eBook

Participant Recruiting 101

Introduction

You just finished building out your study and are SUPER PUMPED to start collecting user insights. You're envisioning diving into them like Scrooge McDuck does with his gold coin pool (which is tougher than it looks, trust me I speak from experience) and taking them to your manager and having them tell you, "Karen this is genius. What would we do without you?" and you would reply demurely, "We'll never know" and then you'll both laugh and go for lunch.

It's a foolproof plan, really. But wait - a nagging thought pulls you from your reverie. Where the heck are you supposed to find these people? A whisper suddenly floats on the breeze: "If you build it, they will come."

Except they won't because that's not how any of this works.

Ask the nearest researcher what one of their most persistent pain points in conducting user research and usability testing is and we can almost guarantee that recruiting participants is up there near the top. Or you can leave them alone because they're busy and we **already polled hundreds of UX practitioners at enterprise companies all over the world** and "sourcing the right participants" came in just underneath "getting executive buy-in" as one of the top four challenges UX teams are facing overall.

Digging down even deeper, we asked them what phase is the most challenging part of their UX team's research process, and coming in at number one with 47% of the votes was ***drumroll*** recruiting participants.

So this is obviously an issue, thank you for coming to my TedTalk.

OK, I'm being told by my boss I have to actually help solve the problem and that this isn't a TedTalk. FINE. Join us as we walk you through all the different elements that goes into recruiting the right participants, including how many you'll need, how much to compensate them, as well as different methods and tips to make recruiting far less nail-bitingly stressful.

What is participant recruiting?

I know, I know, but bear with me for the sake of commonly accepted outlining practices for informative ebooks.

Participant recruiting is the act of defining, finding and inviting representatives of your target audience into your user research/ usability study.

Okay that's out of the way now so you can stop rolling your eyes at me. Perhaps a better set of questions would be: "Why is this important" and "Why do so many people find this difficult?"

Starting with the former, and I'm taking for granted that if you're reading this **your organization has already bought into the importance of testing**, it's similar to the adage "garbage in, garbage out." This is the idea that incorrect input results in a faulty output. In this case, however, the input would be the insights and results from people that aren't the people your products and services are aimed at.

For example, if your product is aimed at selling houses you don't want input from people who are not looking at buying houses or are incapable of it. This can result in costly redesigns that would have been faster, easier and cheaper had more accurate insights been captured and used early on in the process.

"But any input at all is better than none!" There is absolutely some validity in that, but if I am in desperate tooth pain I would prefer a dentist over my mechanic even if his tools could technically do the job.

As to why so many find this to be so difficult, well, there's a multitude of reasons. Perhaps your product/service is niche and therefore the general population just can't offer very many of your target users. Perhaps stakeholders simply don't see the ROI of investing time, effort and money into recruiting when they heard from a guy who mentioned a webinar where a woman read a quote that 5 users will show you 85% of the most common usability issues. Perhaps you're a team of one and don't have the bandwidth or you're working in agile sprints and simply don't have the time to adequately spend finding the right people.

So yeah, there are many reasons; some of which we can help you mitigate or even overcome while others will simply be a hurdle to plan around. We know that recruiting can be tricky (which is why there is an entire industry built around it and likely why you downloaded this ebook) but it is not impossible.

You can do this and we're here to help.

Demystifying sample size: How many participants do I need?

I'm willing to bet you have heard someone say, "Jacob Nielsen says testing with **5 is enough**." You might have also heard, "Jared Spool says **8 is not enough**." Multivariate, A/B testing, Analytics, and Market Researchers say sample sizes of 1,000 or even 50,000 are not enough.

Let's take a minute here to find our center, go to a quiet, isolated space and yell, "AAAAAAAAAAAAGGGGGGGGGGGGGGGH!"

Good, much better. So what's the right answer and why?

The short answer is: below are our recommendations based on hundreds and hundreds of research engagements we see every year at UserZoom.

Sample size recommendations

The bolded and blue rows are the most common set of numbers we see here at UserZoom.

Identify Usability Issues

Occurrence Probability of Problem	Sample Size Needed
40%	4
30%	5
20%	**9**
10%	18
5%	37

Estimate Parameters KPI

Margin of Error (+/-)	Sample Size Needed 90% Confidence
24%	10
15%	28
10%	**65**
8%	103
5%	268
3%	749
2%	1,689

Comparing Options

Difference to Detect (90% Confidence)	Sample Size Within Subjects	Sample Size Between Subjects
50%	17	22
30%	29	64
12%	93	426
10%	**115**	614
5%	246	2,468
3%	421	6,866
1%	1,297	61,822

Wait, hold on a moment! Before scampering off to start recruiting let's take a moment to consider the 'Why' behind the 'How Many' song and dance.

Let's start by conducting a thought experiment. If I asked you, "Which tool should I use" and I showed you this picture what would your answer be?
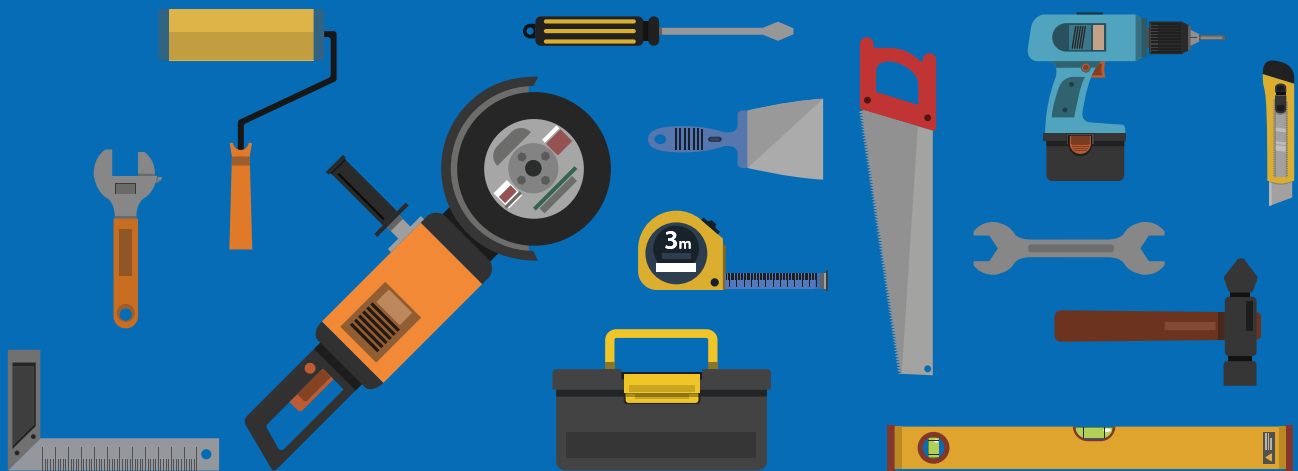
Well, without context, there is no right answer. I assume you would ask, "What do you need to do?" before answering the question. If I say "I need to punch this nail in the wall" you might reply "Ok, use the hammer" and then walk away muttering about the weirdo who doesn't know what a hammer is for.

