



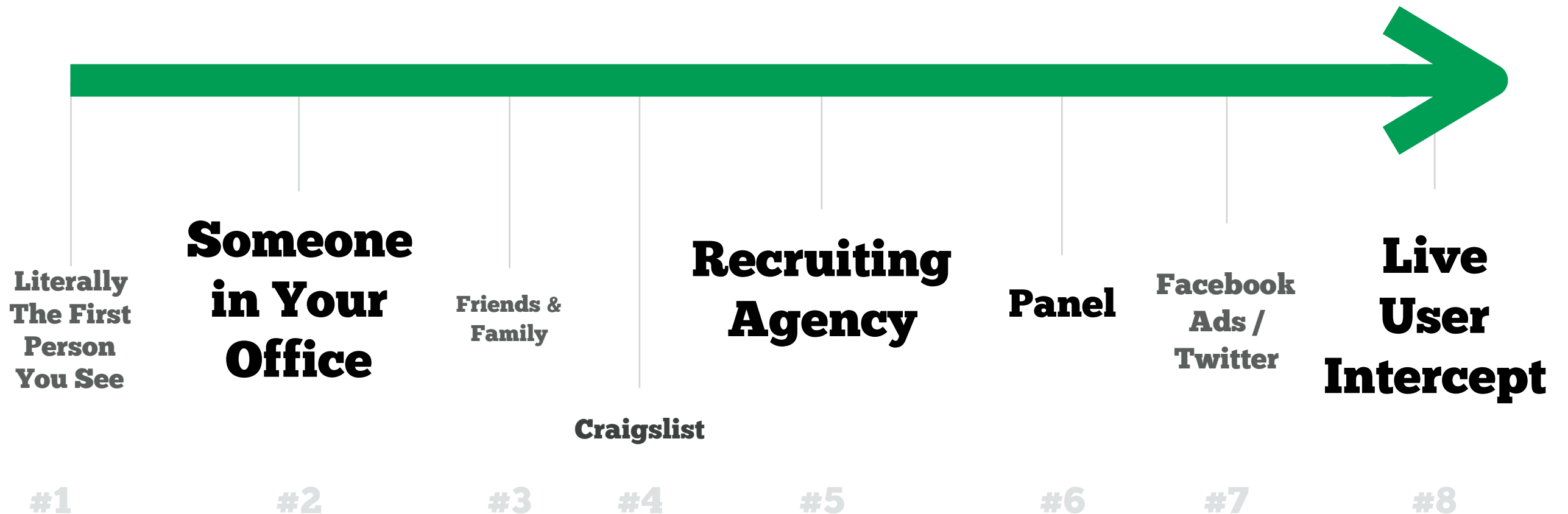
*How to Find and Recruit
Amazing Participants*

(for user research)

