



2022-05-23 - How to Recruit Those Hard-To-Reach Research Participants

May 23, 2022 - Led by Jared Spool

Great innovation starts with excellent research participation.

"We can't access our users."

"Our users are hard to schedule for research sessions."

"It's a new product, so we don't have any users yet."

For many teams, recruiting participants for UX research becomes a big challenge. Without good participants, they won't get the insights they need. Yet, they struggle to get people who might use their products or services into research sessions.

Recruiting hard-to-reach participants doesn't have to be complicated. However, it will take concerted and deliberate efforts of the research team.

Effective UX research leaders dedicate time and resources to building out a network of participants. They value their participants and make the relationship reciprocal.

In this discussion, Jared Spool will explore the techniques effective leaders use to grow their network of research participants. In addition, you'll discover how an excellent participant recruitment approach will improve the quality of your team's research insights.

Before the talk gets started:

- **How this discussion will go:**
 - 20 - 30 minutes short presentation on today's topic.
 - Remainder of the time will be spent discussing your questions.
 - Please put your questions in the chat.
 - Please change your Zoom name to your actual name.
 - Byron will collect the questions and pick the ones we'll answer today.
- **Things to keep in mind with Zoom:**
 - If the little Chat pop-ups get distracting, feel free to open the chat window.
 - Please put your microphone on mute.
 - If Byron chooses your question, you can unmute to talk about it with Jared
 - Zoom's *Speaker View* will let you keep Jared visible and you'll see what he's presenting on the screen.
 - This session is closed captioned.

We will post the recording for this session within a day.



Today's Notes

Hard-to-reach participants are often because **we've made them hard to reach.**

If we can sell to them and support them, we can research them.

Teams that believe their research participants are hard to reach are limiting their own thinking.

Many UX leaders approach recruiting improvement as a tool set or skill set change.

The most important changes are Mindset changes.

Mindset Shift #1: See recruiting as informing our understanding of our users

Many teams try to outsource recruiting.

They use recruitment firms or panels.

They try to recruit through screening questions.

Where they assert there's a predetermined set of questions to "qualify" a participant.

These approaches lead to confirmation bias.

We only recruit people who we think match pre-determined expectations of who our users are.

Effective research efforts treat the recruiting process as research.

What does it tell us when we're not sure if someone would be a great participant?

Every discussion with a potential research participant should grow our understanding of who our users are.

Or who they aren't.

Mindset Shift #2: Move from a transactional mindset to a relationship-building mindset

Many teams try to hire participants on an hourly basis.

This reinforces a transactional mindset.

We want to move past transactions to get to relationships.

We want to have deep discussions and understanding of the real challenges of our users.

Build relationships upon other relationships

This is called *Snowball Recruiting*.

Mindset Shift #3: Treat research as a long-game activity

Many teams only think about the current set of research sessions.

They are conducting research reactively.

They only think about the participants they need in the next few weeks.

Future research is not part considered.

Recruiting must be a long-game process.

Effective research efforts create a long-term research agenda.

That agenda contains a list of important questions necessary to reduce risk and improve understanding.

The recruitment must inform that agenda.

Every opportunity to talk with a participant can help our understanding of future work.

We can identify individuals who will need future capabilities.

We can start to understand what are the different scenarios and attributes of those future capability users.

Mindset Shift #4: Push our focus to be on users at the edges and margins of our experiences

Many teams only look for a preset definition of an "average user."

They focus on *happy path* uses of the product or service.

Averages forces our UX work to produce mediocre results.

We need to look for the edges and margins.

What are the use cases that don't quite fit the *happy path*?

What makes those use cases unique?

Who are the people using our product or service that it wasn't designed for?

Who are the people that are harmed when someone uses our product or service?

How do we build up our understanding of their experiences.

We do ourselves harm when we start with personas to decide who to recruit.

Especially 'proto-personas.'

We should be focusing on scenarios.

Especially scenarios that surprise us.

Recruiting must support *proactive* user research approaches.

We need to focus on participants that will increase our understanding of the problems we're trying to solve.

Work directly with sales to understand who the challenging customers are.

Work directly with sales support to see why customers need handholding.

Work directly with product support to see who has trouble with our products.

Hard-to-reach participants are often because **we've made them hard to reach.**

Key mindset shifts to gain more access to hard-to-reach participants

- We must see recruiting as informing our understanding of our users.
- We must shift from a transactional mindset to a relationship-building mindset.
- We must believe research is a long-game activity.
 - Recruiting must be a long-game process.
- We must push our focus to be on users at the edges and margins of our experiences.

Recruiting must support *proactive* user research approaches.