It's the same for the "what sample size do I need" question, minus all the muttering. It all depends on the job you're trying to complete.

Let's look at three common UX tasks and delve into how many participants you should try to recruit and why. They are:

1. Looking for Usability Issues
2. Measuring Key Performance Indicators (KPIs)
3. Comparing two or more designs

1. Looking for Usability Issues

If you read Jacob Nielsen's article closely, what it is really saying is that a sample size of 5 is enough to identify 85% of the problems **that have a 31% or higher chance of occurring with at least one participant**. That's a little different than the usual take, isn't it?
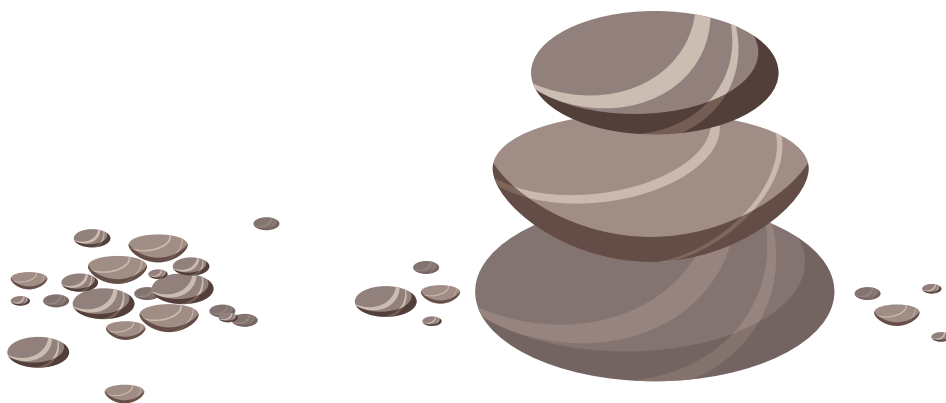
Small Rocks (Low probability of occurrence) vs Big Rocks (High probability of occurrence)

If your objective is to identify big glaring issues (a.k.a. big rocks) a sample size of 5 is enough. But if you want to go beyond that, and there are business values tied to fixing and optimizing several workflows at once, go with larger sample sizes.

Here's what I mean: A sample size of 5 is enough if you are looking for big rocks. A sample size of 20 **is not enough** if you are looking for big rocks **and** several smaller rocks. Simply put, the higher the sample size the more issues you will find, thus, the more usability issues you want/need to find the higher the sample size will need to be.

In many cases, especially where design has matured and lots of segment optimization is needed (I'm looking at you eCommerce and B2C websites), it is recommended to test with larger sample sizes of 20, 30 or even higher per segment.
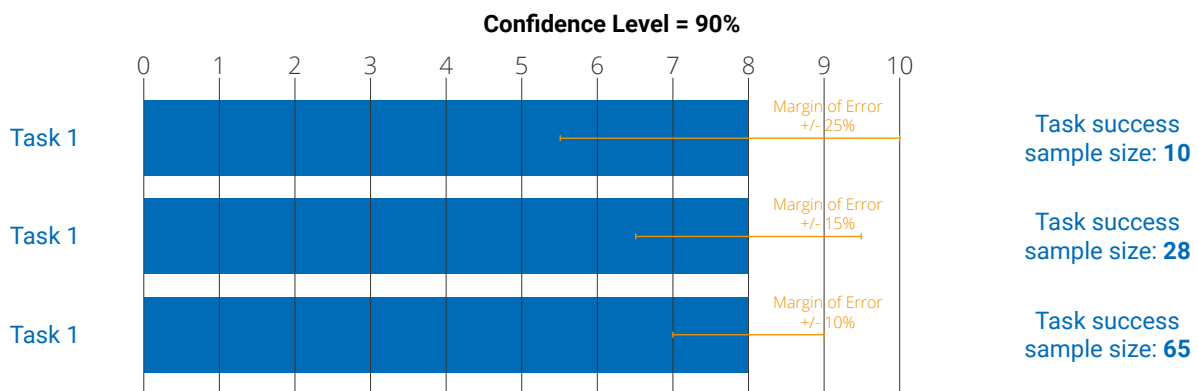
2. Key Performance Indicators (KPIs)

Real talk - some decisions can drastically affect a business. This means that the person making that decision wants to be confident that they are making the right decision by measuring KPIs and using data as their guide. Enter confidence levels and confidence intervals.

Confidence Level is the amount of uncertainty you can tolerate, while Confidence Interval or Margins is the amount of error that you can tolerate. Put simply - lower margins require larger sample sizes.

So the next time it feels like someone pulls a sample size suggestion out of a hat you can simply ask them, "What confidence level and confidence interval are you willing to accept with your KPIs" and then provide them with a more concrete answer. Plus they'll be, like, totally impressed with you.

For example: Anyone making a big decision about a major design choice would want to know that it wouldn't negatively affect the success rates of core tasks, yes? They want to be really, really sure - say, 90% Confidence Level and be able to measure things at +- 10% margins.

Confidence Level = 90%

	0	1	2	3	4	5	6	7	8	9	10

Task 1 — Margin of Error +/- 25% — Task success sample size: **10**

Task 1 — Margin of Error +/- 15% — Task success sample size: **28**

Task 1 — Margin of Error +/- 10% — Task success sample size: **65**

Higher the sample size the smaller the margin of error (at the same Confidence Level)