thx

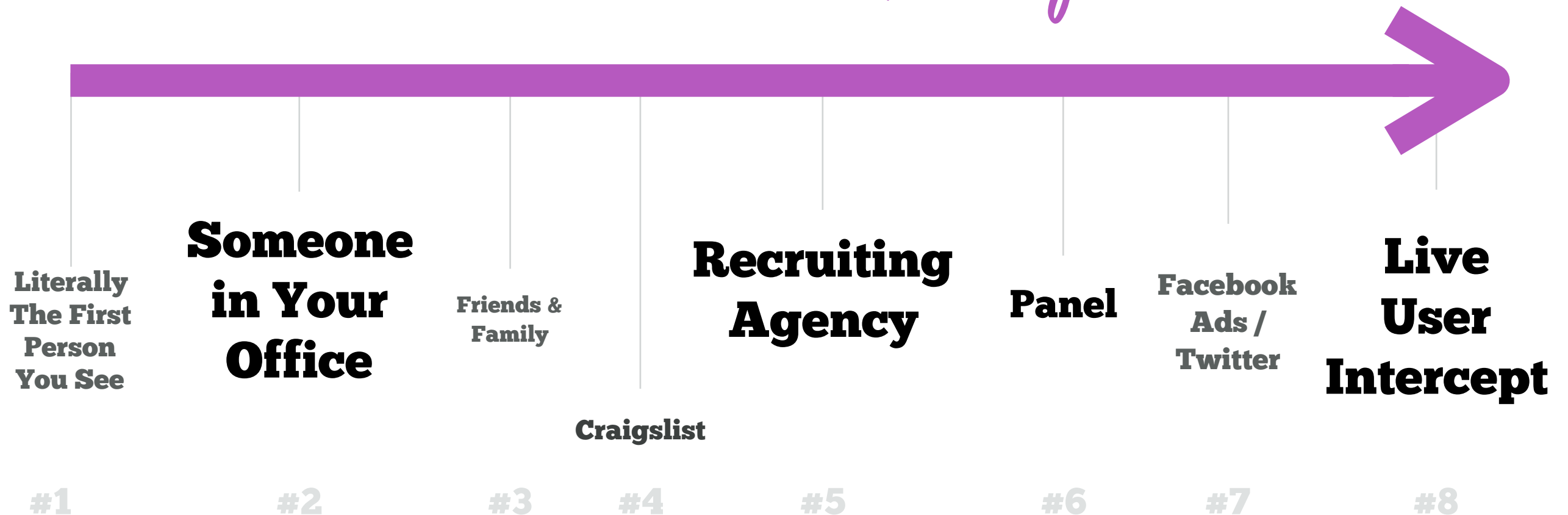
The Recruiting Spectrum

Realness



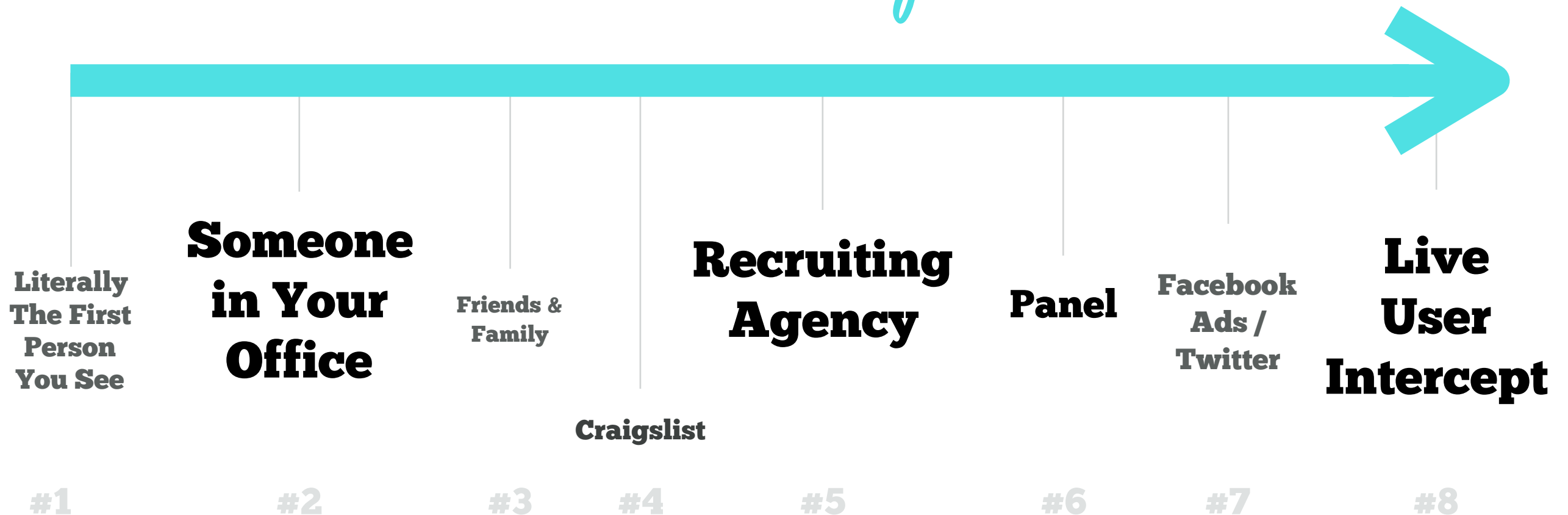
Mainly Because of...

Attachment to Your Interface



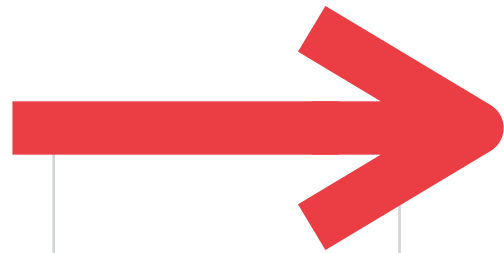
Mainly Because of...

