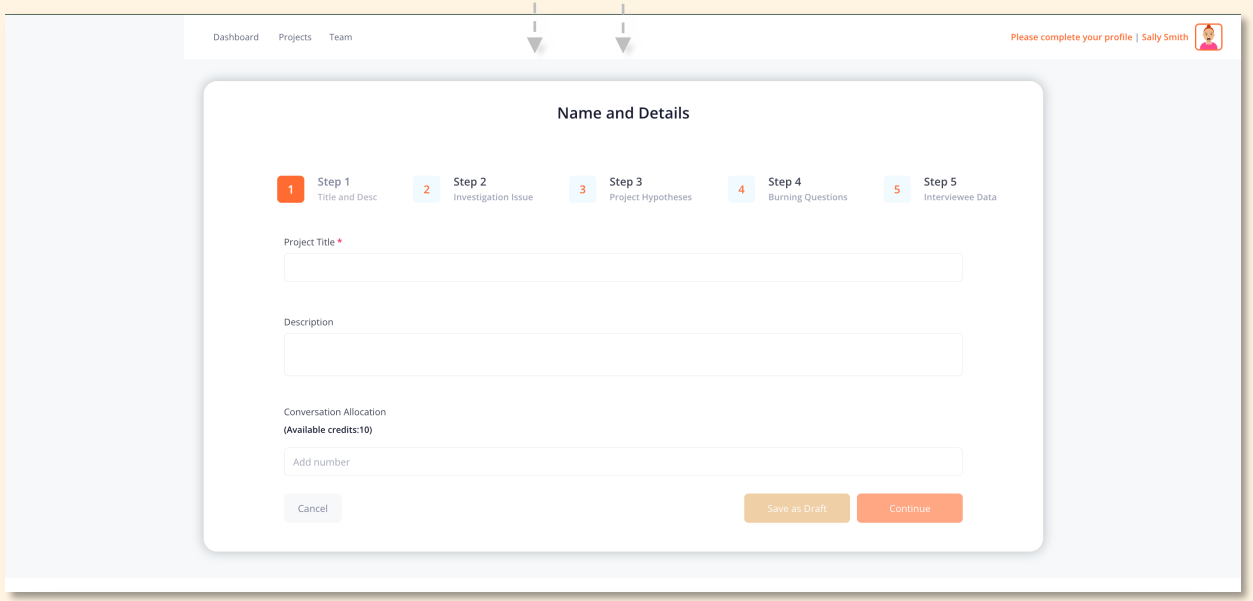
There are two ways access points to create a new projects:

1. From your company dashboard top tab, click ‘PROJECTS’, then ‘ADD A PROJECT’
2. Click the ‘ADD NEW PROJECT’ link under the Project Statistics header.

Either way, you will be presented with the New Project Setup Wizard to complete.

There are importance elements to include, we’ll go through them in detail over the next slides.

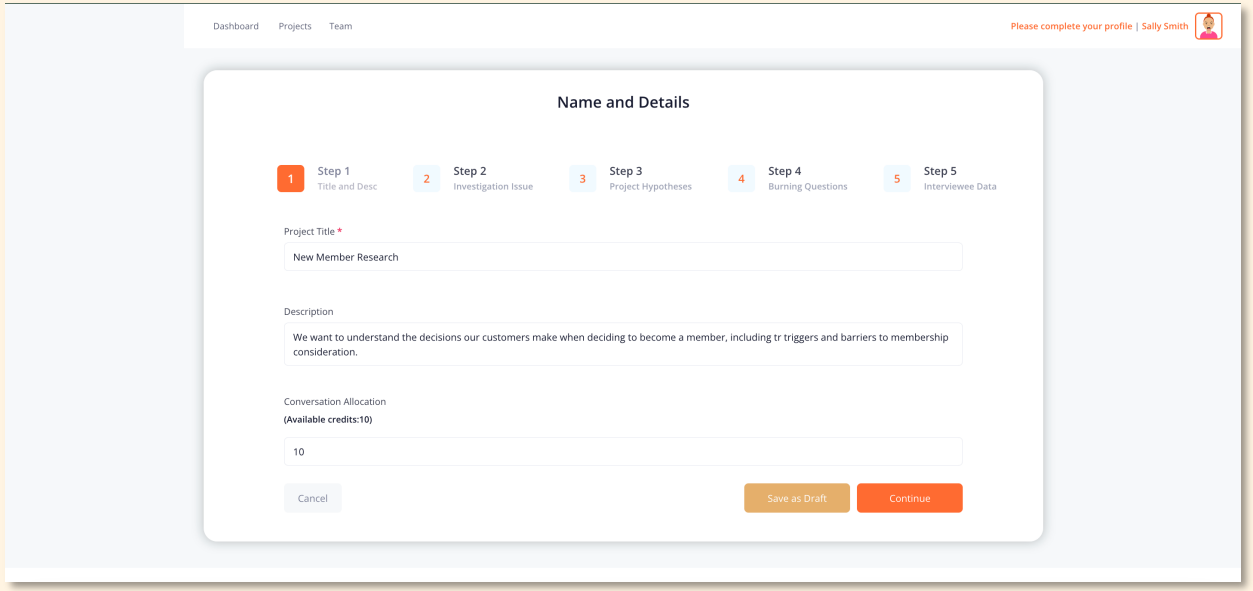




New Project Setup | Step 1 Name & Details.

STEP 1:

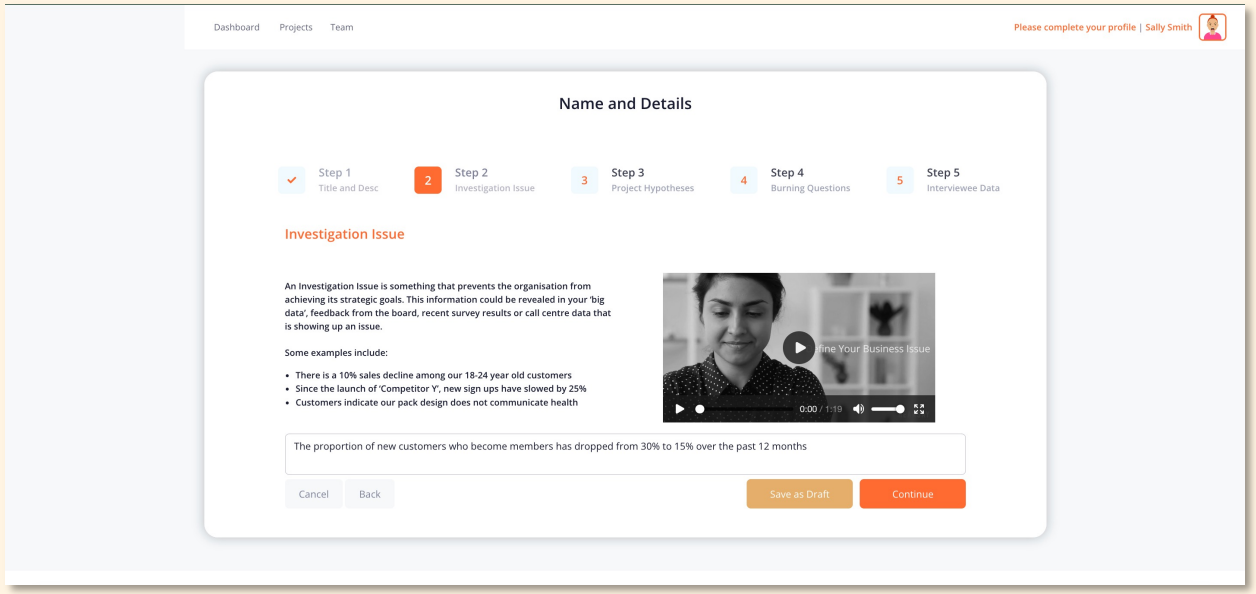
- Give your project name
- Write a short description of your project (eg. what this project is about, why you are doing it)
- Enter how many conversations you would like to have (if you need more credits go back to the Company Dashboard to request some)
- Continue or Save as a Draft



New Project Setup | Step 2 Investigation Issue.