This means that they would have to have a higher sample size in order to feel confident that their decision won't tank the business.
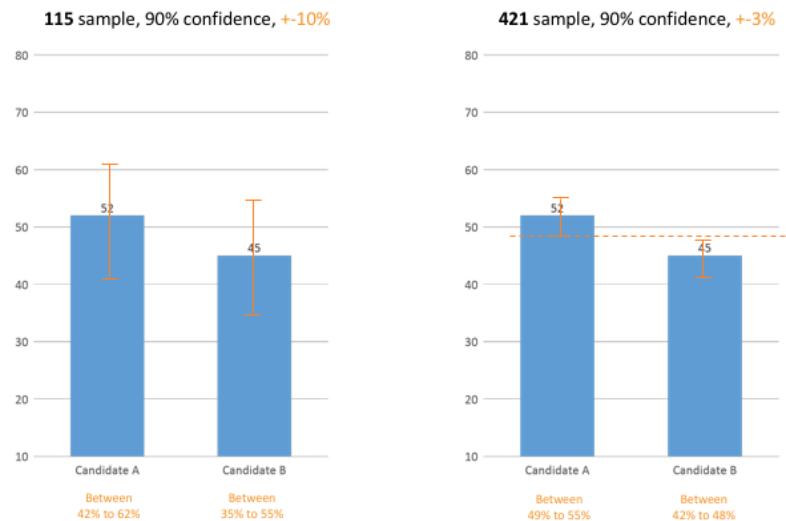
3. Comparing Design Options

Comparing two or more design options usually includes looking at behavioral metrics, such as Task Success Rates and Time on Task, as well as attitudinal metrics like Brand Preference, Ease of Use, NPS and other subjective ratings. The reason for this is that we are trying to detect a difference and claim that Design A or Design B wins because it performed better on a certain set of attributes.

The answer to "what's the right sample size" depends on the amount of difference you are trying to detect. The smaller the difference, the larger the sample size needed to determine the winner.

If the two options are very different for participants, apples to pineapples different, the chances of detecting significant difference is higher so a smaller sample size works. If the differences are not dramatically different, Pink Lady apples to Fuji apples, you will need a larger sample size.
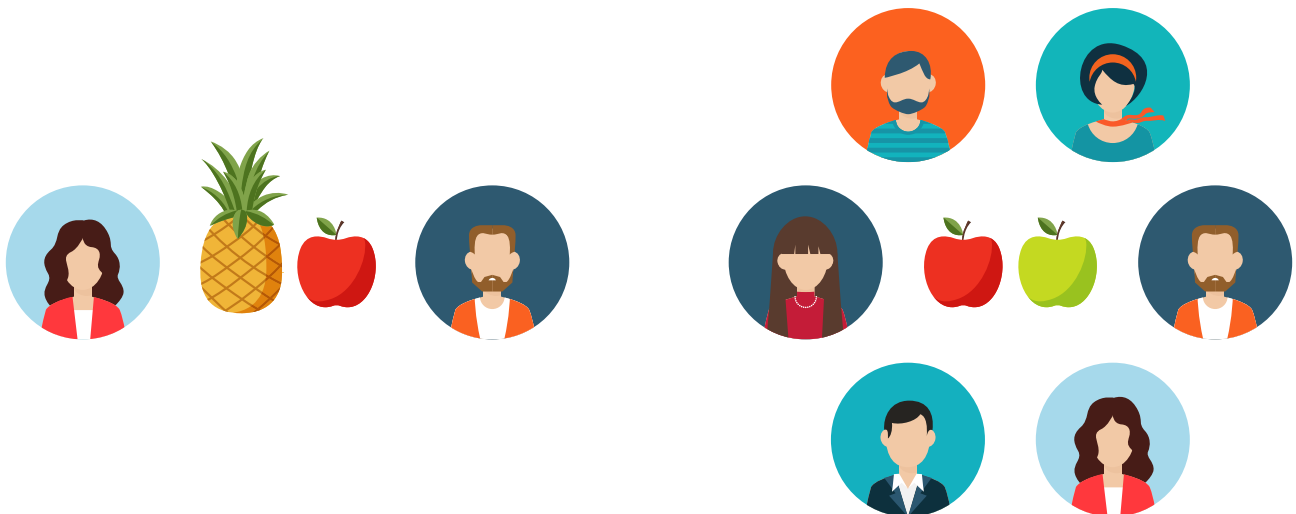
Let's use the image below as an example. A sample size of 115 can detect a 10% significant difference with 90% confidence. But if you want to detect a 3% difference, a sample size of 421 or higher would be needed to keep the confidence level at 90%.

Another thing to keep in mind when it comes to sample size for comparing designs depends on whether you're doing Within Subject or Between Subject experiments.

Within Subject means that each participant sees both design A and B, typically counterbalanced so some see A and then B while others see B and then A.

Between Subject means that one group of participants see Design A and another set of participants see Design B.

Long story short, Between Subject needs higher sample sizes in order to account for any group differences, while Within Subject typically needs a smaller sample size.

As an aside, most UX research we see use Within Subject experiments because it allows for a more apples to apples comparison of both A and B with an explicit question at the end (usually on user preference) and a comparison of both options. And again, there's the added benefit of smaller sample sizes.

Within Subject also helps with ideas that combine A and B into a new option C which has benefits of both A and B.

How much do I compensate my testers?

Once you've worked out how many people you'll want to include in your sample it's time to think about compensation.

As the wise Method Man once stated, "Cash rules everything around me." And while your family members might be willing to poke around on your prototype for free, you'll find that you will typically want to set aside budget for compensating your testers.

But how much? That's the million dollar question (don't panic, it's probably not a million dollars).

Let's start with the easiest: if you're using a sourcing vendor (more on that later) they will deliver it as a line item. Bada-bing bada-boom. Just send it to the holder of the holy business checkbook and you can be on your merry researching way while they handle it. Be aware, however, that because you're engaging with a service it will be more expensive than if you did it on your own but it will likely be far easier.

If you aren't using an external sourcing partner, however, there's a few things you should consider when it comes to compensating your participants.

1. Are your users **hard to find** (low incidence rates in the general population)
2. Are you asking them to **travel** to your usability lab or workplace
3. How much of their **time** or you asking for
4. How **complex** is your study
5. How **invested** are they in having an impact on your product or service

Typically speaking the rarer the participant is in the general population, the longer and more complex the study, and the more time you're asking of them (including driving to and from your usability lab) all add up to a more expensive compensation. We've seen anywhere from $25-$60 an hour, and that's not even for super hard to find participants.

As for what the number should be, well, that all depends on a mixture of your budget and how the target demographic fits into the above points, my friends.

For example, if a user is a huge fan of what it is you do (point #5 from above) and

you impart upon them that they would have a direct impact on the thing they love, they may be willing to help you for free or at a discounted rate. If you wanted to you could even throw in a gift card or a promo code discount to sweeten the deal.

If you're asking someone to come into your usability lab or workplace they should be compensated more than if someone is allowed to take your study remotely. If your study is complex they should be compensated more than if they did a quick survey.

