INTRO TO MARKET RESEARCH
A FIELD GUIDE FOR PRODUCT TEAMS

PART 1:

RECRUITING FOR **B2B MARKET RESEARCH**

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INTRODUCTION

Recruiting research participants is the single biggest challenge in B2B research. The limitations on who you can recruit will define your research strategy, shape what insights you can offer, and ultimately determine whether or not your research will deliver value.

If you know that you want to do market research, but you don’t know where to find the right people and you don't have an in-house research team to help, this is the guide for you.

This guide is based on my experience conducting B2B market research for small and mid-sized companies in the tech industry. It's a (frequently opinionated) attempt at what I I wish I'd had when I started out - straightforward advice from someone who's been there on what to do, how to do it, and how not to screw up too badly.

The first section covers **where** to recruit - leveraging your existing relationships (your community, your customers, etc), using external sources like LinkedIn and Reddit, or throwing wads of cash at vendors.

The second section covers **how** to recruit - how to define your participant profiles, message participants, manage vendors, determine incentives, and - most importantly - how to do it without getting into trouble with your legal team.

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WHERE TO FIND PARTICIPANTS

CHAPTER 1. RECRUITING IN OWNED CHANNELS

The best starting point for B2B research recruitment is often your existing network of customers, followers, subscribers, etc. This group will be the most engaged and easiest to recruit, though they bring with them a substantial risk of an echo chamber if they're the only ones you talk with.

1A. IN YOUR COMMUNITY

Your lowest hanging fruit for soliciting feedback will likely be your existing company communities - any official forums, Discord channels, etc that the company manages. If you have a vibrant community, you can fill some surveys from there, allowing you to turn around some research in days.

Starting recruitment in your community can be as simple as just posting a link to the screener for the survey or interview, with a explanatory note on why you're looking for their feedback.

RECOMMENDATIONS

In order to effectively recruit in your communities:

- **Be an active long-term participant** - it's a lot easier to recruit for projects if you're a known quantity in the community. Participate in the forums even between research projects to build out your profile.
- **Be respectful of their time** - just because your community members are enthusiastic about your product doesn't mean you can ask them to fill out a 30-minute survey. Be succinct and engage them on high-value topics.

- **Reward participation** - even if you don't want to incentivize every community survey with cash rewards, consider if you can offer swag, invites to special community days, chats with the product team, etc. in return for participation. Make it clear that you appreciate their feedback.
- **Track all recruitment initiatives** - if multiple teams want to solicit community feedback, ensure you track and coordinate between them so that you don’t overwhelm the community with feedback requests.
- **Be prepared for criticism** - your community will mostly want to offer product feedback. That’s great for UX research, but community members will frequently complain when you ask business questions. Be prepared for any pricing or business model research to be picked apart and criticized publicly. This doesn’t mean you can’t ask it, but alert your PR team ahead of time and be prepared with messaging around potentially sensitive topics.

"Any business research will be picked apart and criticized by your community"

- **Share back results** - sharing concrete results from your research drives a lot of goodwill and future engagement. A good idea is to run an annual community survey which you can share in full with the community.
- **Recruitment burnout is real** - you want to build a sustainable recruitment cadence in your community that lets you conduct research for years to come. This means not over-sampling your most engaged users. Monitor response rates and pull back if you’re starting to see them dip. I’d be cautious of more than one research request per quarter per community channel.

- **Remember that users are not necessarily decision makers** - your community will primarily be made up of product users. This is ideal for UX researchers but not so much for market researchers. You will mostly want feedback from decision makers, which is frequently not the same people as the users, making your community less fertile ground for market research.
- **Recognize that your community is a self-selected cohort of highly engaged users** - they are not representative of your overall user base, both in terms of positive and negative signals. Don't implicitly trust community feedback more just because it comes from users you might know personally.

1B. LEVERAGE YOUR SALES NETWORK

Your sales team's network is a treasure trove of high-value research participants, though it might be difficult to pry their contact details out of your sales reps' hands. Sales contacts are especially valuable for interviews around purchase behavior, win/loss, churn prevention, price sensitivity and other higher-level topics, as they are the decision makers that you'll be hard pressed to recruit through other channels.