the moment of use



Unless It's Top Secret

Shhhh



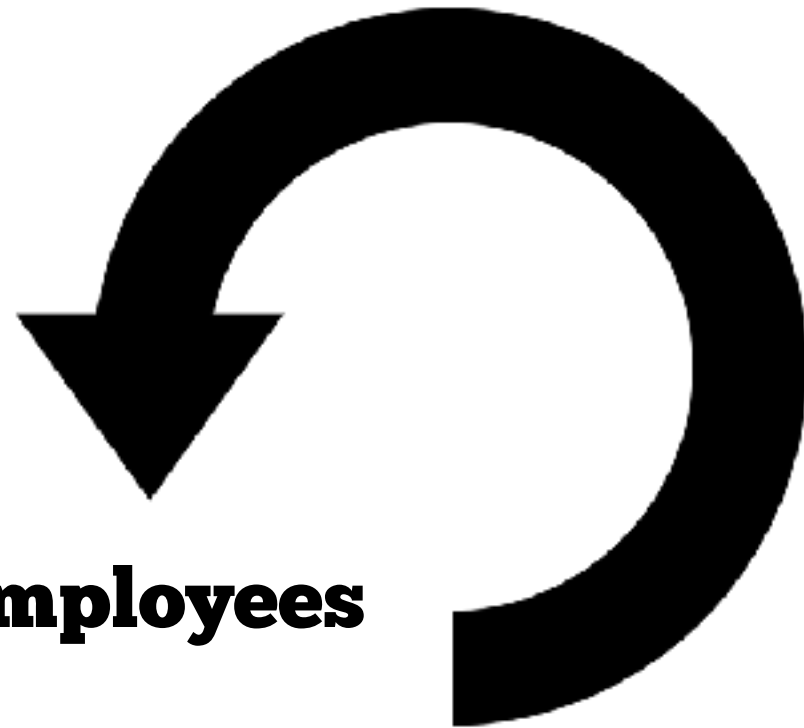
**Someone
in Your
Office**

**Friends &
Family**

#2

#3

Or When It's Complicated



Employees

**Recruiting
External
Participants
LOL**

Recruiting Participants For...

User Research

vs.

Design Research

vs.

UX Research

vs.