As much as I would love to share another chart with you there are simply too many variables, so experiment a little and if you aren't getting much traction try upping the amount.
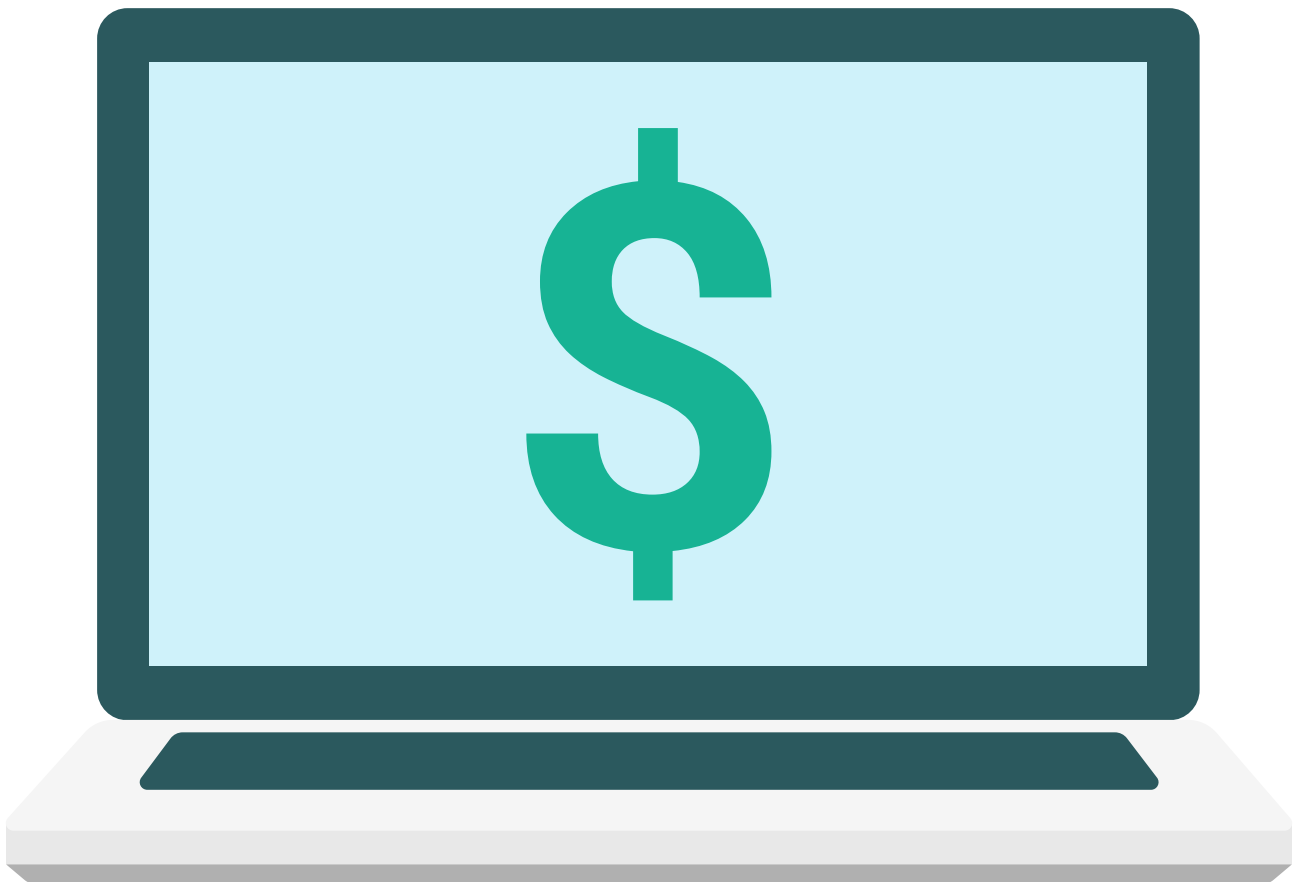
*Why screeners
are your friend*

Before we dive into the different methods of recruiting I want to quickly bring up an important aspect of safeguarding the quality of your participants, and therefore your data – screeners.

A screener (or screener questionnaire) is an opportunity for you to have a bit more control over who carries out your test by helping you filter out anybody who wouldn't necessarily be right for it. Think of them as a bouncer for your study.

For instance, if you're testing the navigation of a website that has a sole audience of civil engineers, and you want to make sure all the relevant categories are represented and sit in the right menu, there's little point in recruiting a load of people who literally just this second had to Google the term 'civil engineers.' Therefore a screener question could be written to find out what level of knowledge a participant has around civil engineering terms and be used to screen accordingly.

If you're an existing UserZoom customer we can help you with this task. You can define exactly who you want to test with for any and all research methods by creating your own screener questions. This helps ensure you're gaining insights from only the most valuable and relevant participants.

If that sounds like too much work, screeners can be saved and copied across multiple studies, or you can use pre-approved Screeners from UserZoom's Screener library.

Here are a few pointers on how to successfully use your screeners:

Identify Your Ideal Screening Criteria

Start off by first identifying your target audience, and then writing the right questions to ensure these are the people who make it into your study (this would be the civil engineers example from above).

Put Must-Have Questions Up First

If civil engineers are what you want then your first question should be the one that screens out non civil engineers. Don't ask the non-essential questions first and take up their time if they'll be screened out at the end anyways. That's why we recommend that you start with the criteria that are must-haves, followed by the nice-to-haves. Also keep in mind that if you want to gather demographic information from your participants you can ask a non-essential demographic question in the study itself.

Leave Wiggle Room

Being too restrictive can needlessly shrink the pool of qualified participants and increase the time it takes to fill your study. Think of it this way: if you wanted to find a good study partner you would have a much easier time finding someone who is an A student than an A+ student and wouldn't suffer from a lack of knowledge.

Keep It Short

Your screening questions should only be used for screening purposes or quota management. **Screener questions should NOT be used for data collection**. That's what your study is for, silly. With this in mind, try to limit screeners to 10 questions for quantitative studies and 12 questions for qualitative studies.

Keep It Simple

This is inline with the above point. Can you write in an epic five part question with logic and conditions and do a deep dive that Jacques Cousteau would be proud of? Yes. Should you? An emphatic no. Keep in mind that brevity, both in terms of how your questions are worded as well as the number of questions, is your friend.

For more information on screeners, such as tips for writing them, we recommend **checking out our blog articles!**

Different recruiting methods

We've arrived on the different methods and ways in which you can recruit participants. Exciting! You're doing great, truly proud of you for sticking with this when you saw you had an out where you could just pay someone else to do it.

Technically, there are an almost infinite amount of ways you could attempt to recruit participants. But instead of putting a QR code on confetti and unleashing it at a stadium or renting a plane to fly along the beach with the URL to your study floating behind it on an overlarge sign, how about we take a look at the most common and effective methods for participant recruiting.