One very valuable segment that is almost exclusively accessible through your sales team is churned customers and 'Closed Lost' prospects. If you're looking to do purchase funnel research, these segments provide incredibly valuable feedback.

RECOMMENDATIONS

In order to effectively recruit research participants through your sales team:

- **Don't mix research and sales** - make clear to your sales reps that your research is not a back channel sales pitch. Nothing makes a customer clam up faster than if they believe their feedback will be used for future sales plays. For the same reason, sales reps should not be on research calls.
- **Consider sales an infrequent recruitment channel** - you can probably only do one or two recruitment initiatives per year through your sales team.

- **Convince your sales reps it's in their interest to help** - you are unlikely to be allowed to do your own outreach to sales contacts - and anyway, you will want warm intros - so it's important to convince your sales reps that it's worth their time to help you despite there not being a direct sales opportunity.

  Some strategies I've seen work:

  - Sales reps often want the chance to engage with clients, to get top of mind. Pitch the research invite as an opportunity for outreach in between sales cycles.
  - Sales leadership loves to use market research output in sales plays. Share research results and solicit research ideas to give them skin in the game. Once you have leadership on board, reps tend to become more helpful.
  - Work with Sales Ops to build a referral program or contest for sales reps, with costs coming out of the research budget. Any internal referral costs will still be cheaper per respondent than external recruiters, so it's worth spending money on sales incentives.
- **Be considerate of your sales reps** - it's their contacts and livelihood that you are impacting.
  - Ensure your outreach is not overlapping with active deals or sales cycles.
  - If the rep says no to contacting a candidate, mark them as off limits.
  - Make it clear to the sales rep ahead of time if the customer's purchase process experience will be part of the conversation.
  - Confirm with your sales reps if you can follow up with past research participants yourself for future projects, or if you should always go through the reps.

- **Expect sales reps to be flaky** - even with the best intentions, sales follow-through on outreach plans tends to be spotty. Reps will naturally focus on work that offers immediate revenue potential, so even if you have sales leadership backing, expect most reps to invest limited time into your project.
- **Be organized before contacting sales** - once your sales team starts lining up high-value research participants, have your scheduling set up, interview guide finalized and signed off, and internal participants vetted. Sales leads are rare and valuable, make sure not to waste them.
- **Surveys are not a good use of sales networks** - I have never seen sales recruitment work successfully at the scale of a survey. Focus on using it for qualitative research.

> *"Nothing makes a customer clam up faster than if they believe their feedback will be used for future sales plays"*

1C. USE YOUR NEWSLETTERS

Another straightforward recruitment channel is your company newsletters and other marketing emails. Newsletters are especially good for surveys, if you can embed the research invite as part of the newsletter, as this tends to lead to higher open rates than sending out standalone survey emails.

RECOMMENDATIONS

Best practices for recruiting through owned email lists:

- **Segment your email subscriber lists**
    - Send your research emails to the smallest cohort possible each time. The smaller fraction of your newsletter list you can target with each research project, the larger number of different projects you can run before you encounter survey fatigue.
    - Work with your product marketing team to identify relevant targeting criteria, and add those as flags in your newsletter distribution software. It's super helpful to e.g. know which newsletter subscribers use which of your products, so you can target only those with your invites. This can be challenging to implement, but it is powerful once available.
- **Embed user ID metadata in survey url** - avoid the need to ask newsletter respondents for their name or email by embedding their user ID as metadata and capturing it in the survey software.

- **Avoid research fatigue** - it's easy to over-sample newsletter subscribers. Avoid emailing any one subscriber more than once per quarter, and make use of segmentation to allow for more projects.
- **Decide if you want to let newsletter subscribers forward the survey link** - letting newsletter subscribers repost survey URL's on their social media can be very useful as a signal boost, but it can also drive lower-quality respondents.
- **Allow people to unsubscribe specifically from research email** - if you send out separate research emails (as opposed to including a research invite in a marketing email), it should be possible to unsubscribe specifically from these emails while remaining subscribed to general marketing emails. Make sure you know how to use the right suppression lists when sending out emails, so you adhere to opt-out preferences.