Insights

**Watching people
use interfaces in
order to design
better interfaces**

60 YEARS AGO



30 YEARS AGO

LET'S
RECORD
HUMANS
USING
INTERFACE
S

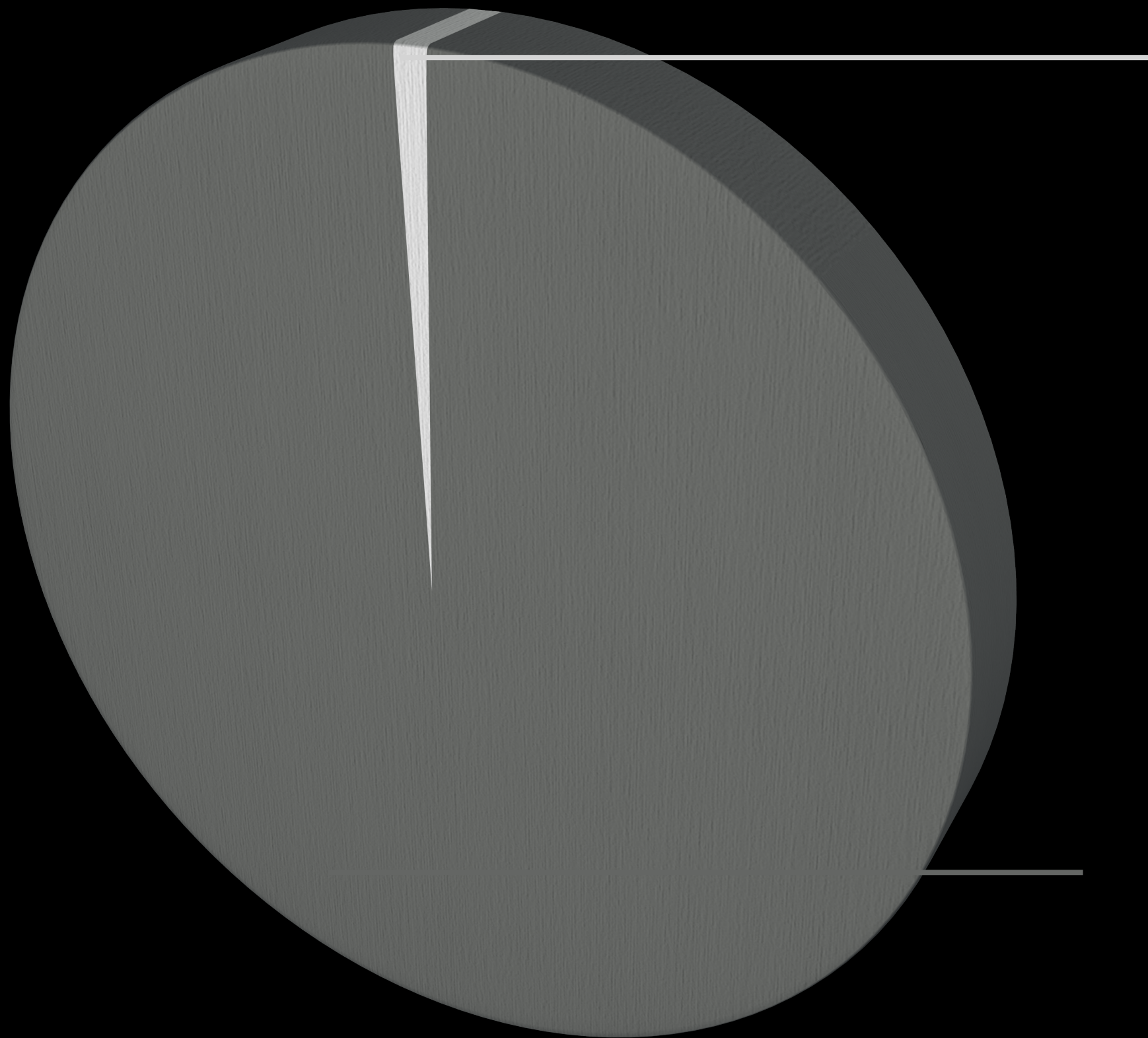


10 YEARS AGO



Vs.





1%

Humans
observing
humans

99%

Data

THE WORLD *of* RESEARCHING PEOPLE

Market Research

Opinions

- * Focus groups
- * Surveys
- * Preference interviews
- * Ad / brand awareness
- * Concept testing
- * Ideation

UX Research

Behavior

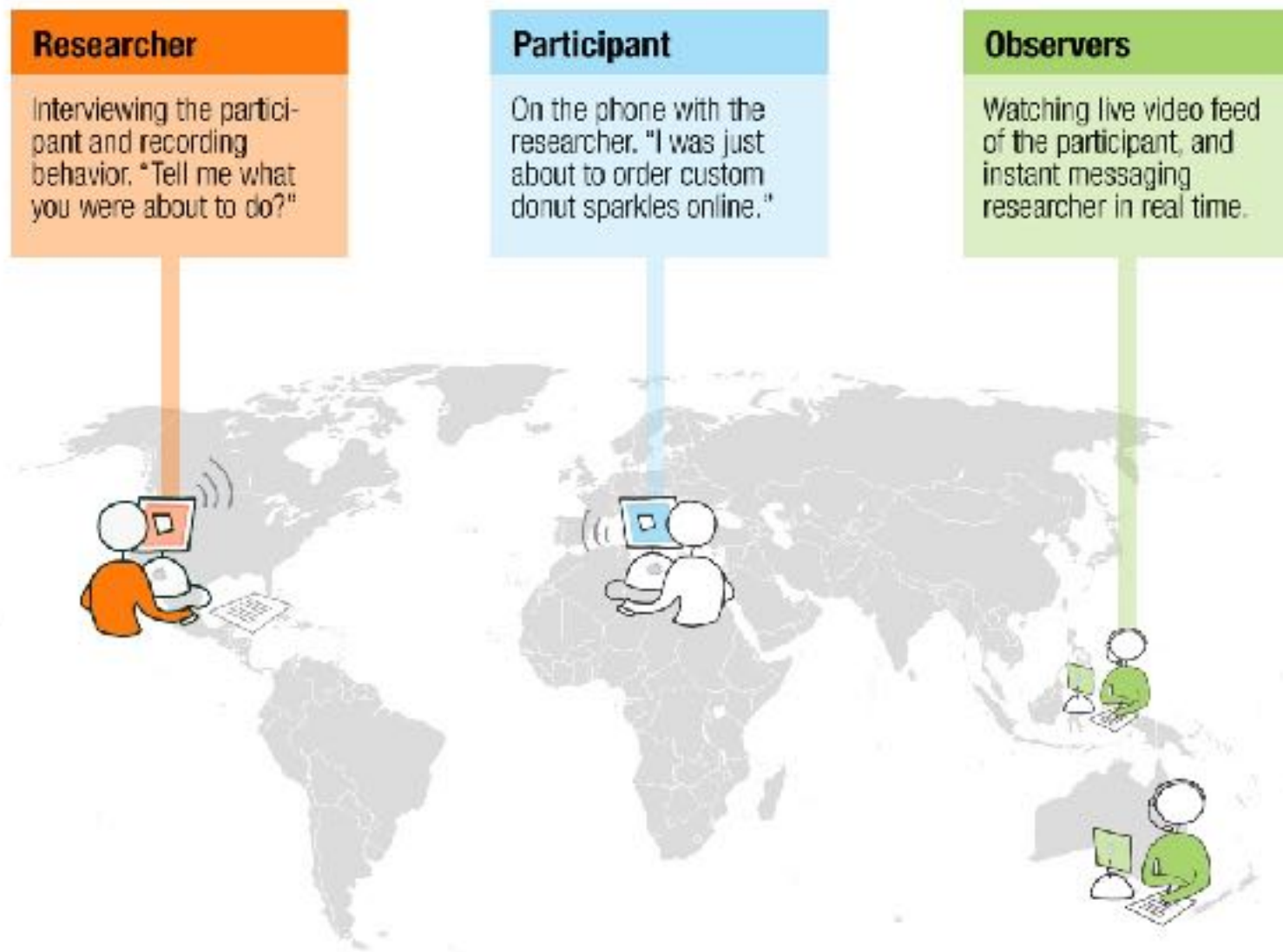
- * Ethnography
- * Think-aloud tasks
- * Conceptual (e.g. card sorting)
- * Concrete (e.g. usability on a live website)
- * Task elicitation