STEP 2:

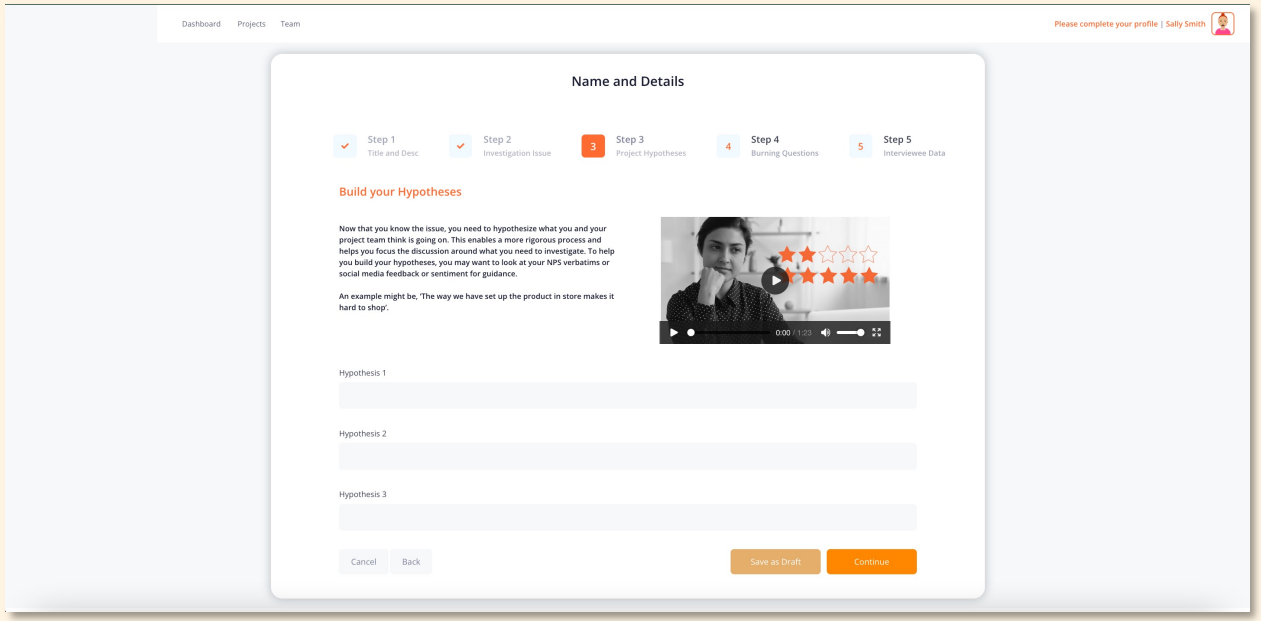
- Enter the objection of the research or the reason you are having the conversations. This ensures you and the team know exactly why you are having the conversations. What is the problem you need to solve?
- Continue or Save as a Draft



New Project Setup | Step 3 Hypotheses.

STEP 3:

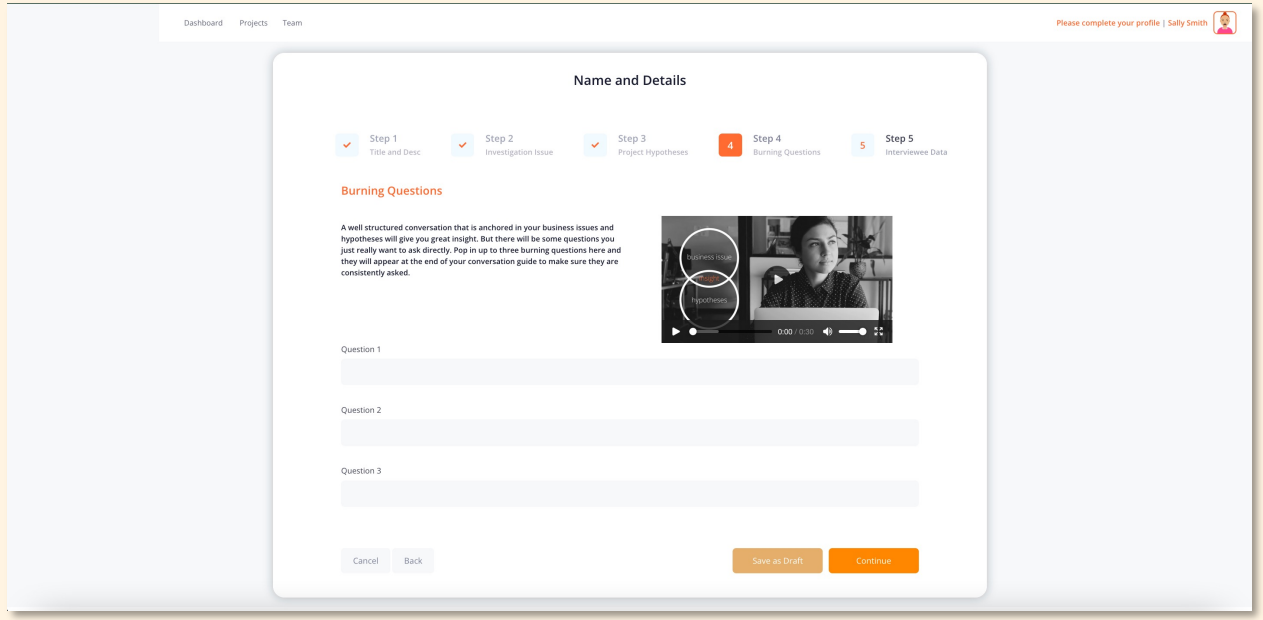
- Once your investigation issue is defined, we recommend you HYPOTHESISE what you think is going on. This enables a more rigorous process and focus on what is currently thought to be happening.
- We recommend you challenge these hypotheses ass part of your research conversation and so drop them into the conversation guide template
- You can add up to 3 hypotheses
- Continue or Save as a Draft



New Project Setup | Step 4 Burning Questions.

STEP 4:

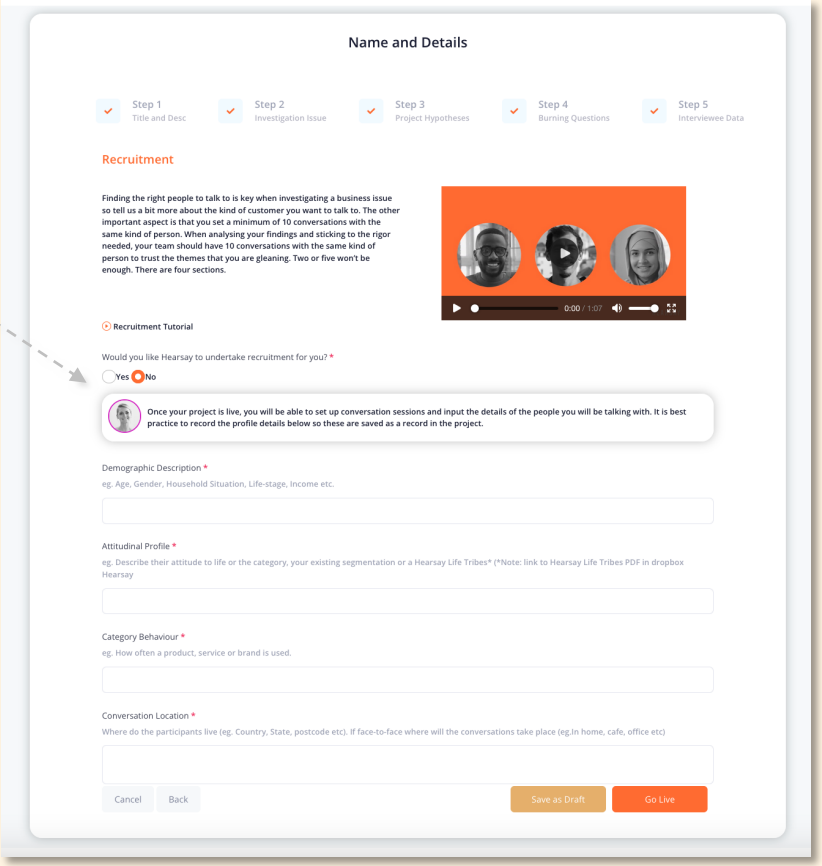
- A well structured conversation that is anchored in your business issues and hypotheses will give you great insight. But there will be some questions you just really want to ask directly.
- Pop in up to three burning questions here and they will appear at the end of your conversation guide template to make sure they are consistently asked.
- Continue or Save as a Draft

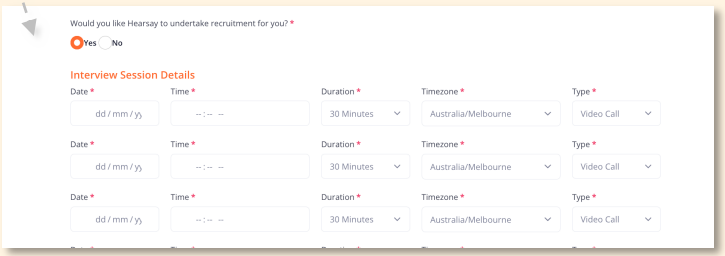


New Project Setup | Step 5 Interview Data.