> *"B2B newsletters tend to have low open and click-thru rates. Expect successful recruitment in the 2-5% range"*

- **Expect low response rates** - B2B newsletters tend to have low open and click-thru rates, so even large contact lists might not translate to massive survey completion rates. Don't be surprised by survey completion rates in the 2-5% range.
- **Newsletter subscribers are atypical** - Users who opt in to receive B2B marketing newsletters are not representative of your overall customer base. They actually want to be spammed with marketing pitches, which is pretty weird.

- **Email addresses are sensitive information** - be cautious about exporting subscriber emails anywhere from your marketing automation platform (e.g. by importing emails into Excel to manually match with user behavioral data to create target lists. This can be very powerful, but your legal team will be unhappy). Don’t send email addresses in plain text to your survey platform; hash them or use an anonymized user ID string as the unique identifier.
- **Start the survey in the email itself** - experiment with embedding the first question of the survey directly in the newsletter.
- **Understand who you are legally allowed to target** - market research invitations are classified as 'promotional emails' (as opposed to 'operational' emails that goes out to all customers, such as purchase receipts or updates on your most recent data breach). If a customer has opted out of receiving promotional emails, you need to exclude them from the distribution list, though sometimes you can append e.g. a short satisfaction survey to an operational email if the survey is directly related to the email topic (e.g. asking about satisfaction with a purchase process in the receipt email). Confirm with your legal team what you're allowed to do, and any loopholes they will allow you to exploit.

1D. CUSTOMER SUPPORT & CUSTOMER SUCCESS

Your customer support and CSM teams have a lot of interactions with your customers, and tend to have a great finger on the pulse of customer sentiment. A good first step in a lot of research is to gather internal feedback from your CS and CSM team before you talk with customers, to ensure you capture existing internal knowledge in your research plans.

Your support and CSM teams can also often offer warm intros to customers. Recruiting through these teams tends to work best when the research objectives match their most frequent types of customer interactions.

- When doing research around product quality and functionality, the customer support team can often connect you to a lot of informed users. The CS team is less useful for e.g. business-related topics.
- Your CSM team can be a great source of feedback on early customer experiences, such as onboarding, customer needs, product roadmap, etc. If your projects touches on anything that's related to the CSM team's core objective of 'making our customers more successful', ask for their help to intro you to their customers.

1E. OWNED SOCIAL MEDIA

B2B brands tend to not have a very active social media presence, but if you're the exception, it can be worth tapping into this community for feedback. It's easy to repurpose your forum recruitment messaging and post it on social media, so the marginal cost is near zero.

RECOMMENDATIONS

- **Expect to be disappointed** - I haven't found social media to be very successful for market research recruitment. Engagement tends to be limited, the signal-to-noise ratio is low, and there is a risk that any controversial business questions (e.g. around price elasticity or product bundling) will generate a negative PR cycle. Go ahead and try it, but only if the time investment is minimal.
- **Social media works best for surveys** - I'd be wary of trying to recruit for qualitative research, such as interviews, through social media, due to your lack of control over who sees your invite.
- **Quarantine social media responses** - ensure you can differentiate between recruitment sources in your survey software, as you will want to do a more comprehensive quality control pass on any feedback you receive via social media.
- **Social media followers are atypical** - people who follow your company on social media are not representative of your overall user base (they're weird, just like your community and newsletter subscribers, but in yet another way…)

1F. INTERCOM, WEB & IN-APP INTERCEPTS

Running surveys through a web intercept can be very effective for fast-turnaround research projects, though feedback quality will be lower than through more selective channels.

Almost all survey software have a web intercept module and most A/B testing solutions has functionality to run simple surveys. And if your website uses a tag manager, implementation can be done easily without requiring engineering resources. Web intercept surveys are especially useful for simple brand-related surveys (e.g. message testing, brand sentiment, etc) where respondent quality isn’t super important.

Intercom and in-app intercepts offer more control over who sees your survey, but integration is more complicated and usually requires approval by your product team. And interrupting a user's workflow with a survey can become very controversial if you don't do it respectfully, so be careful about the UX.

Still, Intercom and in-app intercepts can be a good channel for NPS or CSAT surveys, standardized surveys that repeat on a regular basis.

1G. RESEARCH PANEL & CUSTOMER ADVISORY BOARD

The gold standard for research recruiting is an in-house research panel or customer advisory board, giving you a pre-vetted panel of candidates who offer turnkey access to high-quality research participants.

