PARTICIPANT RECRUITMENT PRACTICES
The key to making usability testing cheap, easy, and scalable

By Victor Echevarria

"Let the data make the decisions." This is the position advocated by Andreessen Horowitz General Partner Jeff Jordan (former CEO of OpenTable, former President of PayPal), and an increasingly popular mantra being adopted by a broad range of companies, both small and large. Despite the tidal shift toward data-driven decision making, many companies (early stage startups in particular) find the acquisition of usable data can be prohibitively expensive. Fortunately, there does exist something of a magic bullet when it comes to decreasing the amount of resources it takes to conduct usability testing: streamlining the participant recruitment process. In the coming pages, I'll discuss how to spend less time and money on recruiting participants. I'll also provide details about how to deal with the most common logistical hurdles of participant staffing.

Better user testing while spending less time and money? It's possible.

A successful usability study doesn't need to be a drain on resources, in fact it's entirely possible to conduct exceptional research while saving time and money. A considerable portion of the resources for each study goes into one bucket: participants. Between recruitment, retention, compensation, and scheduling, there's a lot of room for optimizing the participant process from start to finish. Doing so not only saves time and money, it can lead to more efficient, reliable research as well.

Key advantages to usability testing

Improve User Experience
Reducing friction associated with your product allows users to have a more positive experience, adds value to your offering, and improves the perception of your brand.

Save Money
Understanding what needs to be fixed in your product during the build and testing process can spare you costly mistakes down the road.

Save Time
Catching bugs during the build and testing process prevents you (and your team) from spending time sifting them out later.

Increase Revenue
The more user-friendly your product, the more conversions you'll see. Testing helps identify the clearest path from first contact to transaction.

Inform Decisions
Gathering user feedback reveals problems and solutions. This type of data provides more reliable returns than intuition alone.

Deflate participant recruitment costs

Just because the return on investment can be big doesn't mean companies, particularly startups on a tight budget, can justify overspending in the near-term. According to the Nielsen Norman Group, full-service agencies can total $107-125 per test subject plus additional compensation, pulling testing in-house eliminates recruitment fees to agencies, but these costs are quickly eclipsed by additional staff salaries or time away from other priorities. The same study finds in-house costs can total $64-81 per test subject (with the US West Coast representing the higher end of that range).

In order to combat the heavy fees associated with usability test participants, companies are increasingly seeking out alternatives to pricey full-service agencies. Miso, a design and engineering driven startup dedicated to making TV watching better through a second screen experience, conducts usability testing regularly to propel innovation. Cost was a major factor for Miso (as it is for most startups), so they tested out a variety of channels to source their participants: internal recruitment, Craigslist, TaskRabbit, and full-service agencies. According to Jesse Geller, the product designer leading Miso's usability testing process, TaskRabbits submitted offers lower than his anticipated budget. Sourcing participants this way made it possible for Jesse and his team to adjust their sample size to generate more feedback. By streamlining their recruitment process, Miso saved money and optimized their testing.

taskrabbit

Decrease your internal time spend

According to a Nielsen Norman Group study, 24% of companies that do their own recruiting spend more than two hours per participant involved in the study. Considering the median salary for product managers (an in-house position that often supervises user testing) in San Francisco is upwards of $100k (according to Glassdoor), this type of time commitment certainly adds up quickly.

GoodSearch, a search engine which donates 50 percent of its sponsored search revenue to the charities and schools designated by its users, wanted to identify a way to cut down the hours involved with recruiting usability participants. They first looked to Craigslist, but found that the burden of sifting through and responding to email inquiries didn't do anything to alleviate their time investment. Tim Kutnivk, Assistant Product Manager with GoodSearch, decided to try out TaskRabbit to establish a channel for inbound interest that didn't require as much maintenance. "TaskRabbit overall made it possible for us to do our user testing conveniently and hit our deadlines," said Tim. "We saved time by finding people who were willing to talk to us, reasonably priced, available on our schedule and willing to come to our office. We scaled back when we wanted to and scaled up when we wanted to, giving us the flexibility to work out new prototypes and check our assumptions/hypothesis." Using a service with a vetting process and marketplace structure takes care of much of the time commitment — all participants are already background checked, available on the needed dates, and committed to doing the testing for a specified fee. Tim was able to review profiles, filter by demographics and geographies, select the participants, and even manage payment through the site.

What benefits from usability testing?

Web & Mobile
Testing helps developers understand user reaction and friction points.

Video Games
Testing helps designers gauge how intuitive users find a gaming experience.

Consumer Products
Testing helps streamline design and reveal functionality of consumer products.

Mobile Apps
Testing helps all types of designers understand the impact of their decisions on the end user.

Advertising & Marketing
Testing lets creative teams understand perception of brand identity, messaging, and specific campaigns.

The three biggest logistical challenges of usability testing staffing, demystified

Figuring out how to reduce the time and money required to recruit participants is only the first phase. For a usability study to run efficiently and continue keeping resource costs low after the participants are found, several additional logistical challenges must be addressed. Key challenges that many companies run into with participants outside of the basic recruitment phase include sourcing the right sample, participant reliability, and coordinating scheduling and payment details.

Sample sourcing

Identifying and selecting the right sample demographic is one of the most important factors in the success of a usability test, and it's also one of the most challenging. Since each test has different goals and objectives, there's no such thing as a universally "ideal candidate." There are, however, a few best practices championed by user research thought leaders such as Jeff Sauro (MeasuringUsability.com), Jim Ross (UXMatters.com), and Michael Summers (UserResearch.com). First, find people who fit your company's target user base. Next, figure out a way to filter for factors such as geography, education, interest, and technical ability. That's exactly what CruiseWise did in a recent round of testing. According to content lead Jordan Berry, "The diverse pool of TaskRabbits made it easy for us to choose testers that would give us a variety of responses."