STEP 5:

- You have two choices to make at this stage, or would. Would you like Hearsay to recruit people for your interview for you, or will you be managing the recruitment yourself?
- If you would like us to do it for you, you will outline the type of people we need to find, and we will back in contact with you to confirm the costs. We can use out own research panel connections or use your customer data base.
- You will then need to enter the session details (time/date) for each conversation so we know when we are recruiting for. Please use the interviewee's time/date/timezone details.
- Whether we do it, or you self-recruit, we need to compete the four info panels in this stage to capture an accurate record of the people involved in your project. In as much detail as possible complete the profile to include the Demographic, Attitudinal, Behavioural & Location characteristics of the people you would like to talk with.
- Continue or Save as a Draft



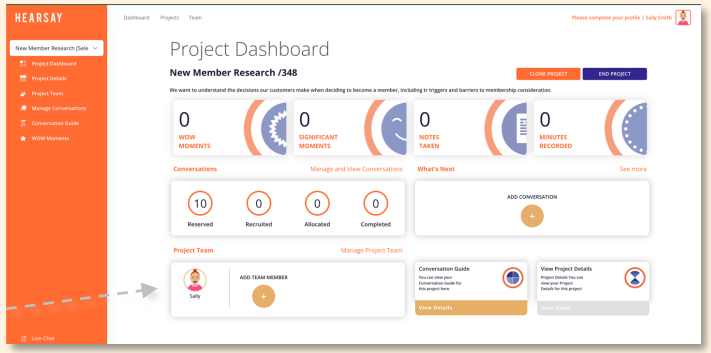


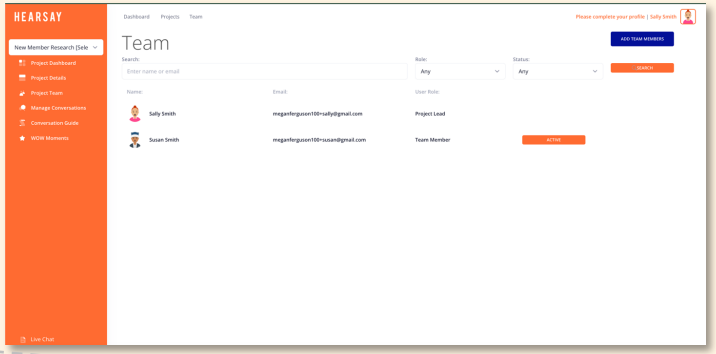
HEARSAY

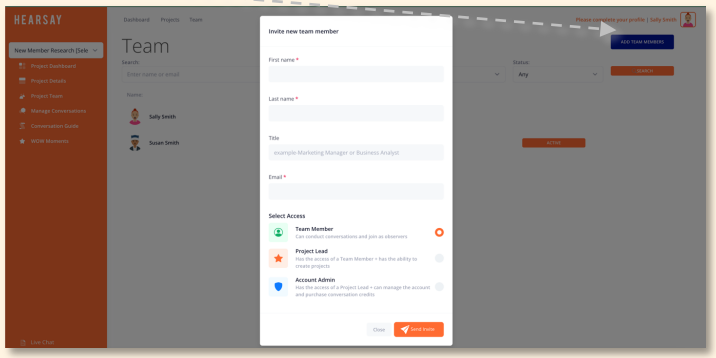
Build Your Project Team.

Once your project is live, go to the Project Dashboard and build the team to help you with this project.

1. In the Project Team panel, you will see yourself as the Project Lead.
2. Click the '+' sign to add people to the team. You will see everyone available in this list.
3. To invite new people, click the 'ADD TEAM MEMBER' button and send them an email invitation to join.



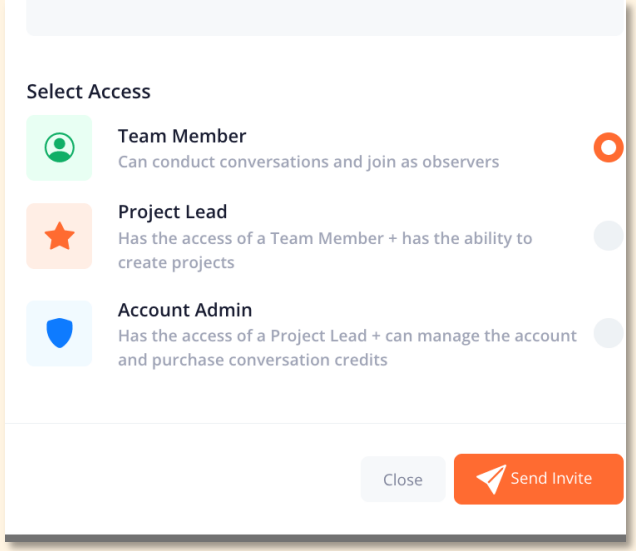




HEARSAY

Team Roles.

There are three roles on the Hearsay platform. When you invite a new person to join, you need to decide which role they will be. The role decides the access they have to conversations and project setup tasks.



Team Member Access:

- Only see conversations and project details on projects they are they are assigned to
- Can assign themselves to a conversation as either an interviewer or observer
- Can take notes and tag Significant Moments during the conversation
- Can edit their own notes.

Project Lead Access:

All the access of a TEAM MEMBER plus;

- Can create projects
- Can invite other people to join the team

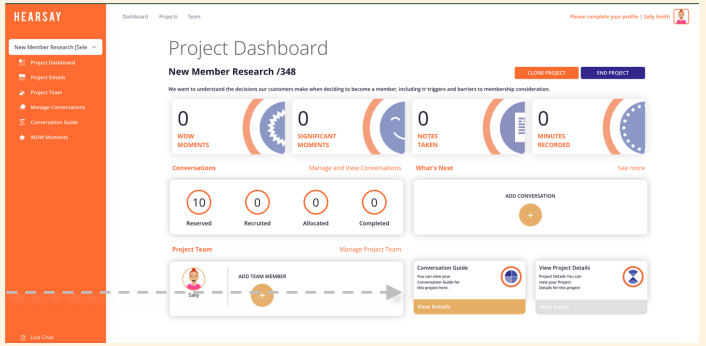
Account Admin Access:

All the access of a PROJECT LEAD plus;

- Can request conversation credits

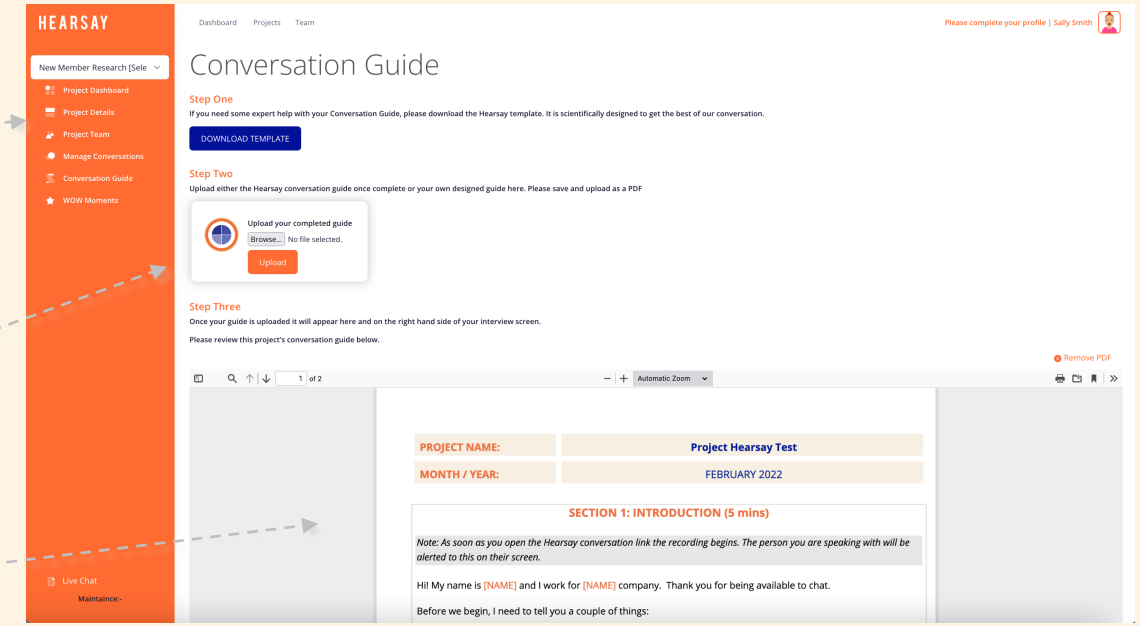
The Conversation Guide.

Access the Conversation Guide function via the side panel or ‘view guide’ from the Project Dashboard



There are three steps to creating a guide and uploading it so it appears on screen during your conversations:

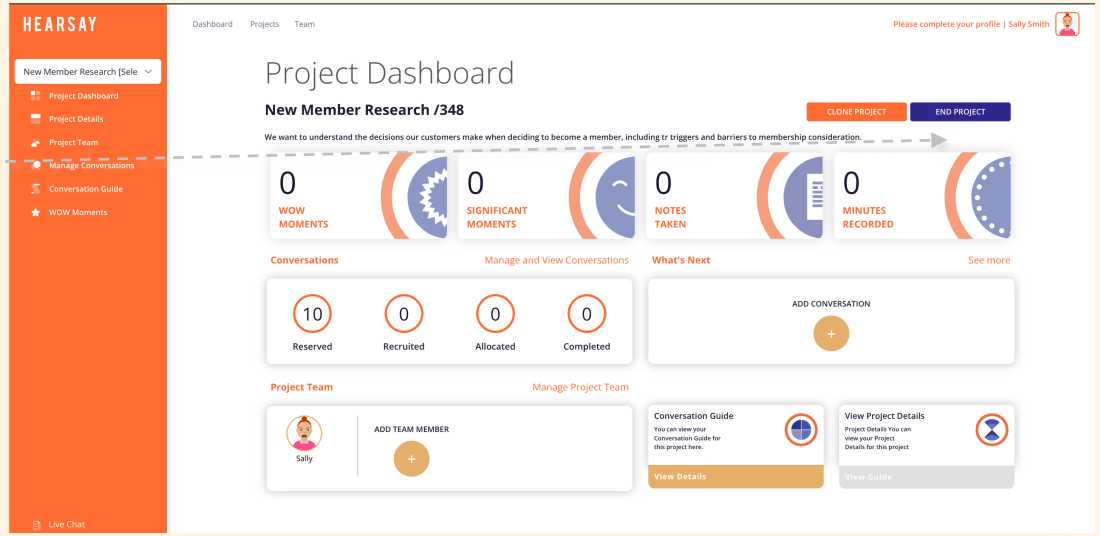
1. If you need some expert help with your Conversation Guide, please download the Hearsay template. It is scientifically designed to get the best of our conversation.
2. Upload either the Hearsay conversation guide once complete or your own designed guide here. Please save and upload as a PDF
3. Once your guide is uploaded it will appear here and on the right hand side of your interview screen.



