Recruiting the Right Participants: Methods and Challenges

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TECED user experience
research and design

Who we are

- Stephanie's background and experience
  - CEO of UX consultancy TecEd
  - Missionary for rigorous participant selection
  - Seminal papers in 1987, 1988
  - Since then, responsible for hundreds of user research projects involving participant selection
- Audience background and experience?

Why is participant selection important?

Why is participant recruiting difficult?

- Deciding who they are (criteria)
- Finding where they are (recruiting)
- Making it happen (screening and scheduling)

Challenges of participant criteria

- What's the right level of granularity?
- Mandatory vs. optional characteristics
- May need to revisit priorities of characteristics during recruiting

Challenges of finding candidates

- Customer lists can help

- Consumer or end-user participants usually easier to recruit than B2B

- For consumer recruiting, you can cast a wide net and then narrow down

- For B2B or specialized vertical audiences, you need to go where they are

End-user recruiting invitations

Thinking About Options for Your Life and Career?

Get a Head Start by Participating in Our Research Study!

We're looking f...

Helping Your Kids Think About Options for Life and Career?

Get a Head Start by Participating in Our Research Study!

We're looking for people who have high school- or college-age children for a 1-hour usability session. Perform tasks with a website, give us your opinions, and earn $100. Sessions conducted in Ann Arbor January 28 – February 1. To apply, visit https://www.surveymonkey.com/s/WRF39TQ

No sales, your privacy respected.

Research Study https://www.surveymonkey.com/s/WRF39TQ

Gamers Needed for Usability Research

We're looking for people who play online/video games for 2-hour research sessions for a major technology company. Use a new gaming product, give us your opinions, and earn $150. Sessions conducted in Santa Clara March 4 to 8. To apply, please visit www.teced.com/study.htm and complete the eligibility questionnaire.

User Research Study on Mobile Devices

We're looking for people for 1.25-hour research sessions for a major technology company. Perform tasks with a mobile device, give us your opinions, and earn $100. Sessions conducted in San Francisco December 3 to 14. To apply, please visit www.teced.com/study.htm and complete the eligibility questionnaire.

Have you ever needed legal information or assistance?

You can help with a research study if you have recently looked for legal information or a lawyer. Take part in a 2-hour focus group on May 3 in Ann Arbor, and earn $150. To apply, please visit www.teced.com/study and complete the eligibility questionnaire.

Do you do academic research for school or work?

Looking for college students and faculty members who use online databases for a 1-hour research session. Perform tasks with an online resource, give us your opinions, and earn a $100 Visa gift card. Sessions conducted in Ann Arbor on December 17-19. To apply, please visit www.teced.com/study.htm and complete the eligibility questionnaire.

Finding the people you seek: questionnaire design

- Two reasons for screening questionnaires:

  1. All candidates are (more or less) qualified and you want to pick the best set.

  2. You need to strain out qualified candidates from a large pool of (mostly unqualified) candidates.

Sample screening questions

Which of the following apps do you use on your smartphone? Check all that apply.
[ ] Amazon Mobile
[ ] eBay
[ ] Bitcoin Wallet
[ ] Starbucks
[ ] Square Wallet
[ ] Bank of America Mobile Banking
[ ] Target
[ ] Walmart
[ ] The Coupon App
[ ] Groupon
[ ] Wells Fargo Mobile
[ ] LivingSocial
[ ] Droid Wallet
[ ] PayPal Mobile

When was the last time you used a lawyer?
( ) Within the last 3 months
( ) 3 to 6 months ago
( ) 6 to 9 months ago
( ) 9 to 12 months ago
( ) More than 12 months ago
( ) Have never used a lawyer

Which of the following online resources do you use? Check all that apply.
[ ] Cambridge Books Online
[ ] EBL
[ ] ebrary
[ ] Ebsco
[ ] HathiTrust
[ ] JSTOR
[ ] MyiLibrary (Ingram)
[ ] Netlibrary
[ ] Oxford Scholarship Online
[ ] Project Muse
[ ] SpringerLink books
[ ] Taylor & Francis books
[ ] Other (please specify): _
[ ] Do not use these online resources

What motivates people to participate?

- Money
- Product
- Information
- Doing good/charity
- Future benefits

Case histories

- B2B ethnography in large enterprises
- Usability test of mobile devices with teenagers

Case history 1: B2B ethnography

- Project background
- Enterprises
- Participants
- Recruiting methodology
- Lessons learned

Project background

- Client wanted to understand how videoconferencing is used in large corporations.

- TecEd conducted field research at four enterprises

- Participants were managers, knowledge workers, technical staff

Enterprises the client wanted

- Large, diverse multinational corporations
- Enterprises using specific videoconferencing equipment
- Mix of industries

Participants the client wanted

- Frequent videoconferencing use
- International videoconferencing preferred
- Mix of job roles

Recruiting methodology and process

- **For research at enterprises, contacts trump everything:**
  - Colleagues who are UX directors
  - Personal friends in corporate CIO offices
- **Process:**
  - Start with personal emails to contacts
  - Iterate as necessary to gain approvals to visit
  - Work with internal coordinator delegated by approver to identify candidates
  - Invite candidates, coaxing them to answer a background questionnaire

Email to UX colleagues

Subject: Help TecEd with Ethnographic Research?