(Editor's note: If you do either of the aforementioned please send us pics because that's hilarious. Thanks.)
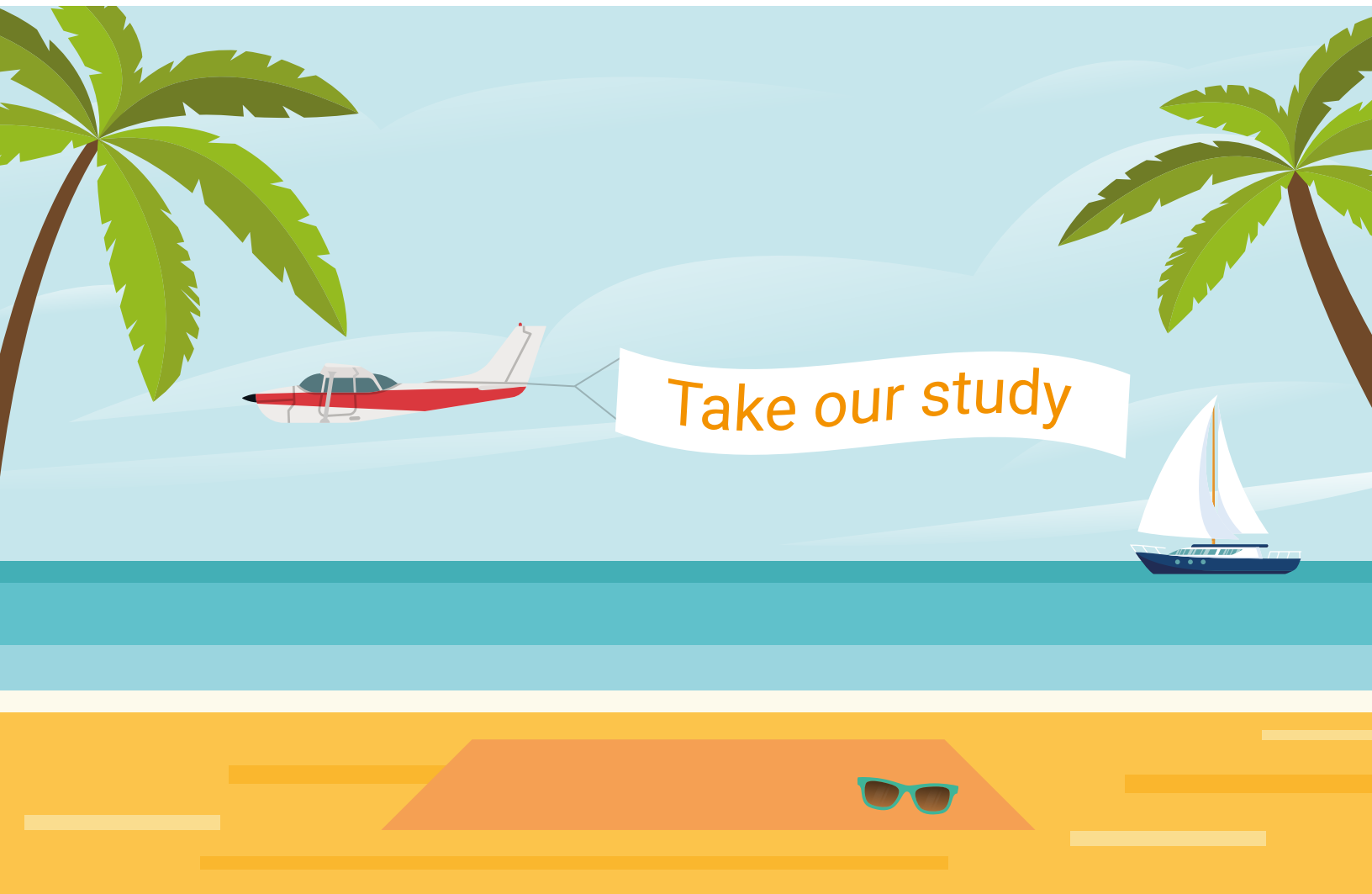
Guerilla Testing

Let me tell you a quick story that actually happened to me. One time I was at a sandwich shop for lunch here in the Silicon Valley, hanging out and reading my Kindle, when a gentlemen came in and ordered a sandwich. While he waited, he noticed what I was reading on and he said to me, "Sorry to bother you, but is that a Kindle? Do you like it? Do you use it often?"

I replied that it was and I do, and he asked me about half a dozen more casual but product-centric questions while they made his sandwich. Not your typical consumer to consumer type questions. On the way he out he said, "One more quick question - based on how often you're reading how's the battery life?" On a hunch I asked, "Do you work on the Kindle team?" and he gave me a sly grin before leaving.

That, ladies and gentlemen, was ad-hoc guerilla research.

Guerilla testing, or guerilla research, is basically reaching out to readily available people around you. Sometimes referred to as "down and dirty" testing in that it's typically cheap, fast, and in my case, fairly casual. It is also sometimes referred to as the "coffee shop method" as it isn't uncommon to simply step into a coffee shop and offer to buy people a coffee if they give you some quick feedback.

Sometimes you may want to test with participants that are right under your nose, such as coworkers and/or friends and family. If you decide to conduct internal testing with coworkers make sure that they have had no involvement in the design or development of the site or product you are testing, and most importantly, that they represent a target audience. The same with your family - if your mom recognizes this is the thing you've been talking about at family BBQ's she will most likely have a biased opinion, but your cousin Reggie who never shows up to family gatherings might be okay.

Is this method extremely targeted? No (unless you're working on a coffee related product or your family are customers). But it is feedback and it is cheap and relatively easy to gather.

Pros:

- ◆ Cheap from an overhead and compensation perspective
- ◆ Easy to pick a place and walk in with a laptop
- ◆ Surplus of coffee shops with wi-fi
- ◆ You know where your coworkers sit
- ◆ Gives you a chance to catch up with Reggie

Cons:

- ◆ Most likely not testing with your target audience
- ◆ Not necessarily a "natural" setting so may not be capturing natural user behavior
- ◆ Very difficult to do at scale
- ◆ Friends, family and coworkers can carry a bias
- ◆ Tests the patience of coffee shop staff?

Overall, remember that guerilla testing is an option available to you when your organization is UX immature or you just need some quick feedback pronto, but shouldn't be considered the go-to method when your organization is serious about being data driven.

So how can you be more serious about recruiting? The good news is you have options, as you're about to see.