Closing a Project.

Once you have completed all your project conversations, you should ‘close’ the project.

This takes it status from ‘active’ to ‘completed’ in the Project lists, it will also remove the project from being referenced as an Active Project in the Project Statistics panel.



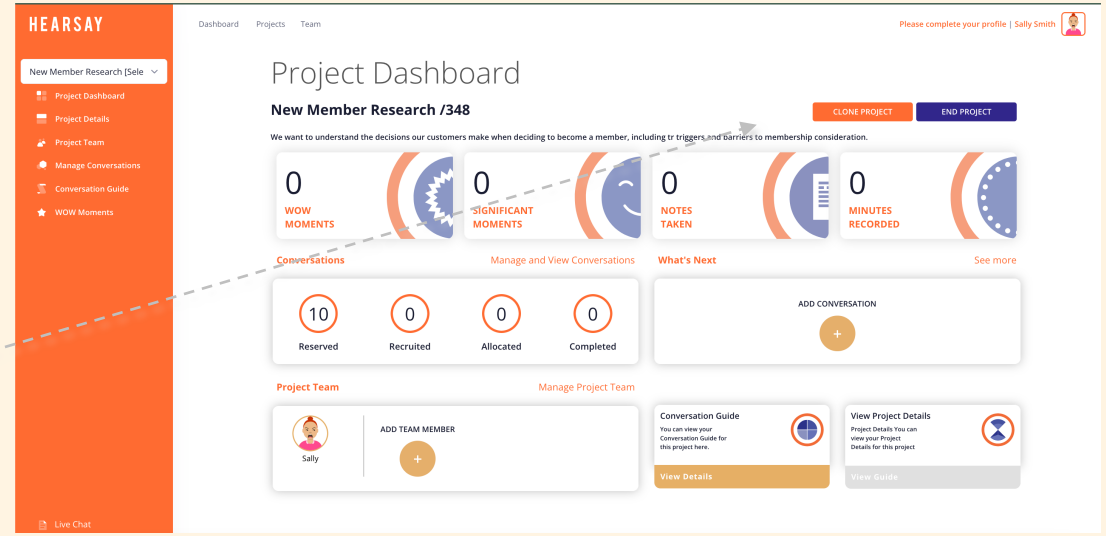
Cloning a Project.

As an Account Admin or Project Lead, you can see all the projects your teams have conducted via the **PROJECTS** tabs at the top of the screen.

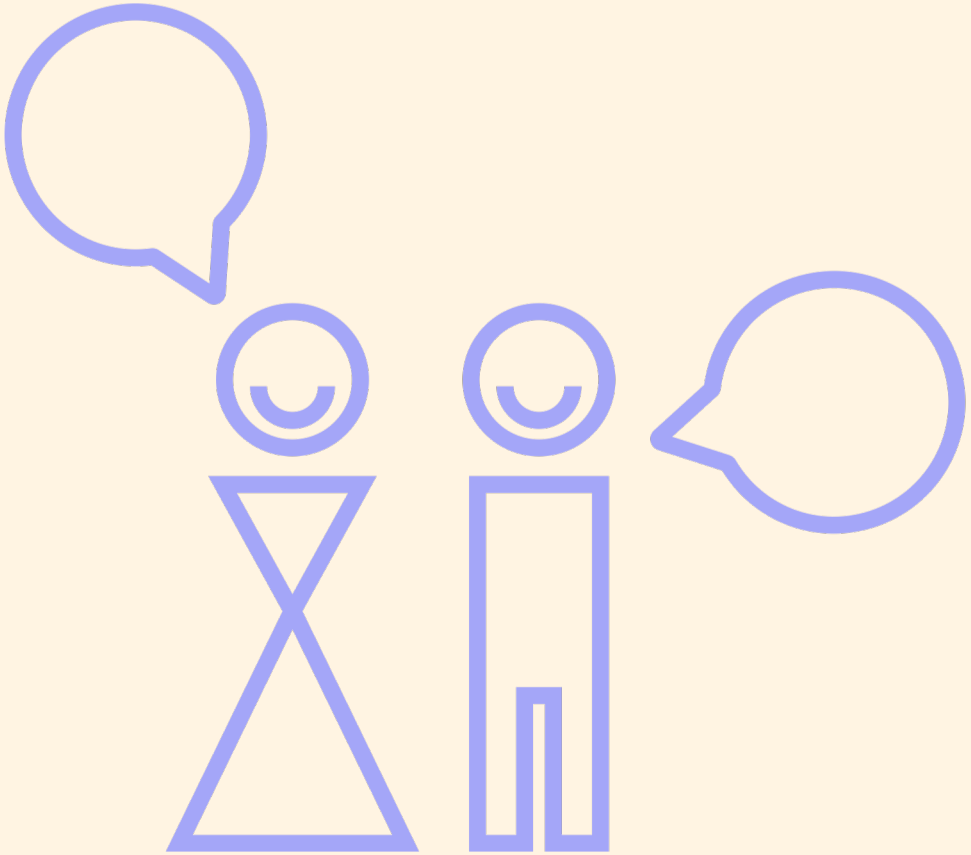
If you want to conduct a new project which has some things in common with a past project, can also **CLONE** a project.

Simply click to see the Project Dashboard, and select ‘CLONE” up near the Project Name.

This will save you time setting it up, and you can tweak it with the right details (session dates, project team etc) once it’s cloned.



SCHEDULE SESSIONS AND ALLOCATE INTERVIEWERS



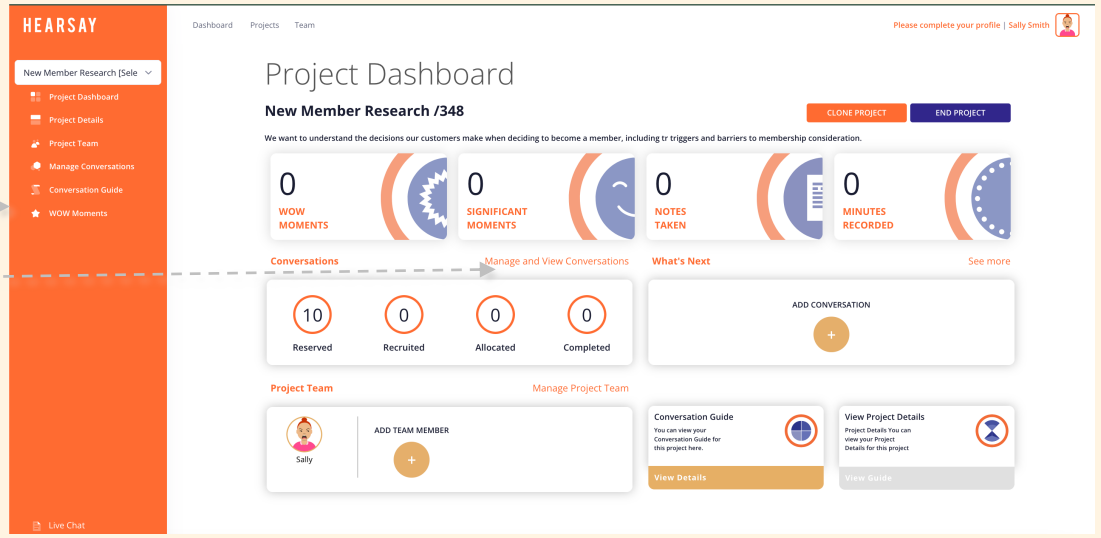
INSTRUCTION GUIDE

2021

HEARSAY

Scheduling Interview Sessions.

The conversations panels is accessed via the **PROJECT DASHBOARD** either in the orange side panel of on the main dashboard via the **MANAGE AND VIEW CONVERSATIONS** link.

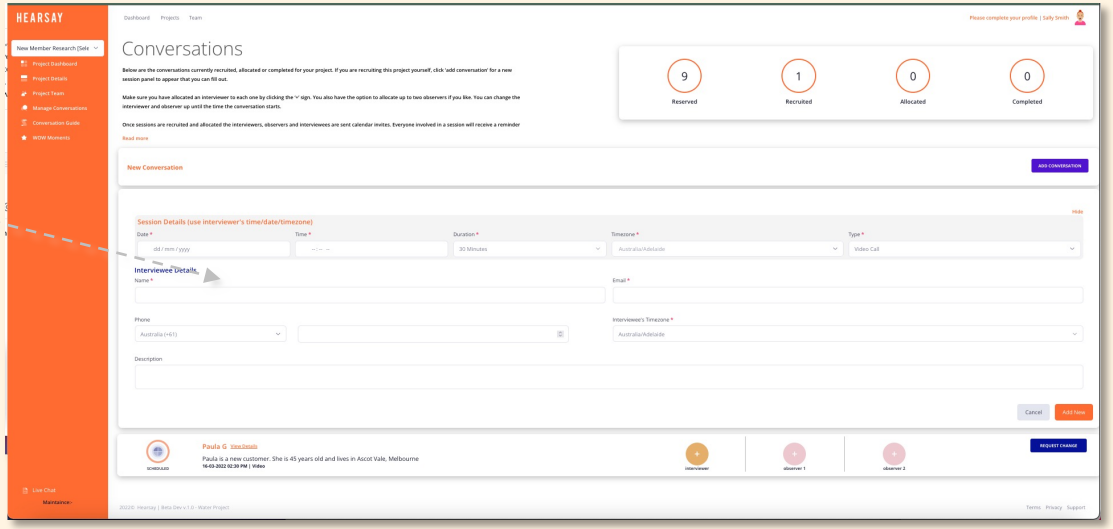


If hearsay is recruiting your interviews:

- The Project Lead will receive an alert each time a interview is scheduled in the platform. An interviewer and observer can then be allocated via the conversations panel.

