

User recruitment brief checklist

One of the key ingredients to successful user recruitment and research is to define the recruitment brief effectively. A good brief should be a clear guide that details what is required for the user research/testing sessions, and the vital information that will be useful for anyone involved in the participant recruitment process.

- What are you testing and why?**
- Who are your participants?**
 - Age and gender mix.
 - Desired occupations and/or industries.
 - Any other important demographics relevant for the research.
 - Outline if you want existing customers, or people with specific experience or knowledge of the product, service, website or app at the centre of the study.
 - Technological ability.
 - Relevant habits or behaviours.
 - Information about accessibility requirements, impairments or assistive technology.
- If applicable, what are your recruitment splits?**
- Do you have any screen-out criteria? If yes, provide more detail.**
- Logistical information:**
 - Project lead's details and information about secondary point of contact.
 - Research dates and session times.
 - Length of session.
 - Nature and format of research.
 - Incentive amount, how this will be paid to participants and payment timeframe.
 - Are the sessions remote or face-to-face?
 - If remote, do participants need any specific software to take part?
 - If in-person, confirm the location of the sessions (and if the location is accessible).
 - If in-person, confirm if the participants will be required to show ID before the session.
 - Are there any requirements such as using a specific device or needing to bring their smartphone to the session?
 - Is there any pre-task for participants to do? Or do you require them to complete a tech check?
 - Will the participants be required to share real data during the session (e.g. if testing an online form)?
- Do you plan to distribute consent forms and/or non-disclosure agreements (NDAs)?**
- Is there a possibility for more rounds of research or follow-up activities involving the same participants?**