In-House Recruiting

In-house recruiting is when you control most, if not all, of the recruiting process internally at your organization.

This is for you hardy DIY'ers reading this who see something on Etsy and say, "These unicorn mason jars are adorable and perfect for my child's upcoming birthday party" followed immediately by, "I can make that myself." You have my respect because I would totally overpay for those unicorn mason jars simply to avoid any and all contact with glitter, or as I like to call it, the Devil's Dust.

There are several ways that you can conduct your recruiting in-house, and we'll cover the three most common that we see here at UserZoom:

1. Emailing your database

2. Intercepts

3. Social Media

1. Emailing Your Database

The obvious requirement here is that your organization has a database of users that you can contact (and if you don't, remember that it's never too late to start thinking about creating one).

Email lists allow researchers to recruit potential participants from your company's opt-in contact list. This is great because you know they are targeted users who, depending on their level of engagement, are most likely invested in your product and would be willing to help optimize something they are already using. However, it is advised to proceed with caution because sometimes response quality can be a tad questionable when you're blasting out emails to relative strangers (remember - screeners are your friends).

Here's a quick tip: be sure to personalize your emails. Think about it - how do you feel when you see an email that's an obvious copy and paste job? Though this may be seen as an arduous task, doing so can increase your response rate by at least 5% or sometimes higher.

Pros:

- Your own users are the very definition of "target audience"
- Writing an email and personalizing it is still faster and easier than finding participants from scratch
- Can help build rapport with users by showing them their opinion matters
- Depending on the size of your database, this can be done at scale

Cons:

- Have to have a database of customers that have opted in to being contacted
- Depending on the size of your database, this can be extremely hard to do at scale
- Run the risk over over-engaging with your users, which can lead to lower levels of involvement as well as lower quality responses
- Without security measures in place (a.k.a. screeners) you don't really know who you're getting feedback from

2. Site Intercepts

Sometimes known on the street by their more nefarious name - "pop-ups" - site intercepts are study invites that are coded into your site in order to automatically ask live users if they are willing to join. If you have a good amount of traffic on your website or mobile site, you can recruit participants and explore their experiences, understanding, and level of satisfaction while catching them in the act of things.

The main trick is to try to place the intercept in the place that makes the most sense to recruit.

If you want to improve your search or search results, for example, have the invite on the search results page. "Tell us what you think about this page and get a gift card" or "Got 5 minutes? Answer 3 quick questions and get a 25% off promo code." Also consider a banner in the place you want to recruit and don't be afraid to appeal to their vanity. "We're re-doing this page and need expert opinions – click here to be part of the redesign."

Here's another tip: always try to make your intercepts branded. Visitors are more likely to say yes when it looks like it's supposed to be a part of your site, instead of something that makes them want to run their anti-virus.

Pros:

- ◆ Passive recruiting in the sense that you can set the incidence rate (10% of all people who land on the page, e.g.) and let it run in the background
- ◆ High likelihood that it will be someone you want to hear from - either a user or a potential user
- ◆ Depending on your traffic this can be a fast way to get insights
- ◆ Can use intercepts as a way to recruit people into your opt-in email list for future studies

Cons:

- ◆ Without the use of screeners it's hard to know who is coming into your studies

- ◆ If you don't have a high volume of site traffic it can be unreliable and hard to scale

- ◆ When overused it can potentially cause people to avoid your site or have a negative perception of your site as one loaded with "pop-ups," particularly if your intercepts aren't branded

3. Social Media

#researcherlife #usability #tidepodchallenge #crossfit. You know, social media! Look, when your grandparents are sharing political memes on Facebook it's safe to say that social media has a broad reach (also, yikes meema and papa) and when you want to recruit participants it pays to be where participants are.

You can recruit participants through popular social media sites such as Facebook, Twitter, Instagram, and LinkedIn, just to name a few. With Facebook and LinkedIn you can recruit through paid advertisements (ads), fan pages, personal messages, and post in groups. You can also specifically use LinkedIn groups to advertise to potential study participants who are in your target audience. Need dentists? Search LinkedIn groups for dentists and you may just find who you're looking for.

Pro tip: It helps to know when people are most active on certain kinds of social media. If you post too early or too late it will most likely get buried and go unseen. Facebook, Twitter and Instagram tend to be used more before work, after work, and around lunch hours whereas sites like LinkedIn are mostly checked during work hours. Also, know your crowd and search for relevant hashtags to help you find them.

Pros:

- Can be relatively fast and simple to create
- Can reach a wide swath of the population both domestically and internationally
- There are myriad social media platforms to choose from, ranging from the broad to the niche

Cons:

- Requires some working knowledge of each social media platform, as well as the types of users and when they are engaging with it
- Hard to control who sees it and therefore might require time and effort ensuring the quality of your data
- Hard to vet people are who they say they are
- It's possible for your competition to see and participate in your studies

External Recruiting

We mentioned previously that recruiting can be hard. If someone said, "Prove it" I'd say "Okay, geez" and then do a Google search for recruitment help and point to the entire industry that exists to specifically help with it. External recruiting is when you reach out to one of these third party vendors to recruit participants for you.

To use our unicorn mason jar metaphor from before – it doesn't mean that you can't make them, it just means you might not be willing or able to make the unicorn mason jars and the unicorn cake all at the same time and that one mom who always has Pinterest perfect decorations everyone won't shut up about is going to be there so you are willing to pay for help.

That's the beauty of allowing others to recruit for you - it frees up your bandwidth to do other important things, such as analyzing insights, creating reports and presenting them to the team or preparing for the next sprint. Keep in mind, though, that you will be paying for that breathing room.

We'll cover two different aspects of sourcing vendors - general and specialized panel vendors.

General Panel Vendors

The good news is that this industry has quite a lot of players in it, which means there is a very good chance that you can find the people you're looking for. For example, I'm willing to bet at least one of these companies rings a bell: Research Now SSI (now dynata), Op4G, criticalmix, Fulcrum, etc.

If not, well, there you go! Feel free to reach out and get a quote.

One thing to keep in mind is that some panel vendors focus on a specific market or on a specific geographic location. For example, there are vendors who focus on mobile users while others focus on users who are located in Canada. More on that below.

Once you find a panel vendor the usual process is they will ask you to provide a demographic screener for the type(s) of participants you're looking for. They'll run that through their database to see how many fit the description and provide you with an estimated CPP (cost per participant) which will then be used to supply a quote based on the N, or sample size, you're looking to get feedback from.