If your are recruiting your own interviews:

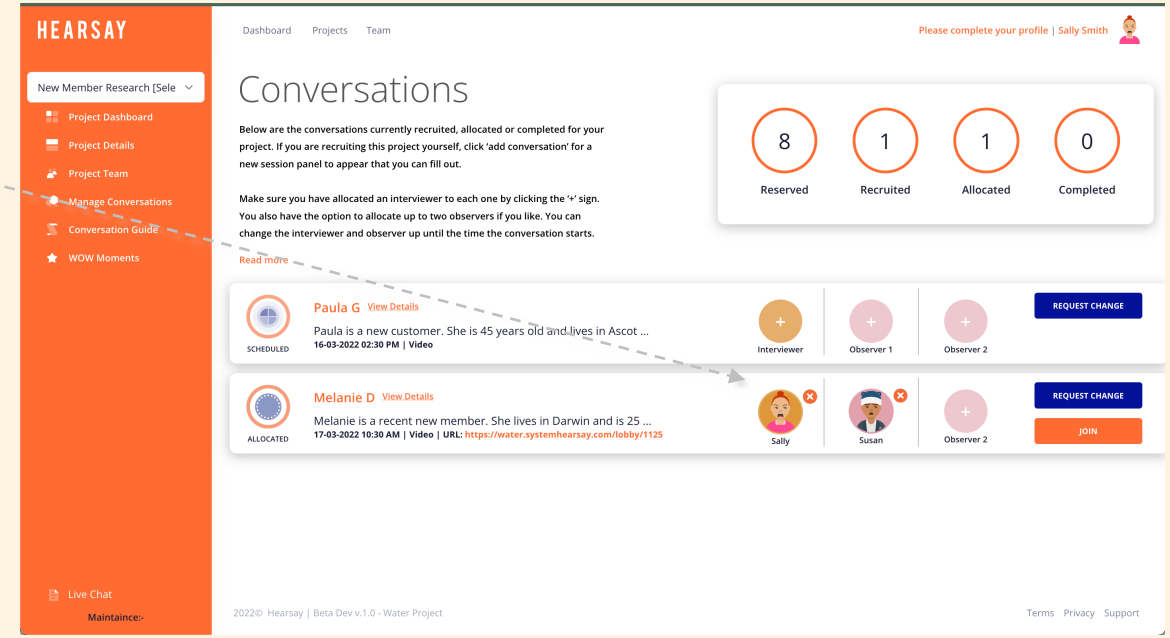
- Once your project is live, you will be able to set up conversation sessions and input the details of the people you will be talking with (Name, Date, Time Zone, Profile etc) You can make edits to the interviews from this page. Once loaded up and saved, your interviewee will receive a confirmation email/text



Assigning Interviewers and Observers.

ONCE A SESSION IS SCHEDULED YOU CAN ASIGN AN INTERVIEWER AND UP TO 2 OBSERVERS

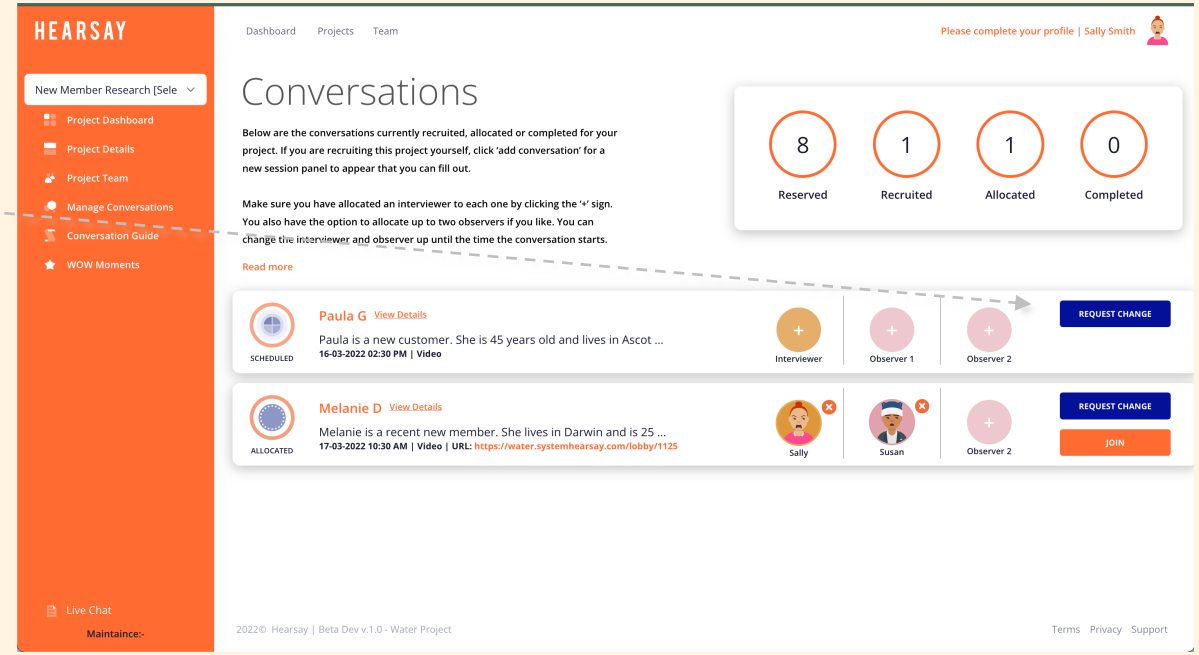
- Click the '+'
- You will see the available team members that have been allocated to the project
- If the team member is not visible check the following:
    - *Have they been invited /accepted the invitation?*
    - *Have they been assigned to the project?*



Requesting a change – when Hearsay is recruiting for you.

When the Hearsay team is recruiting people for your session, you may need to request a change to the time/date.

Please use the 'Request Change' button to alert us. It will take you straight to our live help feature for you to talk to our team.



Notifications.

Interviewers, observers and interviewees will receive the following email confirmation, calendar invites and text reminders about the sessions.

Project lead will be alerted via email when:

- You have a conversation that needs interviewers/observers allocated
- Video/Transcripts are ready to be viewed

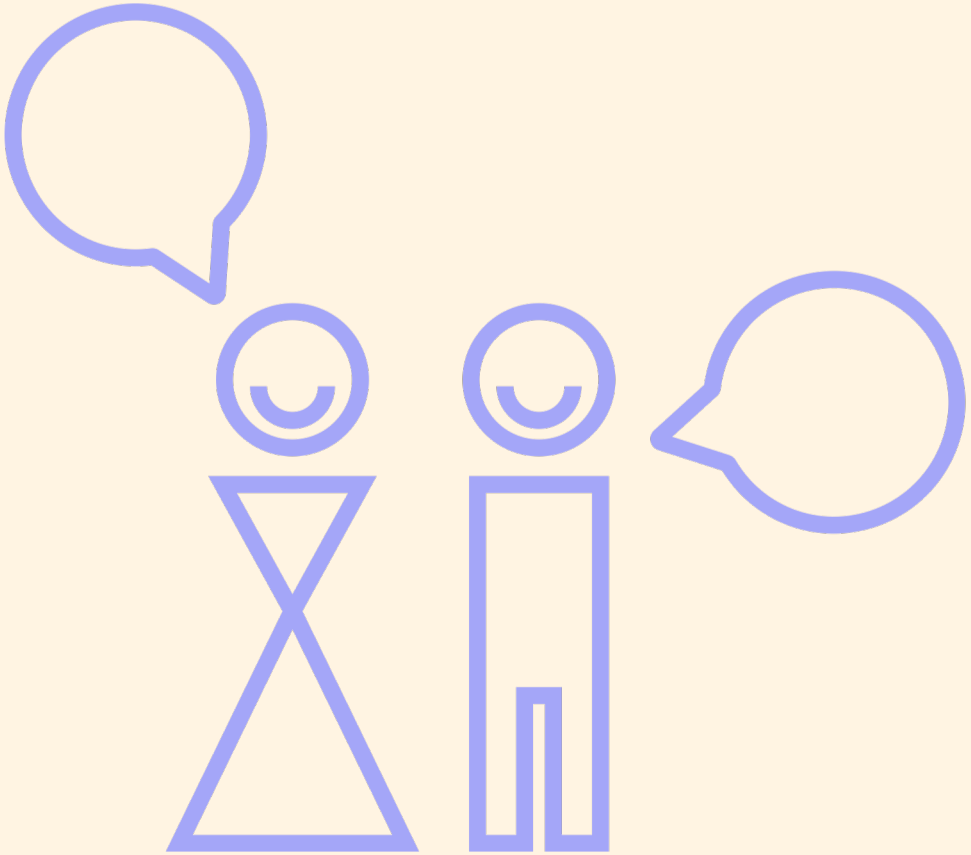
Interviewers/Observers will be emailed when:

