Hello, Boston!
Getting the Right Research Participants
“User research lives or dies by the quality of the participants in a given study.”

- Dana Chisnell
send a payment with this return, submit an amended G-7 if additional tax is due.

**DO NOT** fold, staple or paper clip items being mailed.

**DO NOT** mail in the worksheet, keep this for your records.

### G-1003 Worksheet

<table>
<thead>
<tr>
<th>1. GA Withholding ID:</th>
<th>2. FEI Number:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>3. Amended Return:</th>
<th>4. Domestic Employers:</th>
</tr>
</thead>
<tbody>
<tr>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>5. Name:</th>
<th>6. Street Address Line 1:</th>
</tr>
</thead>
<tbody>
<tr>
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<table>
<thead>
<tr>
<th>7. Street Address Line 2:</th>
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<thead>
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<td>- 0000</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>11. Telephone:</th>
<th>Check here if correction to SSN only</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>12. Form Type:</th>
<th>W-2:</th>
<th>W2-C:</th>
<th>1099 Misc Non-employee Compensation (NEC):</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
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</table>

<table>
<thead>
<tr>
<th>1099 Other Income:</th>
<th>G2-A:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>13. Tax Year/Fiscal Year Ending:</th>
<th>Select</th>
</tr>
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<tbody>
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<td></td>
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</table>

<table>
<thead>
<tr>
<th>14. Number Of Forms:</th>
</tr>
</thead>
<tbody>
<tr>
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</table>

<table>
<thead>
<tr>
<th>15. Georgia Taxable Wages:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>16. Georgia Tax Withheld:</th>
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<td></td>
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</tbody>
</table>

[Print] [Clear]
Define who you should talk to.
DOLBY.COM CONSUMER PERSONAS

TIM the ESCAPIST
SKILLFUL  SOLITARY  IMMERSIVE

“Perfecting audio settings is a stress reliever.”

DEVICES TIM USES

GAMES
Tim plays immersive games online for a couple of hours to unwind.

MOVIES
Another immersive experience Tim loves is playing movie Blu-rays on his surround system.

AUDIO
He’s looking for perfectly tuned settings and a clean sound.

MOBILE
Even his headphones sound awesome. He’ll put these on when working.

MEGAN the ENTERTAINER
COMMUNITY  ATMOSPHERE  COMPATIBILITY

“I want to be in the middle of the action with my friends and neighbors.”

DEVICES MEGAN USES

TV & MOVIES
She hosts parties to watch the big game or the latest Blu-ray on her flatscreen.

MOBILE
Occasionally she’ll listen to music on-the-go.

GAMES
Sometimes she’ll play casual games when groups of friends

AUDIO
She uses her nice quality surround system to play the game on TV or for

TO TIM, DOLBY MEANS ALGORITHMS.

DOLBY SHOULD MEAN:
Perfectly calibrated sound for complete escape.

CORE DIMENSIONS OF TIM’S PERSONALITY

TECH CAPABILITY  EXPERT
SHOPPING  EVALUATIVE
ENTERTAINMENT MOTIVATION  SELF

TO MEGAN, DOLBY MEANS THEATER STUFF.

DOLBY SHOULD MEAN:
A way to provide the next best thing to being there.

CORE DIMENSIONS OF MORGAN’S PERSONALITY

EQUIPMENT DESIRES  LATEST
ENTERTAINMENT MOTIVATION  SOCIAL
You don’t need formal personas to define targets.

**Background Info**
- Mom of young kids
- Works full time
- Husband in school so not home @ night

**Behaviors**
- Shops ~1/month
- Cooks ~3/week
- Brings kids to store
- Cooks for leftovers extra

**Pain Points**
- Kids get bored at store & throw Fritos
- Doesn’t know what to make that’s fast, healthy, yummy
At a minimum, define who you don't want to talk to.
Translate those traits into a screener.
Let me tell you a secret.
Screeners are basically specialized surveys.
Ask precise questions.

Which snack is most delicious and nutritious?

- Apple
- Cookie
- Chips
- Carrot
- Brownie
- Cheese

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Ask precise questions.

Which snack is most delicious and nutritious?

- Apple
- Cookie
- Chips
- Carrot
- Brownie
- Cheese

Probably most nutritious.

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Ask precise questions.

Which snack is most delicious and nutritious?

- Apple
- Cookie
- Chips
- Carrot
- Brownie
- Cheese

But most delicious?
With precise answers.

How often do you take a shower?

- Every day
- Every other day
- Every 2-3 days
- Every 3-4 days
- Every 5-6 days
- Once a week or less
With precise answers.

How often do you take a shower?

- Every day
- Every other day
- Every 2-3 days
- Every 3-4 days
- Every 5-6 days
- Once a week or less

What if I shower every 3 days?
How often do you take a shower?

- Every day
- Every other day
- Every 2-3 days
- Every 3-4 days
- Every 5-6 days
- Once a week or less

(Promise, I showered today)
How often do you go to the grocery store?

- Not that much
- Sometimes
- Often
- Pretty often
- Really often
- Super often
How often do you go to the grocery store?

- Not that much
- Sometimes
- Often
- Pretty often
- Really often
- Super often

WTF does often mean?
How often do you go to the grocery store?

- Every day
- A few times a week
- Once a week
- A few times a month
- Once a month or less
- I don’t go to grocery stores
Make sure there are appropriate answers.