Keep in mind that this cost also covers all the work that the panel provider will be doing. They will be doing the inviting, they will be the ones handling compensating the participants, they will be the one who do all the manual work and interact with participants through emails. If you have the budget for it this can be a lifesaver.

But what if you're looking for something very specific, and not just a little specific? That's where specialized panels come in.

Specialized Panel Vendors

What do we mean by specialized? Let's use **accessibility testing** as an example.

If you want to test your site with participants that have visual or motor impairments, you might find that other panels would have a very hard time providing them. Instead of saying it would be too difficult or costly to take into consideration (and it's our belief that the internet should be accessible to all) take some time to research on whether or not there is a panel out there that focuses on it.

The good news is that, for this example, there are panel providers like Knowbility. Knowbility Inc. maintains the AccessWorks panel, which includes people who are blind or have low vision, physical/motor impairments, hearing impairments, and/or cognitive impairments.

Other examples of specialized panel providers would be Reckner, who focus on doctors, nurses, and other healthcare professionals, as well as Schlesinger Group, who focus on getting hard to reach audiences for qualitative testing.

The main takeaway here is that if you do find yourself wanting or needing to run a test with a very specific, harder than usual demographic do a little digging to see if a panel exists that caters to this specific need.

A Note on International Recruiting

As companies expand into international markets they are realizing that thinking globally and acting locally means ensuring that their product is optimized for all customers or users, wherever they may be. Unfortunately, sometimes businesses accidentally offend users from a different culture, which can harm their brand and is generally bad for business.

This is why international testing is extremely important; it helps companies build confidence that their products will be adopted and enjoyed by users from various geographies or cultures. The hurdle here is (yep, you guessed it since it's in this ebook) recruiting.

This is a common research challenge regardless of where your users live, but when you need users from specific countries and cultures your participant pool becomes significantly smaller. Recruiting participants from specific regions, countries, or even states/provinces/cities can be challenging and expensive. And even more so as you as you filter the populace for specific demographics and profiles.

However, there are several ways to recruit the right participants for your international studies:

◆ Having a relationship with a panel vendor that focuses on international testing can be a huge boon when it comes to recruiting users. You should always ask about their testing pool and whether they have historically had success providing participants from a country or culture.

◆ If you already have a localized site or app you should consider opt-in recruitment methods such as invitation layers or feedback tabs that invite organic users to participate in your testing.

◆ Consider recruiting from your own customer database – people who are already users of your product or service within the countries you want to perform your research.

◆ Recruiting on your own through social media or other online outlets where your target users are likely to be found. This can be especially useful for hard-to-find profiles (for example, Rocket Scientists in Norway) and when you only need a small number of users.

We have a very useful tip we always impart to customers who are conducting international recruiting and testing and it would be remiss of me to not include it here for you, dear reader.

Language is a beautiful, fickle thing filled with subtleties that are easy to miss if you're not a native speaker. There are tons of examples of company slogans having unintended (and sometimes hilarious, sometimes horrifying) translations when taken abroad. Obviously, testing slogans with native speakers is important to make sure the intended message gets across but this also underlies another important aspect of international recruiting and testing. Getting the right message across in a different language can be tricky.

This is why we would always recommend using a native speaker or professional translation service for your demographics, screener questions and test scripts. If you are doing research in a particular country there may be native speakers within your own company that you can reach out to for help, so ask around!

10 Expert Tips for Recruiting

Now you're all ready to give this recruiting thing a go after reading this amazingly informative ebook. Good job! We're rooting for you and know you can do it.

As a final parting gift, I asked UserZoom's Professional Services team for their top recruiting tips. Here they are presented in no particular order.

1. Over recruit

Let it be known that if you need 10 qualitative think-out-louds and recruit 10 people in advance that at least one of them will need to take their dog to the vet because it found the leftover candy from Halloween.

Don't worry the hypothetical dog is fine. Your tidy plan to get 10 results within the time constraints of your sprint? Not so much.

That's why we recommend to always have a few more in waiting should the need arise. This is particularly true if you are conducting moderated testing, either in person or remote. Life happens, so be prepared for it.

2. Always use a screener

Seriously you guys use screeners. Trust us on this one. Also don't buy sushi from gas stations. Trust us on that one, too.

Even if you're doing live intercepts from a page on your website that is literally a fan club, use a screener. It will help safeguard your data and ensure that all the work you or the panel provider has done isn't wasted by having to go back and vet participants, re-recruit (see above) and parse through your data. Use the screener.

3. Account for recruiting time in your planning

I'm willing to bet at some point in your career you bore witness to a research planning session in which recruiting was vastly underrated in terms of how long it would take. And by all means – if you reliably get the amount of participants you need for every sprint and test, please, feel free to be smug in your achievement.

But for the rest of us, be sure to take into consideration typical recruitment concerns when planning your research and how that will affect the amount of time it takes to find and invite participants into your study.

We recommend starting by asking questions such as:

Are they rare? Do you have some on file? Are you trying to get live users from your site? Historically did it take a lot of effort? Is this an entirely new segment? Are you doing this in-house or are you using a panel vendor?

4. Take compensation into account

You have to show respect for people's time. Full stop. Typically this means the longer the study, the more in depth it is, and the more technical the task means that a higher compensation will most likely be needed. If you're not getting the number of completes you need in the expected time you've allotted, take a fresh look at what you're asking and what you're offering in return.

However, be aware that not everyone is motivated by money. If you found that highly sought after left-handed doctor do you think she would be motivated by a $20 gift card for her valuable time? Could there be another way to get her interested? Maybe she doesn't want the gift card but would be delighted if it were donated to a charity of her choice in her name.

Get creative and experiment if need be.

5. Know your persona(s)...

Like I said before, if my tooth hurts I would prefer a dentist even if my mechanic's tools could handle it. You might be doing yourself a disservice, and at worst sabotaging your own study and business, by collecting and acting upon insights from the wrong crowd.

There was an example I heard once about a company that went under because their website, which catered to pregnant mothers, (you guessed it) didn't test with women who were, had been or planned to become pregnant.

Figure out the KPI or business objective you're testing for, analyze which segment is the best to get the relevant feedback from, and then recruit them to the best of your ability.

6. ...But stop holding your breath for unicorns

This is in relation to the above point. Know your target audience but don't don blinders while searching for someone who hits every single qualification. Be aware that you can bias your own results by focusing too much on "the one." People won't always be perfect matches and that's okay. Besides, screening out people who fit 85% of your criteria just creates a longer time to field your study.

All we're saying is that if you run a website for doctors, you don't need to recruit a doctor to see if someone can find the password reset button on the homepage. You could, but it's harder and more expensive, so why bother when a more general participant would suffice?