If you're reading this guide, I expect that you don't yet have one set up, but I'd encourage you to start thinking about creating a research panel in the future. It's one of the best long-term investments you can make for effectively gathering feedback, across both UX and market research.

Developing and maintaining an in-house research panel is a significant investment of bandwidth and budget, but a start is to build out a participant list for your completed qualitative research projects, in which you track past research participants, with profile data, research projects participated in, quality of feedback offered, and interest in participating in future research.

"The gold standard for research recruiting is an in-house research panel"

TL;DR - RECRUITING IN OWNED CHANNELS

Chapter 1 covers where you can recruit research participants using your owned networks. This is usually the best starting point for many research projects, though you need to be careful of the echo chamber effect in any conversations with your existing customer base.

Common owned channels to use for recruitment:

- **Your forums**
  - **Pros**: Easy access; knowledgeable respondents
  - **Cons**: Your forum community is a non-representative sample of your customers; more suitable for UX than market research
- **Sales network**
  - **Pros**: Access to high-value business decision makers
  - **Cons**: Requires your sales team to act as intermediaries
- **Newsletters**
  - **Pros**: Can be large scale; best owned channel for surveys
  - **Cons**: Non-representative sample; low response rates
- **Support & CSM**
  - **Pros**: High quality participants; warm intros
  - **Cons**: Low volume; more suitable for UX than market research
- **Owned social media**
  - **Pros**: Easy access, low marginal cost to experiment
  - **Cons**: Rarely scalable for B2B brands; low-quality sample
- **Intercom, web & in-app intercepts**
  - **Pros**: Good for short standardized surveys (e.g. NPS/CSAT)
  - **Cons**: Requires product team sign-off; disruptive of user flow
- **Research panel & CAB**
  - **Pros**: Magical; life-changing; gold standard for recruiting
  - **Cons**: Time consuming and costly to stand up and maintain

CHAPTER 2. EXTERNAL CHANNEL RECRUITMENT

Recruiting research participants from outside of your own network can be challenging, but there is a lot you can do without having to go to a third party vendor for leads.

I'm of the opinion that you should aim to recruit at least some share of your research participants outside of your own network for most projects, both in order to achieve expanded reach as well as to get a greater diversity of viewpoints. The latter is key if you look to understand the needs and perspective of new customers or do competitive analysis.

The cost of recruitment in terms of time and budget rises substantially when you use external channels. There are pros and cons in doing recruitment yourself vs hiring a vendor to do it, but even if you plan to use vendors, I'd encourage you to experiment with the below channels yourself (and vice versa, you should experiment with using third party recruitment vendors even if you plan to do most recruitment in-house).

The following section covers the most common external recruitment channels, with considerations for each.

> *"Including participants outside of your own network is key for a greater diversity of viewpoints"*

2A. LINKEDIN

If you spend any time on LinkedIn, you have likely been contacted by a research recruiter. Many recruiters use LinkedIn as their primary sourcing channel. You can pretty easily do this yourself, though be prepared to spend a lot of time per completed recruit.

LinkedIn is one of the best channels for recruiting participants for business-related projects (e.g. business models, price elasticity, sales process, etc). As a space for business networking, respondents tend to be very open to discussing commercial topics.

I've found LinkedIn to work fairly well for recruiting for interviews, though the labor cost in terms of researcher time spent doing in-house LinkedIn recruitment can be pretty high. I've never tried using LinkedIn for surveys, as the total cost per complete (incentives + recruiter time) will be prohibitive for all but the most high-value survey work.

RECOMMENDATIONS

- **Make sure your LinkedIn profile is up to date** - have a professional-looking profile, keep your employer info current, and ensure that your job title matches what's in your message.
- **Sign up for LinkedIn Sales Navigator** - Sales Navigator is an invaluable tool if you want to do any serious LinkedIn recruitment. It allows you to segment and identify the right target profiles, and it gives you more InMail messages. $100/month and well worth it.
- **Specify that you're a company employee** - people are more likely to respond to a named company employee than to a third-party recruiter.
- **Be selective in who you contact** - there's a limit to the monthly number of InMails you can send, so don't spam every profile that looks appropriate. Focus on high-quality candidates.