- Scheduled to a session (calendar invite)
- Allocated or removed from a conversation, or a change is made to he session details
- 24 hours before the conversation (as a reminder)

Interviewees (customers) will be emailed/text when:

- A session is scheduled (with calendar invite)
- When a session in cancelled / updated
- When the conversation is within 24 hours
- When the conversation is within 1 hour

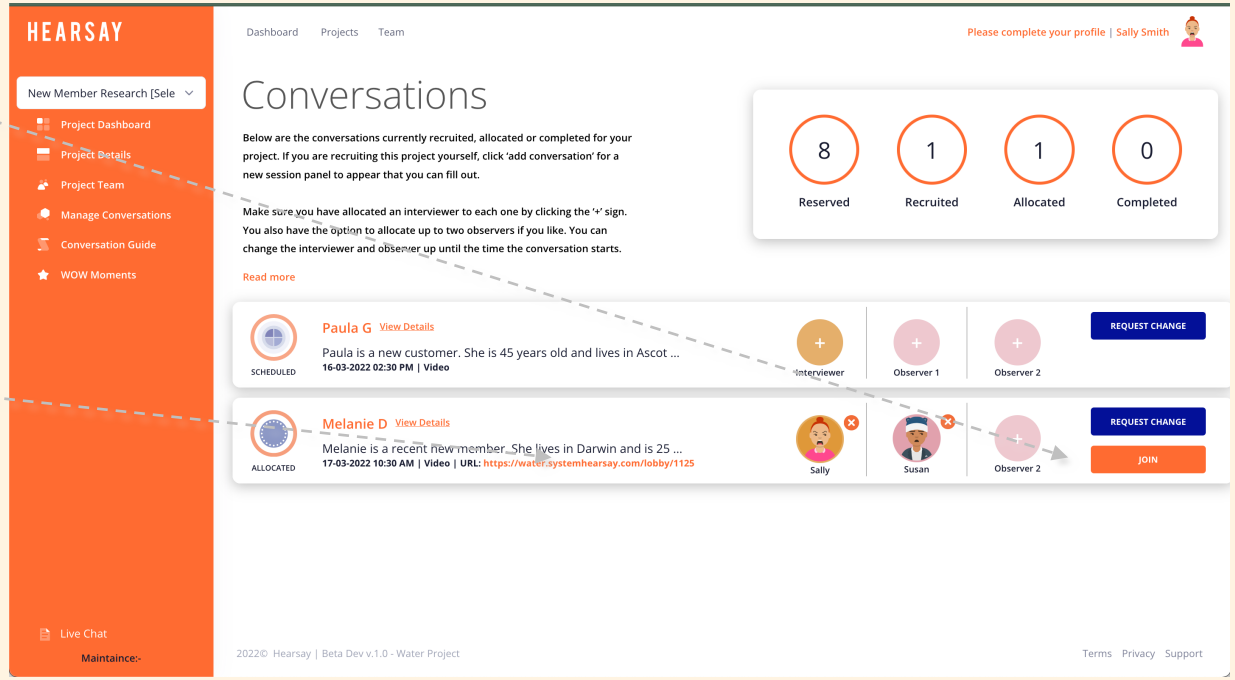
HAVING THE CONVERSATION



HEARSAY

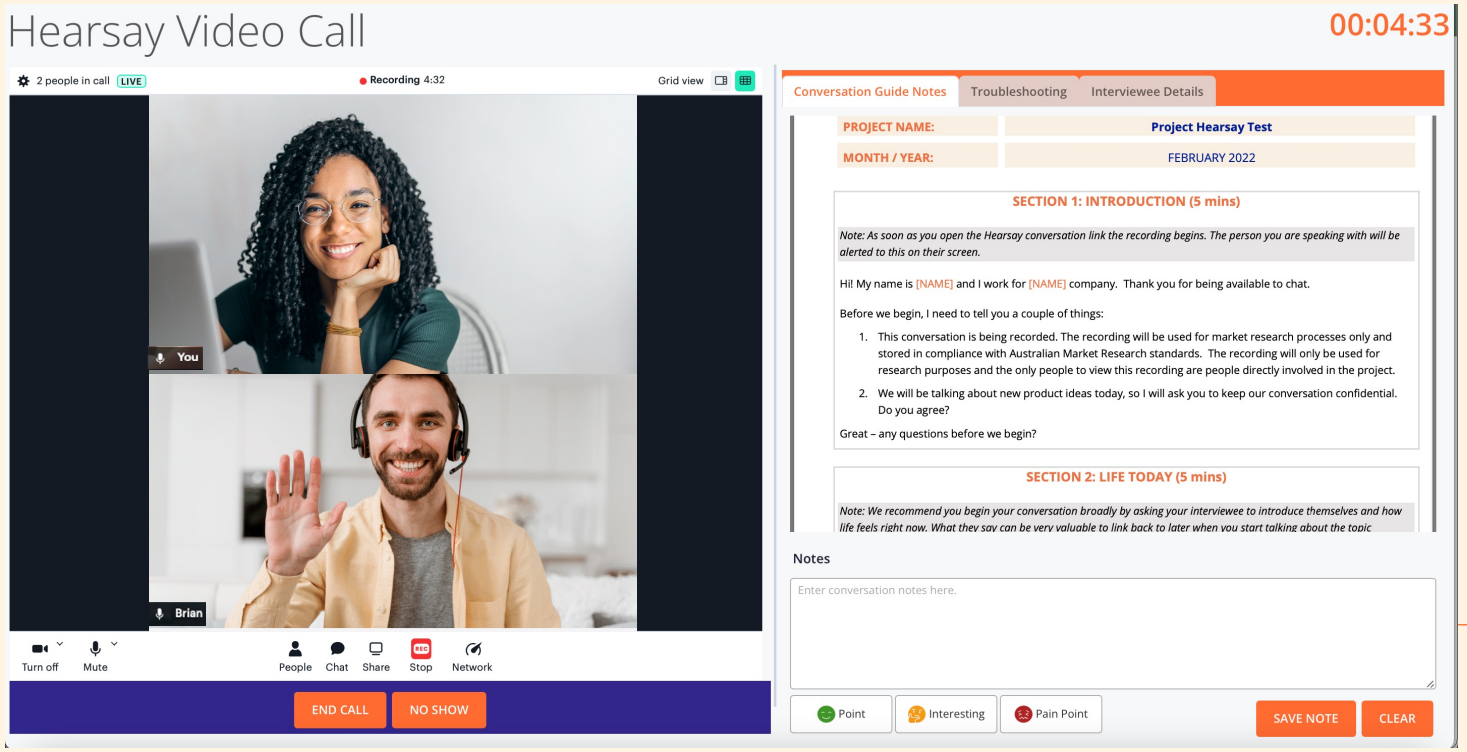
Joining the Call.

1. Interviewers and Observers log into Hearsay, and click the 'JOIN CALL' button.
2. You will also see the Room URL link in the session details. Should you need to, you can send this link to your interviewee to join the room. They will need to enter their email address to verify themselves to enter.



The Video Interview Screen

You and the person you are speaking with appear on the left hand side of the screen. Choose from Gallery or Speaker view



The Conversation Guide appears on the right hand side. Write it yourself or use our template is based on your business issue, hypotheses and burning questions and probes – it keeps your conversation flowing.

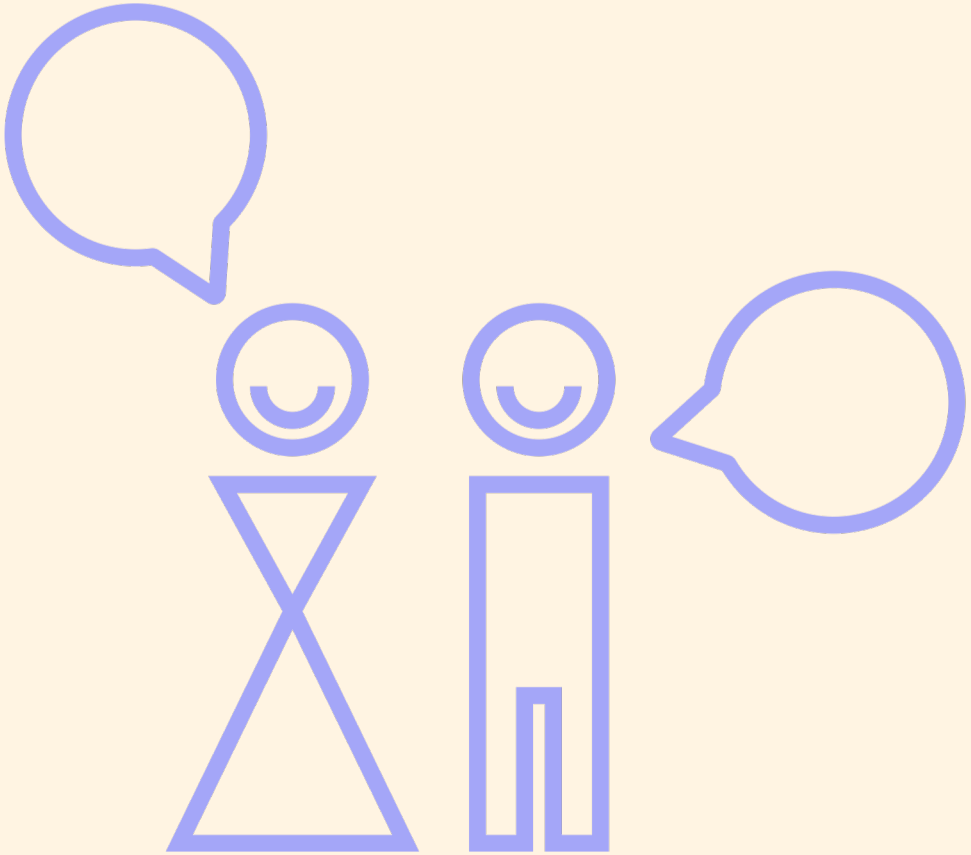
Record, Chat, Share screen tool bar

No need to take notes, throughout the conversation simply tag the relevant emoticon faces when you hear a 'good thing' , a 'pain point' or 'something interesting!'. These significant moments will appear time-stamped on your transcription.