Analytics
Data Science
Quantitative
Research

User Research
UX Research
Usability
User Research
1:1
Observation
Lean
Research

Recruiting & Team Geography







**Btw I'm Nate
Bolt**

Mark
Jack

Steve
Reich
"Drumming"
1972

Steve
Reich

COGNITIVE SCIENCE 132
Cognitive Engineering

COURSE READER
University of California, San Diego
Spring, 1999

Professor James D. Hollan
Professor Edwin L. Hutchins

bolt||peters™

ORACLE®

SONY.



GREENPEACE



KQED



The New York Times



REMOTE RESEARCH

Real Users, Real Time, Real Research

by **NATE BOLT** and **TONY TULATHIMUTTE**

foreword by Peter Merholz

 **Rosenfeld**

PLEASE

BUY THIS

REMOTE RESEARCH
R...ers Tim...n Re...
b... a... NY TU... I... E...
fo...rd by...z...
A P...eld

BOOK





ethn.io

Let's Start With The



Recruiting Checklist



Recruiting Checklist

1. **What are you testing?**
2. **Where in the design cycle are you?**
3. **Method(s)?**
4. **Number of participants?**
5. **Target audience for the interface?**
6. **Targeting vs Screening**
7. **Incentives**
8. **Scheduling?**
9. **Stakeholders / Scrutiny?**

The Best Methods For Recruiting



- 1. Literally The First Person You See**
- 2. Someone in Your Office**
- 3. Friends & Family**
- 4. Craigslist**
- 5. Recruiting Agency**
- 6. Panel**
- 7. Facebook Ads / Twitter**
- 8. Live User Intercept**

1. Literally The First Person You See



#1

Literally The First Person You See

When to use

- **Little or no budget**
- **Time pressure**
- **Broad Audience**
- **No skeptical stakeholders**
- **Direct collaboration with designers/developers/PM**

#1

Literally The First Person You See

Pros

- **Broad Audience**
- **Easy**
- **Fast**
- **Free**
- **Dynamic Screening**
- **Logistics**
- **Don't need a screener**

Cons

- **Broad Audience**
- **No targeting**
- **Perceived as informal**
- **Geographically limited**
- **No attachment**



Targeting vs. Screening

- 2. Someone in Your Office**
- 3. Friends & Family**

They already love you

#2 / #3

Someone in Your Office / Friends & Family

When to use

- **Shhhhh top secret - world can't see**
- **You are the user**
- **Bob the builder culture**
- **Very early in the design cycle**
- **Complete game-changer**
- **No budget or time**

#2 / #3

Someone in Your Office / Friends & Family

Pros

- **Attachment**
- **Easy to find**
- **Fast**
- **Free**
- **It's their job**

Cons

- **Bias**
- **Can be hard to schedule**
- **No incentive**
- **Not seeing external use of your interface**



What is a Screener, Exactly?

