

Finding a User Recruitment Vendor

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When a company gets serious about conducting usability tests on a regular basis, one of the logistical challenges that arises is where to get a steady supply of users. While in some situations it may be appropriate to have internal people or customers participate in usability tests, it's often both more useful and less risky to bring in people who have no prior relationship with your company. But these people can be difficult to recruit because – by definition – you have no business channel in place for reaching them.

Some companies develop their own user databases and devote permanent staff to handle the screening and scheduling. But for companies with resource constraints it makes more sense to outsource user recruitment, at least at first. Here are some suggestions for how to find a vendor to conduct your user recruitment.

Sourcing

For a preliminary source of potential companies that can provide recruiting services, look in the yellow pages under “Market Research.” A physical phone book is often superior to an online one for this type of search, because an online directory may only have the company name, address and phone number. Company names may not be very descriptive – print ads are useful because they list services.

At the time of this writing (early 2001), it would be quite unusual to see “usability testing” advertised as a market research service, so look for firms that conduct focus groups. Focus groups are similar to usability testing in that participants who meet a certain profile travel to a facility at a scheduled time. Thus, any company that's accustomed to conducting focus groups should theoretically have the resources to handle recruitment for usability testing.

The geographic location of the company is something you should consider, but don't necessarily rule out a company because they're not in your immediate area. Some companies have the capability of recruiting people in other cities.

Screening

Once you've identified a handful of prospects, here are some questions to ask during your initial phone interview with a representative of the company:

- 1) *Do you recruit participants for projects that are not conducted at your facility?* It's recommended to ask this question first – some companies require that you rent their facility before they'll provide participants for you. That's fine if you want to use their facility, but fees can run upwards of \$1000 a day, and it removes some flexibility from your ability to schedule tests. And if you're going to be doing frequent testing, it's usually best to hold the tests in a location convenient to the development team. Some companies may offer a host/hostess to greet users and give them their payment. This can be useful if there is no receptionist available at your test facility.
- 2) *What is your fee to recruit people?* Expect to get questions in return, because it's common for the per-person recruitment fee to vary depending on how specialized the user profile is. In fact, you might question how experienced the firm is if they give you a specific answer without finding out more about what you need. If the company does primarily consumer product testing, you'll want to make sure they realize that your user profile may be more specialized than what they're used to – it's a lot harder to recruit bond traders or network managers than it is to find people who use dishwasher detergent. (Tip: By this point in the conversation, you may find yourself trying to explain usability testing to someone who's never heard of it before. It may be helpful if you refer to it as an “in-depth interview” for now, and save the detailed explanation for after you've chosen the firm you want to work with.)
- 3) *How do we provide the user profile to you?* Some firms require that the client write the actual screener – a step-by-step flowchart of questions used by a recruiter when interviewing a prospective user. With other firms, you give them a list of characteristics you want and they do the rest. Either approach can

be successful, but if you've never written a screener before you'll want to be sure they can provide you with guidance, and it does take additional time on your end. Keep in mind that the telephone screening will likely be done by someone who doesn't know much about your company, so you may need to be very specific in your written description of the users. For example, to avoid recruiting a user who works for one of your competitors, you'd need to provide the vendor with a list of those companies.

- 4) *What is your lead time for recruitment?* Similar to the question about fees, the answer depends on the difficulty of the user profile and how busy they are with other work. But they should be able to tell you how much lead time they like to have for a typical project. Some firms may have the ability to handle emergency requests on much shorter notice, though of course you would avoid this situation if at all possible.
- 5) *Who is responsible for the payments for the users?* Customs vary regarding the appropriate way to compensate users for their time. The market research firm can tell you the going rates in your area (it's often wise to offer a bit more than this), and whether payment is handled with cash at the end of the session or a check to be mailed later. It's not uncommon for users to want a cash payment on the spot, so don't be surprised if the market research firm tells you that this would be your responsibility unless you're renting their facility. If they are paying the users, they may ask for a deposit from you prior to the sessions.
- 6) *How do you handle no-shows?* Good recruiting firms have a lot of practice in getting people to show up as scheduled, but they cannot guarantee full attendance. You should not have to pay for users who don't appear, or who come unreasonably late (and be sure to discuss your tolerance for lateness – some testing schedules are more flexible than others). If your schedule is tight, a firm may use tactics such as overbooking or scheduling make-up sessions. In general, it's best to let them do their job as they see fit, but for important projects it's helpful to strategize together on a contingency plan.

Coordination

When you have found a company you'd like to work with, you should expect to spend some time – especially on your first project – coordinating the following aspects of recruitment:

- 1) *Non-disclosures and other paperwork.* If you're holding the tests at your location, you'll be responsible for providing accurate directions to the test facility. Expect the recruiting firm to take care of the confirmation letter and/or phone call. You may want to request a copy of the letter they send so you'll see exactly what your participants are receiving. It's your responsibility to supply the informed consent and non-disclosure form, if necessary. The recruiting firm should be willing to send these out for you in advance, but don't count on the participants remembering to bring them to the usability test, so keep some spares handy.
- 2) *Frequency of updates.* If the recruiting firm has a “no news is good news” policy and you're expecting daily updates on how many slots are filled, you'll drive each other crazy. Discuss the frequency and manner in which you'd like to be informed of the progress of recruitment. For example, one firm I've worked with e-mails me a spreadsheet about every other day until they've filled the slots, and then they notify me only if something changes.
- 3) *Profiles of participants.* Unless you ask otherwise, the recruiting firm may give you only the name of the person who's scheduled for a particular time. Chances are that you'd like to know more, so ask if you can see the completed screening questionnaires for participants. The recruiting firm should be happy to do this for you, but it's not necessarily something they'll do by default – their other clients may not need as much detail.

The first experience in working with a new user recruitment vendor may also be the most difficult, as you work out the details of the above issues and more. But subsequent projects do become easier, and the time you invest now will pay off in an efficient relationship later, when you can simply pick up the phone and say, “We need 6 Small Business people for next Thursday.”