Participant retention

A lot of time, money, and effort goes into isolating the right user testing participation group, so it's important that each participant shows up. The average no-show rate in the United States is between 5% and 15%, according to "The Handbook of Global User Research." More than an inconvenience, when a user participant doesn't show up it can have major implications: a test may not be able to run without full participation (leading to pricey, vacant time slots), or the data may be impacted by the lower number of participants. This is to say nothing about the time and money lost due to low participant retention. In a recent survey to businesses that use TaskRabbit for usability testing, a 100% completion rate was reported.

Scheduling & payment

Even if a company finds a way to streamline the time and money associated with sourcing participants, it's easy to burn through resources dealing with the logistical challenges of scheduling, managing, and paying these participants. According to product lead Adithya Raghunathan of Sifteo, who's used both TaskRabbit and Craigslist for participant recruitment, "Payment is much simpler over TaskRabbit, because we have a business credit card hooked up, and it auto-deducts with a press of a button. For Craigslisters, there's a lot more overhead. We need to collect mailing addresses, issue a check, and take the risk that we have to void a check we issued." Using a centralized and intuitive service for scheduling and tracking each participant makes it easier to manage the testing process. TaskRabbit in particular provides a convenient and secure way to handle distributing payment to participants and keeps a downloadable CSV record of all transactions.

Take your testing to the next level

Laying the foundation for easy and affordable usability testing provides a baseline for taking future tests to a new level. Not having to worry about resources and logistics involved with participant recruitment lets you focus on conducting a variety of tests with more frequency.
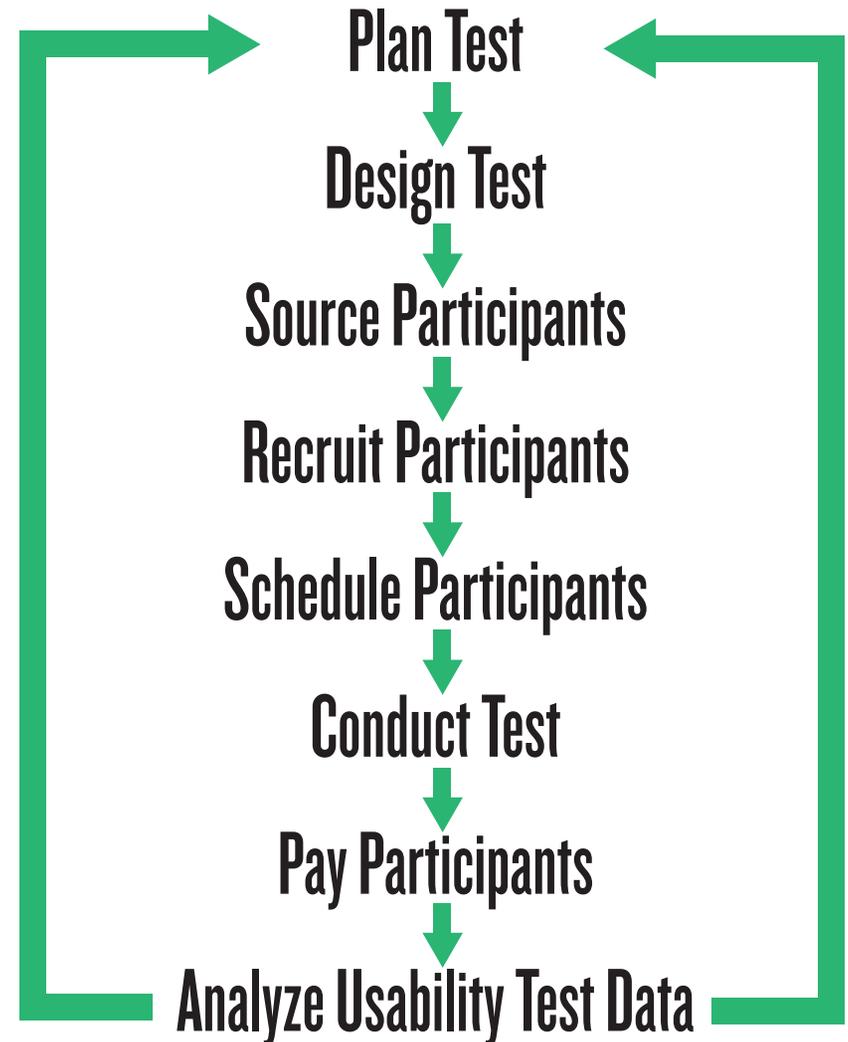
Vary Testing Formats
Adjusting the format of individual tests makes it possible for you to collect a greater variety of information. Since using the TaskRabbit platform makes it possible to directly access virtual test subjects, you can easily expand beyond in-person testing. What's more, it allows you to experiment with various unmoderated formats as well, such as A/B testing, surveys, or remote testing tools.

Increase Testing Frequency
Usability testing is not a one-time action — successful companies build it into a program. Actionable data emerges from consistent usability testing, and these results help a team continually make informed product and design decisions. Once the resources and logistics associated with participants are streamlined, small businesses can mimic the ongoing testing programs that large corporations invest in heavily.

The Usability Testing Process

Plan Test

Design Test

Source Participants

Recruit Participants

Schedule Participants

Conduct Test

Pay Participants

Analyze Usability Test Data

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