Please indicate your experience level with
Evernote:

- I HAVE ABSOLUTELY NO EXPERIENCE WITH EVERNOTE
- I'M A NOVICE - I HAVE 30 NOTES OR FEWER, USE IT SPORADICALLY, AND/OR FORGET IT'S THERE SOMETIMES
- I'M AN INTERMEDIATE - I HAVE 60 NOTES OR FEWER , USE IT SOMEWHAT REGULARLY, AND/OR KEEP IT IN MIND WHEN I'M TRYING TO KEEP TRACK OF MY INFORMATION
- I'M AN EXPERT - I HAVE MORE THAN 60 NOTES, I USE IT FREQUENTLY, AND/OR I USE IT ON ALL OF MY DEVICES
- NONE OF THE ABOVE

Finish

4. Craigslist

Or similar sites/concepts

#4

Craigslist

When to use

- **Only need a bit of screening - something more targeted than methods 1-3**
- **Just enough budget for incentives**
- **Very little scrutiny on participant sourcing**

#4

Craigslist

Pros

- **All walks of life**
- **Can be fast**
- **Inexpensive incentives**
- **Habit-forming**

Cons

- **No attachment**
- **Sometimes slow**
- **Cheaters**
- **Kind of a pain**
- **Embarrassing to admit**
- **Habit-forming**
- **Requires extra vetting**

5. Recruiting Agency

Money Bags

#5

Recruiting Agency

When to use

- **\$\$\$\$\$\$\$\$\$\$\$\$\$\$\$\$ (\$150/user)**
- **When you have more budget than time**
- **The kind of targeting you need is demographics (income, location, age)**

#5

Recruiting Agency

Pros

- **Hands down the least work**
- **They can write the screener**
- **Fairly fast**
- **Someone in charge of no-shows, scheduling, etc.**

Cons

- **Expensive**
- **No attachment**
- **Professional tester alert**

6. Panel

Your own, a tool like usertesting.com, etc

#6

Panel

When to use

- **You're using an online research tool that provides users (dScout, etc)**
- **Repeat testing**
- **Other methods not allowed by your organization**

#6

Panel

Pros

- **Vetted**
- **Any technology has been tested**
- **Known entity**
- **Demographics**

Cons

- **Limited targeting**
- **No attachment**
- **Professional tester alert**

7. Facebook Ads / Twitter

Or Social Media, or Anything Similar

#6

Facebook Ads / Twitter

When to use

- **You need to reach a population you have zero contact with. Triathlete mechanics.**
- **There's some budget**
- **You have the patience to learn ad targeting**

#6

Facebook Ads / Twitter

Pros

- **Can be incredibly targeted**
- **Fast**
- **Geographically diverse**
- **Access to populations even agencies might not have access to**

Cons

- **Attachment (potentially)**
- **Gets expensive**
- **Professional tester alert**
- **Difficult to learn**

8. Live User Intercepts

Time-Aware Recruiting, In the moment, etc

#8

Live User Intercepts

When to use

- **Decent traffic web site or app (> 50K pageviews/ month)**
- **Moments matter**
- **In-depth screening and targeting**
- **Some budget**

#8

Live User Intercepts

Pros

- **Attachment**
- **The moment**
- **Fast**
- **Targeting or Screening**

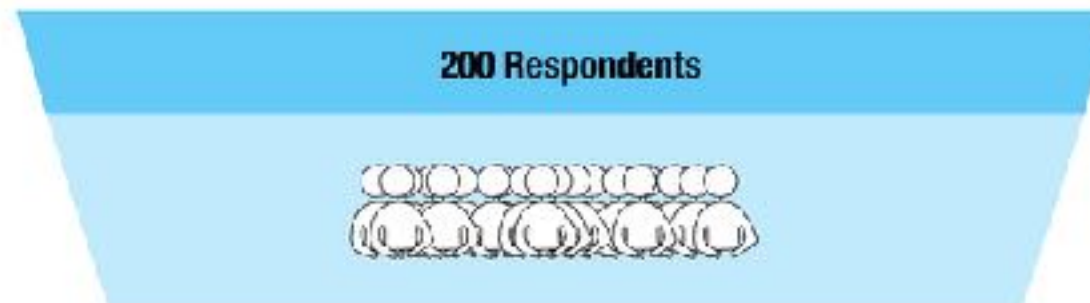
Cons

- **Scary**
- **Can be Expensive**
- **Requires some engineering resources or high traffic**
- **Totally new users**

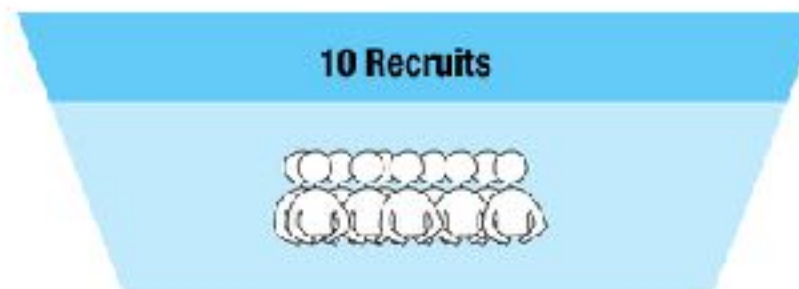
THE LIVE RECRUITING FUNNELL



The total number of people who view your online recruiting screener.