If you opt to assign an 'observer', they can type notes throughout the session in the bottom right panel of the screen

HEARSAY

AFTER THE CONVERSATION



HEARSAY

WOW Moments.

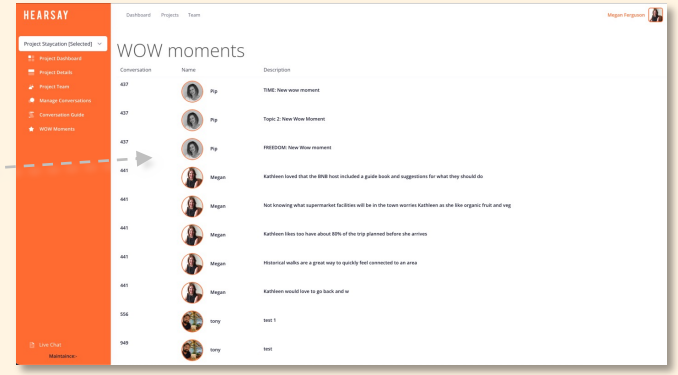
After your conversation, you will have lots of thoughts swirling around your head.

They may not always make sense and in fact they may even feel contradictory to your hypotheses, but they are intuitive feelings about how to solve your Business Issue.

We call these the **'WOW moments',** the things that made you sit up and pay extra attention in your conversation. And really where the strategic magic begins.

To ensure we capture your WOW moments and share them with other team members in an easy way, jot them down here before you leave to do something else or talk to your next customer.

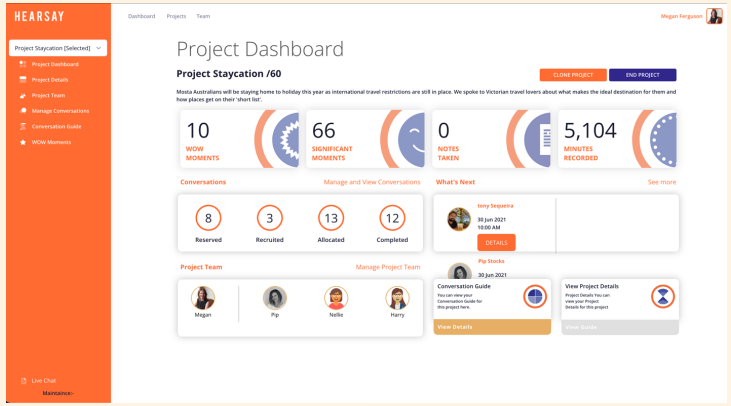
TIP: From the Project Dashboard side panel, you can view all WOW moments from across the project as they are entered. Our recommendation is that these can be copied and pasted into a spreadsheet, themed, grouped and summaries. This can provide a rich top-line of insights as they emerge from the conversation.



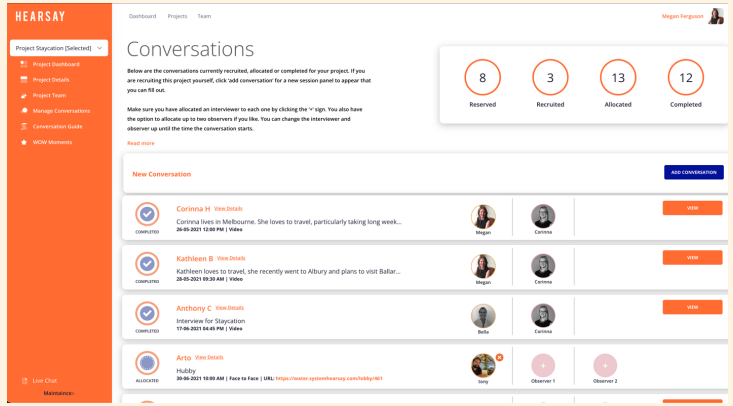
View Recording and Transcription.

With in a few hours (sometimes sooner), your conversation video recording and A.I. Voice-to-Text transcription will be ready to be viewed.

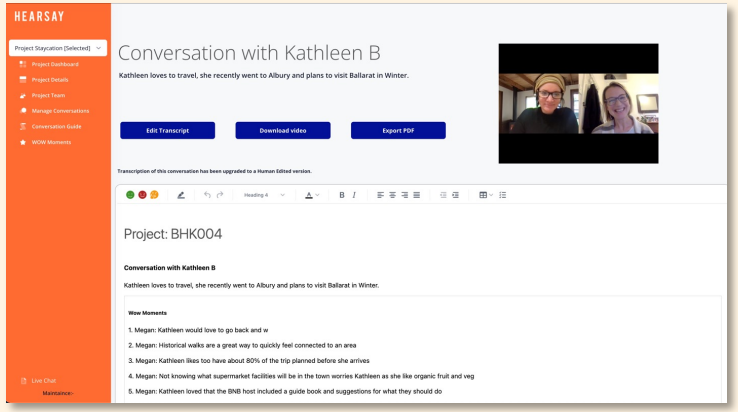
1. Access via the manage and view conversation panel on the project dashboard



2. Click ‘view’



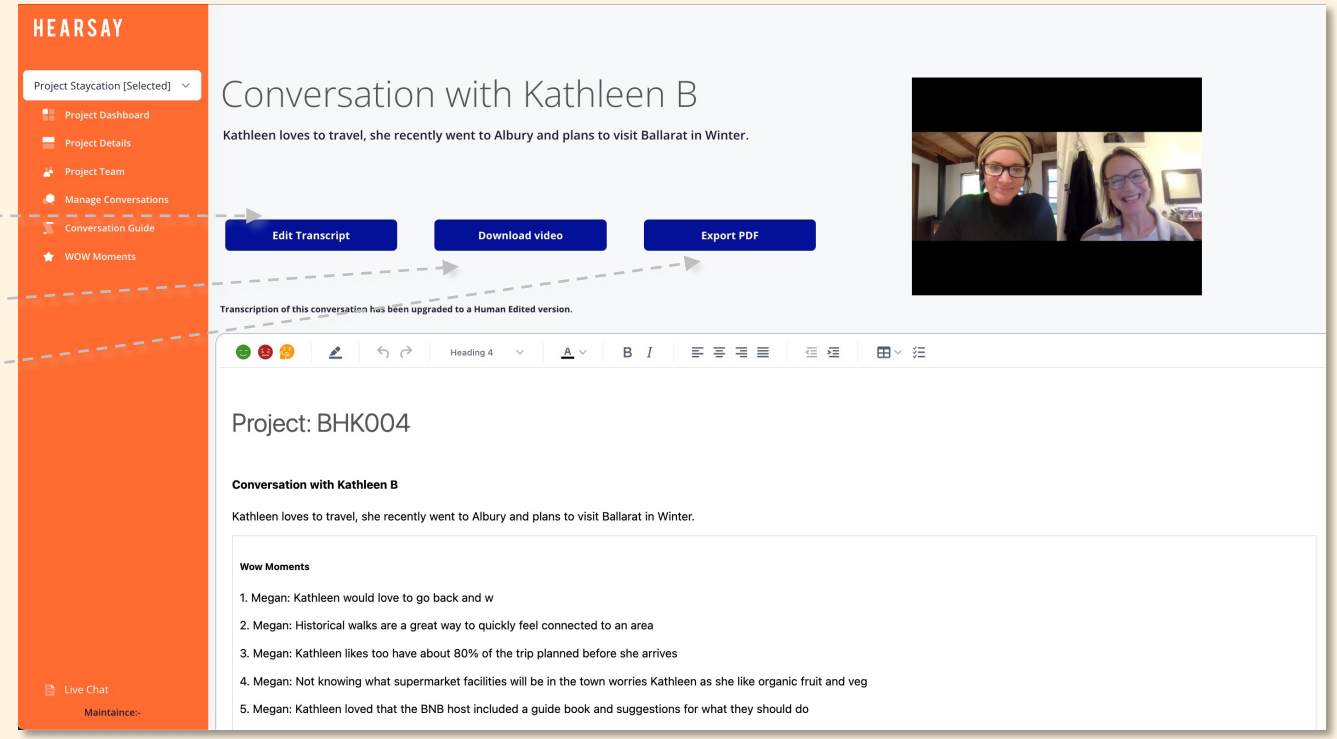
3. The video and transcription will appear



Editing and exporting.