I'm writing because TecEd has just begun a large ethnographic research project, and I'd like to ask *Enterprise*'s help with it. Our client *Client* wants to learn how people in U.S. enterprises use video conferencing, so they can design telepresence products that better meet the needs of the global marketplace. As part of this research, TecEd will visit several U.S. enterprises and interview five people in each.

We don't need to see any *Enterprise* work products or anything confidential; we just want to learn how the interviewees use their telepresence rooms and get their feedback on some product design concepts. The participating companies will receive a summary of the research results, and you may also have a UX staffer join the observers of the *Enterprise* interviews.

May I chat with you by phone about what we're trying to accomplish? Because my UX colleagues understand the importance of field research to user-centered design, I'm reaching out to you in the hope you can put me in touch with the right person at *Enterprise* who can approve a one-day site visit by our research team. The lead researcher on the team will be *Name*.

Looking forward to talking with you,
Stephanie

Benefits to enterprises that participate

- Valuable information about videoconferencing in U.S. enterprises

- Employee exposure to user research that informs product design

- Insights about videoconferencing attitudes and work practices within your company

- Opportunity to help define desired videoconferencing products

Invitation to people in enterprises

Subject: Help improve the telepresence meeting experience

To develop telepresence products that meet customer needs, *Client* and TecEd are conducting a research study of videoconferencing in large corporations. (*Client* is a networking and telecommunications company; TecEd is an independent research firm.) *Enterprise* has agreed to be a research site and is encouraging employees to participate.

We're looking for people who can spend up to 1.5 hours in an in-person interview during business hours on *Date*. If you participate, you'll receive $150 in cash, an Amazon gift card, or a donation to a charity of your choice to thank you for your time and input. It's your chance to play a part in defining the next generation of telepresence products so that they will be useful, easy to use, and desirable.

We're looking for people with certain types of backgrounds, so please click on this link and complete the survey if you're interested in participating: [link here] If your background is a fit, we will contact you to schedule a research session.

Please let me know right away if you'd like to participate or if you have any questions. Thank you for your interest!

Participants we recruited

- Less telepresence use than desired
- More managers than expected
- Fewer people in sales/marketing
- Some participants interviewed by videoconferencing

Lessons learned

- Recruiting participants within enterprises requires more time and skill than expected.

- We needed to recruit iteratively, at three or four levels.

- Our messaging became more concise.

- The profile of our champion/coordinator was important.

Short-form email to decision-makers

Here's what we're looking for:

* Four people who use videoconferencing at least once a month, for individual 90-minute interviews.
* To thank the interviewees, we're offering $150 in cash, as an Amazon gift card, or as a donation to a charity of their choice.
* We're looking for at least 2 managers, at least 1 person in sales or marketing, and ideally also an IT person who supports videoconferencing users.
* One of these people can be remote to *Location*, interviewed over videoconferencing.
* The interviews should take place in a videoconferencing room.

Case history 2: usability testing with youths and parents

- Redesign of TodaysMilitary.com
- Site to foster conversation between youth considering the military and their parents

Project background

- Client wanted to learn how visitors react to the site viewed on computer, tablet, or smartphone

- In what situations would they use different devices to access the site?

- What expectations do bilingual users have?

Participants the client wanted

- Potential recruits between the ages of 16-19 and 20-24

- Parents of potential recruits

- A few in each group Spanish/English bilingual
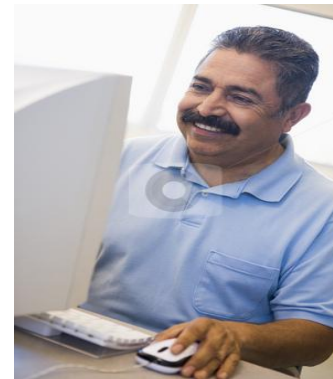
Recruiting methodology and process

- Online ads, flyers, personal contacts
- Reaching high-school candidates
- Obtaining parental permission

Posting our ad online

- Ann Arbor, Detroit, Toledo Craigslist
- Facebook page for local Hispanic community
- Also used AnnArbor.com (local online newspaper)

Flyers and posters

- African-American and Hispanic churches
- Mexican grocery stores
- Hispanic restaurants
- Community bowling league

Word of mouth

- Employees' personal contacts
- Businesses in office complex

Recruiting high-schoolers

- Teen centers
- Local Multicultural school
- YMCA
- Boys and Girls club

Obtaining parental permission

- Oral consent during phone screening
- Emailed written consent form
- Process worked smoothly

Lessons learned

- Race and ethnic balances are a challenge
- Seeking minority communities directly was ineffective
- Circle of friends worked much better
- Timeline longer than expected

Thank You!

Questions

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