The viewers that actually take the time to fill out your screener



Qualified recruits who meet study criteria



Consenting, available, willing to install a plugin, and sane.

Let's All Try Out This



Live User Intercept

ethn.io/77226



Top stories

Iran's supreme leader: There will be no such thing as Israel in 25 years 4 h

Trump on Fiorina: Look at that face

Bush on Trump: You can't insult your way to the White House

Clinton: 'Guilty,' I'm a moderate

Refugees' unanswerable question

U.S. to take 10K Syrian refugees

Trump, Carson fight over faith

NYPD tackles former tennis star

Human ancestor species found

Inside killer's booky-trapped lair

City is 'jailing the poor,' suit claims

The club no one wants

Have a Quick Minute?

We Appreciate Your Time

We are looking for Vox users to participate in a **30 min phone interview**. To qualify, just answer a few short questions. If you're selected, you will receive an email or a phone call from one of our researchers.

powered by ethn.io



Continue



Families touched by gun violence share a common story

News and buzz

Smile, ladies...



Overview

1 Design

2 Invite

3 **Questions**

4 Thanks

5 Logic

6 Publish

7 Targeting

The Questions

Answer Types

1 This is a summary of info with a lot of bullet points:
* Here

Image & Text ▾

2 When is good for you?

Scheduling ▾

3 Email

Email ▾

4 Name

Name ▾

5 Where are you located?

Drop Down ▾

6 Phone

Phone ▾



Add New Question...

Question Shortcuts

Age Email Phone Name

Location Drilldown

When is good for you?

Planning on purchasing soon?

Been to this site before?

Smartphone? iPad or Tablet?

Purchase online often?



Give it a **Preview**

Customize the Colors

Text



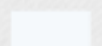
Back-ground



Buttons



Shading



Get Specific with **Targeting**.

Use these filters to only display your screener to certain types of users. Keep in mind these aren't 100% accurate. [Read all the help on this step](#)



Devices

SOME

- Mobile
- Desktop
- Android
- BlackBerry
- iPad
- iPhone
- Nokia
- PlayBook
- Windows Phone



Browsers

ALL

- Chrome
- FireFox
- IE 6
- IE 7
- IE 8
- IE 9
- IE 10+
- Microsoft Edge
- Opera
- Safari



Locations

SOME

Type city, country or region...

- London

To clarify, everywhere else is excluded



Operating Systems

SOME

- Android OS
- ChromeOS
- iOS
- Linux
- OS X
- Windows 7
- Windows 8+
- Windows Vista
- Windows 10



Calendar Emails Reminders Settings

Emails

Tour

Scheduling Mode
 PICKY

Sync Google Calendar

Backup

Scheduling Feed

	Cancelled	Email	Sep 8th 09:49am	Tester Testing
	Details sent	Email	Sep 1st 09:47am	Tester Testing
	Cancelled	Email	Sep 1st 09:38am	Tester Testing
	Details sent	Email	Sep 1st 09:38am	Tester Testing
	Response		Sep 1st 09:36am	Tester Testing
	Response		Aug 2nd 06:48am	Test
	Details sent	Email	Jul 29th 03:28am	asdfasdf
	Invited	Email	Jul 29th 03:27am	asdfasdf
	Invited Previous	Email	Jul 29th 03:17am	asdfasdf
	Response		Jul 29th 03:05am	asdfasdf
	Details sent	Email	Jul 21st	Nate Ethrin

(GMT-08:00) Pacific Time (US & Canada) ▾



< Sep 12 - 16 2016 >



	Mon 12	Tue 13	Wed 14	Thu 15
8a				
9a				
10a			Open Interview Spot	Open Interview Spot
11a			Open Interview Spot	Open Interview Spot
12p				
1p				
2p				
3p				
4p				

Ethnio Can **Pay and Manage** Your Incentives

We can do moderated or automated studies. Don't see any participants here? Simply mark them as "Completed" on the Responses page or [add them manually](#).