From the video and transcription screen you are able to:

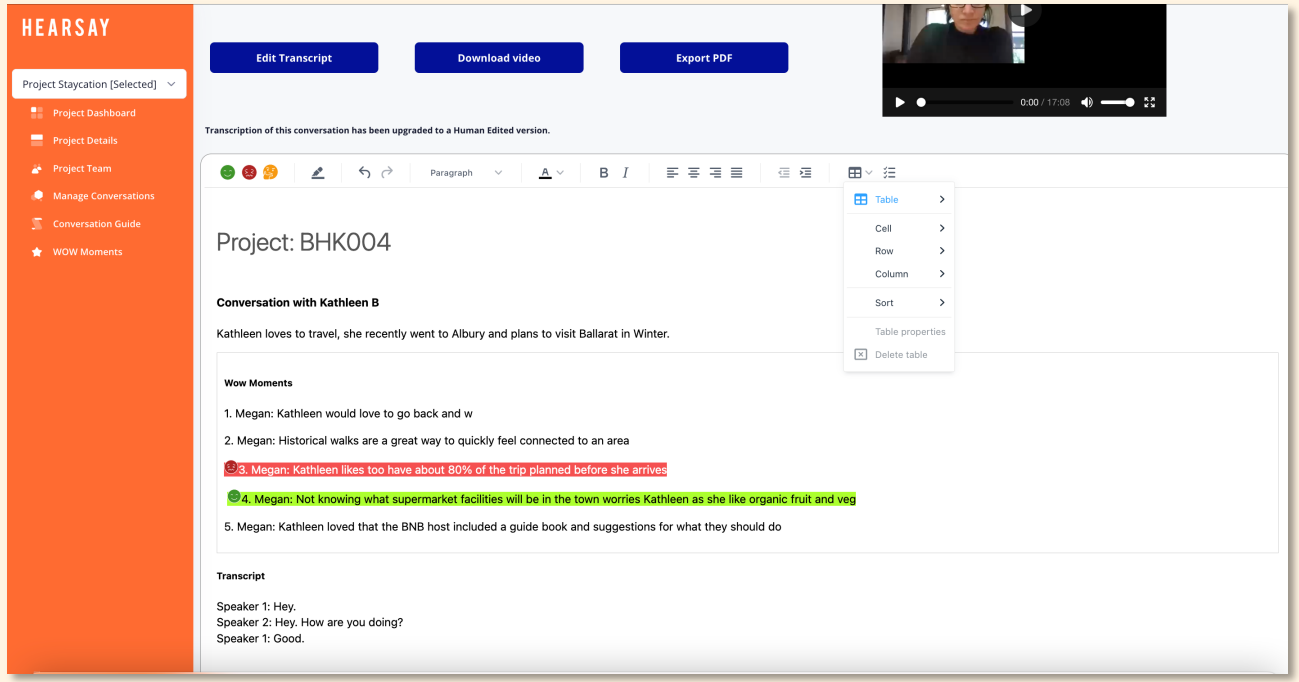
1. Edit the transcript
2. Download the video (first agreeing to Hearsay Terms of Use)
3. Export a pdf (Interview WOW moments, transcript, profile)



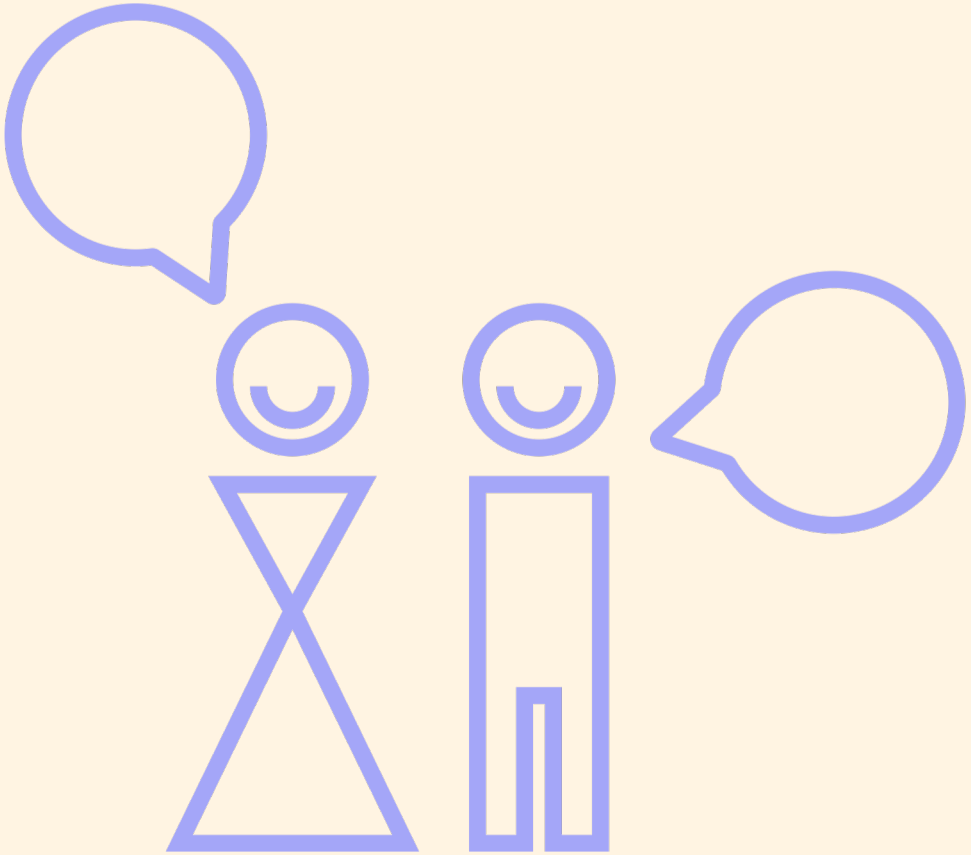
Tips when editing transcripts.

There is lots you can do now that you have an editable transcript. Below are some tips we suggest as a good start:

- Review your tagged moments – delete, keep, colour code highlight the reference text.
- Add some more tagged moment – simply highlight the text and selecta 'face'
- Add images, tables, notes
- Review the text and correct any spelling mistakes that AI has not interpreted correctly
- Some people like to play the video as they are reviewing



TROUBLE SHOOTING & HELP



HEARSAY

Common Queries and Solutions.

01: My video is not working. My camera is not on. The interviewee can't see me.

Try these steps first:

1. Check the video button is activated under the video screen
2. Even if the video button looks connected toggle it off and on
3. Use the small arrow next to the video button and select the camera

Second solution, try: Go to the settings in your browser and allow it to activate your camera. Either click on the browser name at the top of the screen, then preferences and find the security tab to enable Hearsay. Or some browsers have 3 dots, click them to get to settings, privacy and enable camera.

Third solution, try: It could be your interviewee with the problem, use the Hearsay Chat function under the video screen and give them the above instructions to troubleshoot the issue. Last resort, contact tech support via live chat.

02: My sound isn't working. I can't hear my interviewee and they can't hear me.

Try these steps first:

1. Check your volume is turned up – toggle the volume bar to activate
2. Check the mic button is activated under the video screen
3. Even if the mic button looks connected toggle it off and on
4. Use the small arrow next to the mic button and select the correct mic – check you are not connected to external headphones or another speaker.

Second solution, try: Go to the settings in your browser and allow it to activate your mic. Either click on the browser name at the top of the screen, then preferences and find the security tab to enable Hearsay. Or some browsers have 3 dots, click them to get to settings, privacy and enable the mic for the Hearsay Platform.

Third solution, try: It could be your interviewee with the problem, use the Hearsay Chat function under the video screen and give them the same instructions to troubleshoot the issue. Last resort, contact tech support via live chat.

Common Queries and Solutions.

03: My screen looks like it is frozen or the platform is not loading.

This sounds like a connection issue. Try these steps first:

1. Click the network button under the video screen to check quality. You may need to move closer to your router!
2. Refresh your screen up in the address bar.
3. Close your browser and re-join. Don't end the call but just leave and then re-join the call.

04: The entire screen is not visible on my computer.

This is usually a browser thing.

Go to the top of the screen, click on the View tab in your browser and click either actual size or zoom in so the entire screen can be seen.

05: I am in Chrome and I can't share my screen

1. Share screen in V 99 of the Chrome update has a bug which they are working on. There is a work around in the interim.
2. Update to latest Chrome version which is 99.
3. Close browser
4. Go to System Preferences > Security & Privacy, click the lock to make changes, and revoke permissions for screen sharing (PC)
5. Then grant permissions for sharing again
6. Go to System Preferences > Screen sharing, click the lock to make changes, and revoke permissions for screen sharing (MAC)
7. Then grant permissions for sharing again

Common Queries and Solutions.

06: When I share my screen I cannot see the other person or the Hearsay tools

The best experience for share screen is to use two screens.

- If you have access to two screens plug that in before your session or at the beginning of your session. On screen one you can have the Hearsay Platform and use the second one for the sharing document/website.

Alternative solutions, try:

1. Click back on the Hearsay Platform tab, sometimes your browser takes you to the sharing tab.
2. Manually reduce the size of the Hearsay screen and the sharing document so they both fit on your screen

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HEARSAY