Which of the following best describes you?

- Sassy
- Classy
- Bada**-y
Because what if...

I’m all of the above.
Because what if...
Make it easy to answer.

Have you bought a television in the last month?

- Yes
- No
But. Not too easy.

Have you bought a television in the last month?

[ ] Yes
[ ] No
Because what that really asks is:

Do you want to be in our study?

- Yes
- No
Try something like this instead.

Which of the following have you purchased in the last month?

- Mobile phone
- Tablet
- Television
- Laptop
- Desktop
- None of the above
You can also have multiple “right” answers.

How many Apple devices do you own?

- 0
- 1
- 2
- 3
- 4
- 5 or more
You can also have multiple “right” answers.

How many Apple devices do you own?

- 0
- 1
- 2
- 3
- 4
- 5 or more

Maybe I want to talk to anyone who has 2 or more.
Prioritize.
Be careful.

MEET NORMAN NINE FINGERS
(he tried to feed the monkeys)

Please do not touch or feed the animals - they sometimes BITE
New job.
First day.
Have to make a good impression.

Remember that a screener may be your first interaction.
In short:

1. Follow the standard rules of crafting great survey questions.
2. Prioritize question order to disqualify people.
3. Ask only what you need.
4. Set the stage for a good interaction by setting tone and expectations well.
Find those people.
Recruiting can be tough.
You have options!
Stockwell Strategy, LLC

Just now ·

Have 10 minutes to spare and want to make a little extra cash? See if you qualify for our survey! https://goo.gl/LuTXF5

Can you spare a few moments to take my survey?
Please take the survey titled "Prepaid Card Payment Feedback". Your feedback is important!

SURVEYMONKEY.COM

Existing users
Tell Us Your Ethnio Story

We’re looking for people interested in ethnio to participate in a 60min phone interview about UX research. If selected, we’ll contact you to setup a time.

1. What brought you to ethn.io today?

2. Biggest current hassle with user research

3. Experience with ethnio

4. Name

5. Job Title

6. Organization
Beware the Halo effect.
PRO TIP: Make your own panel

<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
<th>G</th>
<th>H</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Email</td>
<td>Phone</td>
<td>Persona Type</td>
<td>Last contacted</td>
<td>Notes</td>
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</tbody>
</table>
Tool Panel

No. of participants
20

Age Range
- Any
- Choose
- 30 to 60

Country
- United States of America

Education level
- College/University

Occupation status
- Full-time Employee

Gender
- Any

Estimated cost
- We could do this in 2-3 days for $144 (USD)
- That's $7.20 (USD) per participant

Place order
Live intercepts
Can’t you see I’m busy?!
Which one is best?
Which one is best?
<table>
<thead>
<tr>
<th>Existing Users</th>
<th>Tool Panel</th>
<th>Pro Panel</th>
<th>Intercept</th>
</tr>
</thead>
<tbody>
<tr>
<td>• You have an existing user base</td>
<td>• You don’t already have users</td>
<td>• You have budget</td>
<td>• You want to talk to a wide spread of general population users quickly</td>
</tr>
<tr>
<td>• You have access / permission to contact</td>
<td>• You need really fast turnaround</td>
<td>• You have specific needs that are hard to find on your own</td>
<td>• You are not discussing a particularly sensitive topic</td>
</tr>
<tr>
<td>• Research requires domain knowledge</td>
<td>• You’re using a trusted tool</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• You’re building for an enterprise/ internal users</td>
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</tbody>
</table>
Get them to show up.
Set clear expectations.

<table>
<thead>
<tr>
<th>Day</th>
<th>Time</th>
<th>Activity</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mon 4/3</td>
<td>10:00</td>
<td>10:00am</td>
<td></td>
</tr>
<tr>
<td>Tue 4/4</td>
<td>10:00</td>
<td>10:00am</td>
<td></td>
</tr>
<tr>
<td>Wed 4/5</td>
<td>10:00</td>
<td>10:00am</td>
<td></td>
</tr>
<tr>
<td>Thu 4/6</td>
<td>10:00</td>
<td>10:00am</td>
<td></td>
</tr>
<tr>
<td>Fri 4/7</td>
<td>12:00</td>
<td>12:00pm</td>
<td></td>
</tr>
<tr>
<td>Sat 4/8</td>
<td>1:00</td>
<td>1:00pm</td>
<td></td>
</tr>
</tbody>
</table>

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And send reminders.
Give something to get something.
What would your users value?
Incentives don't have to be money.
OK fine, give them cash.
How much?
People like feeling important.

IT WAS ME

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What about longitudinal studies?
Experiment.
In short:

1. Set clear expectations.
2. Value people’s time and effort appropriately.
3. Explore non-cash incentives.
4. Show participants how their feedback makes an impact.
5. Don’t pay longitudinal studies all at once.
6. Experiment and switch up incentives.
Define who you should talk to.

Translate those traits into a screener.

Find people appropriately.

Get them to show up.
Resources

http://uxmastery.com/how-to-write-screeners-for-better-ux-research-results/
https://io.usabilityhub.com/why-ux-researchers-should-create-a-research-panel-d7981c647a0b
https://uxmag.com/articles/build-your-own-participant-resource-for-ux-research
Thank you!

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amanda.stockwell@gmail.com