We need to focus on participants that will increase our understanding of the problems we're trying to solve.

EVENTS CALENDAR



Leaders of Awesomeness Events Calendar.

Subscribe to the Leaders of Awesomeness calendar. When we add new sessions, it will automatically add them to your calendar.



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Copy and paste this link into the subscription feature of your calendar. *Just clicking on this link will do the wrong thing — it will add the events into your calendar without subscribing, which means you won't see new events.*

- **If you use Google Calendar:** You can subscribe by clicking the + button next to **Other Calendars** and then choose the **From URL** option.
- **If you use Outlook:** Sign into your calendar on web: <https://outlook.office.com/calendar/>. Click **Add Calendar** and **Subscribe from Web**. Paste in the **calendar URL** and finally click **Import**.

Next week kicks off our **Taking Control of Agile UX** intensive. We'll continue our **Talk UX Strategy** session the week of April 11, we'll share those topic sessions coming soon.

UPCOMING TOPICS

Upcoming Talk UX Strategy topics.

User Research that Influences Big Decisions

Tuesday, May 31, 2pm ET (18.00 GMT)

Note: This session is on Tuesday due to Memorial Day.

Advanced Approaches to UX Research Intensive

Monday, June 6 - Friday, 10 with 2pm ET (18.00 GMT) and 7pm ET (23.00 GMT) sessions



ADVANCED APPROACHES TO
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Advanced Approaches to UX Research intensive

Advanced Approaches to UX Research

Drive Strategy • Gain Influence • Deliver Innovation

June 6-10

Intensive led by Jared Spool.

Join us for the Intensive: <https://research.centercentre.com/>

Once you've joined the VIP Intensive, feel free to DM Leslie or Summer in the Leaders of Awesomeness Community space.

DM Dr. Leslie Jensen-Inman

DM Summer Kohlhorst

Research is often the step that gets overlooked when discussing UX.

It's usually the first thing cut from the project because too many executives see it as a "luxury" and not strategically important. Of course, you know that's wrong — how else are we supposed to gauge the ways we can improve our users' lives?

Research guides innovation

Right now, your organization faces some critical decisions. Decisions that will determine if the future is easy or extremely difficult. Decisions that will choose the best way to focus limited resources. If made right, decisions will delight your users and customers, or, if made wrong, will completely frustrate those customers and cost the organization money and reputation.

When important decisions have to be made, do we have the data and insights to guide the decision-makers to the best choices? This is the product of great user research. It's the superpower that UX leaders just like you can bring to the table.

You don't have to figure this out alone.

What if we offered you help to discover what your UX research efforts truly need? We can give you a guiding hand in putting together a plan that makes your UX team strategic, influential, and innovative.

Join our [Advanced Approaches to UX Research intensive](#) where Jared Spool will dive deep into how to recast your UX research from being undervalued and the first to be cut into a high-demand leadership power tool. This path will include knowing how to...

- Describe and measure the delivery of value, and focus your team on using that as their definition of "done."
- Build up your team's research capabilities so your organization increases the value of what your team delivers.

Join us for a week dedicated to getting you unstuck and on the road to success with your research process from June 6-10. [Join us through our VIP UX Leader](#) experience to get the absolute most out of the Intensive and transform your organization into an industry leader who delivers hands-down the most innovative experiences.

As a **VIP UX Leader**, you'll get everything you need to transform your organization into a learning culture that understands your users and their needs. You'll be able to...

- Build your organization's tailored UX research transformation plan with our team.
- Attend 3 **VIP Train-the-Trainer sessions** with Jared so you can sell, empower, facilitate, and implement your advanced UX research transformation.
- Attend 3 **VIP Intensive Prep Coaching sessions** with me so I can guide you in changing the way your organization values, conducts, and benefits from great UX research.
- Attend 2 **VIP Get Unstuck: Advanced Approaches to UX Research sessions** with Jared so you can tackle any new challenges and obstacles you've learned you now face.
- Have **VIP Extended Recording and Notes Availability until July 11, 2022**, so you can catch up on what you missed and share the recordings and notes with other team members.

In addition to that, we'll be there to coach, advise, mentor, and support you as you lead your transformation. You can **sign up as an Individual for \$97** or **sign up to bring your *entire* team for \$147**.

You can also [attend the Intensive for free](#). You won't have access to everything listed above, but you will still learn how to effectively use deep and insightful research to drive innovation in your organization.

Take control

It's time to show that UX research is vital to delivering innovation. It's time to become better prepared to serve your UXers, customers, team, and organization. It's time to take back control so your work and work processes are no longer frustrating — instead, they're delightful.