United States

Amazon Gift Card



Works only **for US participants**, since it's only amazon.com. Our original incentive method.

Active

International

Pre-Paid VISA Cards



Send your participants a link that lets them choose between **virtual VISA, a physical VISA and more**. [Check out how it works here](#).

Choose

Manually add 

And Now Some Common

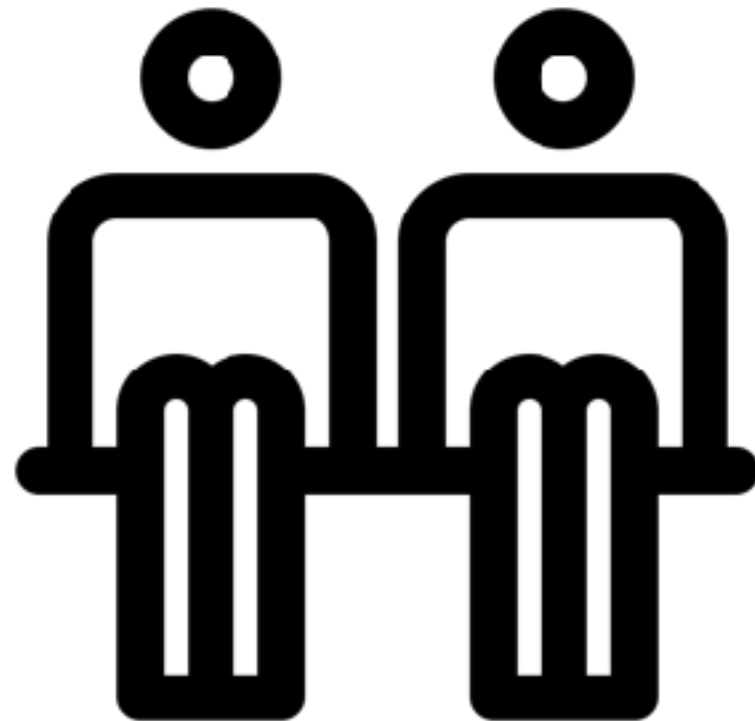


Recruiting Pitfalls

No Shows



Solution: Schedule Backups



SALT-N-PEPA

LET'S TALK
ABOUT *BIAS*




Solution: Behavior.



Quiet Users



Garden Variety Demographics

▼ Age	<u>25 - 45</u>
	
▶ Income	<u>\$40k - \$100k</u>
▶ Gender	<u>Female</u>
▶ Country	<u>Any</u>
▶ Web Expertise	<u>Any</u>

Summary of



- **No Shows**
- **Bias**
- **Quiet Users**
- **Garden Variety Demographics**
- **The Quant(s)**

Scheduling + Recruiting = ?



The Amazing Part



*How to Find and Recruit
Amazing Participants*

(for user research)

The Amazing Part



- **Open-ended questions**
- **Attachment to your interface**
- **Extreme scenarios - generative vs formative**
- **Phone calls**
- **Involving stakeholders**
- **Online Consent**
- **Staged Incentives**



**If NASA can
do THIS from
153 million
miles away,
we can meet
our users
where they
are, even if
we're a couple
thousand
miles away.**



Thanks for listening

Recruit Like The Wind

fin.

Participant Recruiting Take-Aways

remotereseaer.ch/urfe

**And also the ethn.io code for 20% off
is ROSENRAD**

Samples

Moderator Script: UX phone interview

July 31, 2012
[3 Comments](#)

When preparing to conduct a remote UX study, we all know there's a lot of planning that needs to take place before actually speaking with a participant. Here, we provide an example of a Moderator script template that can be used when conducting remote UX sessions with participants. The importance of having a thoroughly thought [...] [Read more.](#)

Goals and Objectives

June 28, 2012

Communication between client and researcher and/or designer is extremely important for any remote or in-person research project. This "Kick-off Agenda" as we call it, is a simple layout that touches on certain aspects of initial communication and understanding that is key to the launching point of a project. Specifically, the Goals & Objectives section is [...] [Read more.](#)

Online Consent

November 26, 2010
[4 Comments](#)

If you're doing any kind of user research, you've at least thought about getting official consent from your participants. Perhaps you've got a signed piece of paper or verbal consent to record sessions, or maybe you have a team of lawyers following you around with actual carbon copies in triplicate. Either way you need consent [...] [Read more.](#)

Nate Bolt

nate@ethn.io

@ethnio