7. Is there technical knowledge that's needed

Sometimes it's taken for granted that participants would need to have some kind of technical knowledge or expertise. If you're testing a remote prototype, for example, you may want to consider explaining what all they would need in order to access and interact with it. If there's a piece of hardware or physical equipment

this doubly applies.

However, check your bias on the kinds of technical expertise you're assuming someone has or doesn't have. My grandma's meme-filled text messages are on point, while my dad has to ask for help finding emojis. If technical experience is important, add it to the screener and be sure to include directions if needed.

8. Don't just focus on one recruitment method, combine when possible

Can't see the forest for the trees. Don't put all your eggs in one basket. Shouldn't do back to back metaphors for the same thing in an ebook. We've heard all of these classic adages before.

Our point is that if you can combine different recruiting methods, do so. Don't focus all of your efforts into social media recruiting if it's not working for you as fast as it should. Try and get a few different channels going simultaneously and make use of all the tools available to you.

9. Try to establish rapport to build up your own user panel

I'm sure everyone can see the benefits of having a known group of users you can reach out to. You know they are the right people, they give the feedback you're after and it alleviates some of the stress of recruitment knowing you have that pool to draw from. We've seen this done a few different ways.

Site intercepts on specific pages are popular because if someone has navigated to a specific page where users, instead of visitors, would visit (say, a login page or a FAQ page rather than the homepage) there's a certain degree of likelihood that they aren't simply just browsing the site.

Regardless of how you find them, once invited into a study there can be a question at the end about whether they would be willing to occasionally provide feedback. Some advice I once heard was to treat testers like you're on a first date. Be polite,

ask them questions about themselves, and if you want to see them again let them know and if they don't that's perfectly fine.

10. Drop the jargon

Needed: Journeymen design factotum from an upper-middle-lower sized series J macro foundation of middling years.

Yeah, I don't get it either and I wrote it. Watch the jargon in your communications, both with panel vendors and with your testers themselves. If you want a middle manager from a small company then just say so. Keep things simple and speak in layman terms. Trust me, everyone will thank you.

Conclusion

There's no denying that recruiting can be tough. The good news is that you're not alone in this feeling, and where there's a business pain point there's a company trying to alleviate it. Even better news is that you have many recruiting methods at your disposal, both in-house and externally, that you can implement to make this task easier.

From all of us here at UserZoom, thank you for downloading this ebook. We sincerely hope that you feel empowered to overcome the challenges recruitment will throw at you.

looks around to see if the boss is still watching Thanks for coming to my TedTalk.

Why recruit with UserZoom?

We know that finding the right users for your research matters and can also be quite challenging. UserZoom has responded to this challenge by developing Intelligent Sourcing. With access to over 120 million participants, we make recruiting for qualitative and quantitative UX research easy.

By developing sourcing that's fully integrated within UserZoom, the UX insights platform, we're automating every step of the UX testing process, making it faster and more efficient for organizations to get the rich insights they need from the participants that matter. With UserZoom you get the flexibility needed to get the most relevant feedback to inform your business-critical UX decisions.

UserZoom
Intelligent
Sourcing for
UX Research

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Want to know more about UserZoom's Intelligent Sourcing?
You can download our panel book to learn more!

Recruit Our Users

Integrated with the world's leading participant providers, UserZoom gives you access to the most relevant representative users for your specific research objective, with even the most specific screening criteria.

And with automated recruiting available for all unmoderated testing methods, UserZoom cuts the time and effort it takes to find the users you need, allowing you to scale your UX research and focus on analyzing, sharing and executing upon your insights.

IntelliZoom Panel

UserZoom's world-leading proprietary panel, IntelliZoom Panel sources a diverse range of participants verified for Think-Out-Loud feedback and Card Sorts across territories in North America and Europe. With a rigorous onboarding and profiling process, IntelliZoom Panel is ideally placed to source participants for all UX research methods.

API Global Panel Network

Our intelligent sourcing engine connects to our global panel network for instantaneous sourcing of participants from a pool of over 120 million users for all study types and targeting criteria. All partners are ESOMAR members, are vetted through a screening process and regularly evaluated for speed and quality. We carefully monitor the speed at which quotas fill within the sourcing engine, with 85% of studies reaching quota in under 24 hours.

Third-Party Partners

We use the industry standard practice of working with third-parties when more respondents are needed to fill quotas on studies with unique or difficult targeting requirements. Even though these local and global partners are not part of our API Global Panel Network, they are put through a stringent screening process and their performance is evaluated to ensure panel health and data quality.

Recruit Your Own Users

Get feedback directly from your customers, free of charge! With your platform subscription you can send any study to anyone at any time, through just about every channel.

Generate as many unique URLs as you want and invite your customers, employees, prospects via email, social, QR code and more.
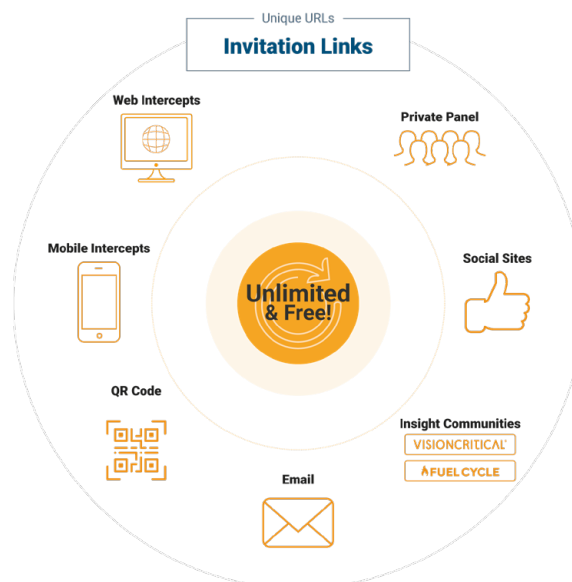
Live Intercepts

Intercept organic visitors to your website, mobile site and apps and invite them into a study through live intercepts.

Email

If you have access to someone's email it's as simple as copying and pasting the URL link to your study and hitting send.

Social Channels

Simply paste the URL link to your study on your social media channels and you can be engaging with the folks who like, follow and subscribe to you.

Private Panels

If you have cultivated your own personal panel feel free to send them the links to your study as frequently as you would like.

QR Code

Each of your studies comes with a unique QR code which can be used to invite people into your studies. If you can put a QR code on it, you can use it to recruit participants.

Vision Critical Insight Communities

Launch UserZoom studies to your existing Vision Critical insight communities through our fully-supported integration

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