Quick-Start UX Research Recruiting Guide

This UX research recruiting guide is a template. Copy and adapt it as needed to train your team on the research processes, tools, and guidelines unique to your company. We've used User Interviews tools and practices as an example, but feel free to customize this guide with tools of your choice.

🔑 ***Key:*** *Anything highlighted in purple is information that you should swap out if you're not a UI user.*

When and how to plan a study

🟢 DO research when:	🔴 DON'T do research when:
• You need clarity on the "why" behind a problem or solution, the motivations and beliefs that drive user behavior, or the big-picture vision of your company. • You need to make strategic decisions about an existing product or service. • You need to define how and why users might interact with a proposed solution to determine whether or not it's worth moving forward. • You need to evaluate a product or service to identify areas for improvement. **Pro Tip:** Get started using this User Research Plan Template.	• You've already made the decision, and additional research won't change it. • You're doing research for purely academic, curiosity purposes. • Your research question can be answered by searching Google or referencing previous research reports in the insights repository. • The answer to your research question is "yes" or "no." • You're conducting research only to get political buy-in or validate pre-existing assumptions. **Pro Tip:** Conduct a literature review to review existing data before diving into a project.

How to recruit participants for research

Step 1: Identify your audience criteria and sample size.	The most important part of any research project is identifying who you need to speak with and why. Your UX research plan should help your team align on recruiting parameters like: • **Internal vs. external users:** If you're recruiting new users, launch a Recruit project. If you're recruiting users from our panel, launch a Hub project. • **Consumers vs. professionals:** Consumers are folks found in the general population, while professionals are chosen based on things like job title, skills, industry, etc.

	• **Key criteria:** What's most important for your study? It could be job title, age, skills, home owning status, or any other criteria you need to target the right people. • **Sample size:** How many participants do you need to talk to for statistically significant data? It's good to set a goal number "N" and a minimum number just to be safe, considering that some people might not show up or cancel. So, for every 10 participants you want, aim to recruit 2 extra, just in case. • **Study logistics:** How much time will it take you to find the right participants? And where, how, and when will the study actually take place? If you're setting up in-person studies, be sure to follow safety and health protocols. **Pro Tip:** Identifying and reducing bias is an ongoing process. Get tips for minimizing bias throughout every stage of the UX research process.
Step 2: Choose an attractive incentive.	Paying participants appropriate incentives is super important—it's a great way to thank participants for their time and is simply a good, industry-wide practice. • Pick a fair incentive based on participants' background, time to complete the study, and how involved they'll be in the research. • For instance, in-person studies typically warrant a higher incentive than remote studies, since participants need to put in more time and effort to come to the location. **Pro Tip:** Use the UX Research Incentive Calculator to get a data-backed recommendation for the right incentive amount.
Step 3: Set up a screener survey.	Create a screener survey to approve or disqualify applicants. Sometimes, you can reuse past screener surveys in new projects. • Keep it short and sweet—limit your screener to 15 questions or fewer. • Stay neutral to avoid bias in responses. • Consider double-screening to ensure participant fit and credibility. • Watch out for common screener survey mistakes—don't focus too much on demographics, avoid leading questions, or make good use of skip logic.
Step 4: Write a study description and invite.	Write a compelling study description and invite emails—you can use these templates as a starting point. • Use plain language (write like a person!). • Set the right expectations with a clear description of next steps. • Always send at least one test email to yourself or a co-worker to make sure everything looks good and works smoothly.

Step 5: Launch recruitment and send reminder emails.	Launch your project and let the applicants roll in! Consider the ideal time to send recruitment invites. ● For professional audiences, weekdays (Mondays through Thursdays) during working hours tend to yield better results than Fridays/weekends. ● Don't bombard people—stagger recruitment reminders every 2+ days. ● Remember to keep time zones in mind when doing outreach!
Step 6: Adapt if your response rate is low.	If your response is lower than expected, try some of the tips and tricks below to help increase engagement: ● Increase the incentive amount to make it more enticing. ● Go back to your recruitment criteria and identify any low-risk criteria you can be more flexible on. ● Reach out to Customer Success & Development if you're trying to recruit our own customers. They may be able to reach out on your behalf! ● Simplify your invite emails and make the language more fun/engaging. ● Extend the deadline or offer more session times to allow for more flexibility.
Step 7: Collect signatures for consent and NDA forms.	Consent is key! A consent form is a legal document informing participants of what to expect with your study, and ensures data privacy compliance for both the researcher and participants. Consult with the UXR and legal teams to get templates and guidelines for NDAs and informed consent forms. **Pro Tip:** You can use User Interviews's Document Signing feature to collect signatures from participants.
Step 8: Schedule sessions.	Connect your calendar and update your availability to User Interviews to allow participants to schedule session times. You can always extend your study if you need to. Don't forget to send a session confirmation email. **Pro Tip:** Be prudent about the time slots you keep open; if you need to cancel or reschedule a participant on UI, we'll be charged a cancellation fee.
Step 9: Conduct sessions.	This is the fun part—conduct sessions! ● Check out the Discovery, Evaluative, and Continuous Methods modules in the UX Research Field Guide for tips and best practices. ● Use these templates and tips to take effective notes. ● Make sure you hide participant names in Zoom recordings to protect PII. ● If participants don't show up, UI will replace them at zero cost.

	• For product managers and UX designers: Refresh your UX research knowledge with tailored guides for PMs and designers.

Tools we use **If you're not a UI customer, swap this section with info about your preferred recruiting tool.*

User Interviews is a recruiting and panel management tool that lets you source, screen, track, and pay participants in your target audience. Recruit provides on-demand access to UI's network of 6 million research participants, while Research Hub is a research CRM for teams that do user research at scale.

- Use **Research Hub** when you need to recruit existing customers, such as when you're testing improvements or updates to the existing experience.
- Use **Recruit** when you need to recruit external participants, such as when you're testing among novices or competitors' customers.

Got questions? Contact your research team lead or success@userinterviews.com for help.