2B. REDDIT & THIRD-PARTY FORUMS

I have had decent success recruiting participants through Reddit. If you have a subreddit dedicated to your product (e.g. /r/unity3d) or to the general topic (e.g. /r/gamedev), there are a large number of knowledgeable enthusiasts, many of whom are professionals, available to tap into. The same goes if there are independent subject matter forums or Discord channels dedicated to your industry.

It’s important to remember that these spaces are intended for enthusiasts to connect and exchange ideas, so just because you are from a company that they’re discussing, that doesn’t necessarily make you welcome in the space.

RECOMMENDATIONS

- **Create a company account for the recruitment post** - don’t post from your individual account. If possible, the account should be ‘official’ and verifiably linked to your company in some way.
- **Ask for permission to post** - contact the subreddit/forum mods before posting any feedback requests.
- **Make it clear you’re only looking for feedback** - be explicit in your messages to the mods and in your post that you’re only seeking feedback, and there is no sales or marketing component. Trying to promote your product in a forum is a quick way to get banned.
- **Experiment with promoted posts** (?) - I’ve never tried using promoted Reddit posts, but I expect it might work pretty well, and it’s definitely worth a try.

2C. SOCIAL MEDIA ADVERTISING

Social media ads are a really effective channel in recruiting for consumer surveys. I haven't found it as useful for B2B surveys, but I believe that it should be feasible for certain industries, so I'd suggest it can be worth trying. Most social media ad platforms are self-service and have pretty low ad CPM's, so you can experiment quickly and cheaply and see if this is a channel that makes sense for you.

If your company is already running social media ads, connect with your marketing team and see if they can help you run an experiment. You will likely have to contribute the budget, but it should be less than $500 to test it out.

I've found Facebook Ads to work best, with Twitter seeing very poor click-throughs on survey links, and I wouldn't think it's even worth trying more image-focused networks like Instagram, Snapchat or TikTok.

2D. REFERRALS

Referrals from research participants can be a very powerful recruitment mechanism, and they also often let you to expand your target personas to new market segments that you hadn’t considered in your own initial plans (e.g. if your participant says 'oh yeah, my friend, who works in industry XYZ, would also be really interested in your product, let me connect you with her').

When conducting interviews, always include a section at the end of the interview where you ask the respondent:

- If they can think of anyone in their network that you should speak with, and if they can put you in touch with them.
- If there are other roles or personas that they think you should interview, and why they believe it would be valuable for you to speak with them.

2E. TRADE SHOWS & CONFERENCES

If your company is attending industry trade shows and conferences and has a booth on the show floor, this is a great way to do short (1-3m duration) intercept interviews of people who walk past your booth, as well as recruiting for a research panel. Don't expect to be able to do any in-depth research at these events, but if you can figure out how to make use of these short-form interviews, you can gather a lot of data quickly and cheaply.

If you have the luxury of a conference organized by your company (e.g. Dreamforce, WWDC, etc), this is a fantastic opportunity to conduct more serious research. Ideally get yourself a dedicated meeting room to conduct interviews and focus groups, and you will want to get early access to the participant list and send out invites before the conference starts.

Third-party conferences where you don't have show floor presence are more challenging. You are unlikely to have access to the participant list, and there is no captive audience that you can recruit from. You might still end up with some useful ad-hoc conversations through networking and socializing, but don't expect to be able to do much formal research.

2F. TRADE ASSOCIATIONS & INDUSTRY NETWORKS

Some industries have trade associations or other industry networks that connect companies in their sector. If your industry has that type of formal business networks, it can be worth contacting these organizations and inquire about the opportunity to connect to their members. This is not a channel I have had much success with myself, but it can be worth looking into.

TL;DR - RECRUITING THROUGH EXTERNAL CHANNELS

Chapter 2 covers direct external recruitment - how and where to recruit candidates outside of your existing network. You should aim to recruit at least some of your research participants outside of your own network, in order to expand your reach as and get a greater diversity of viewpoints.

Common external recruitment channels to tap into are:

- **LinkedIn**
  - **Pros**: Access to high-quality business contacts
  - **Cons**: Time consuming; high cost per recruit
- **Reddit & third-party forums**
  - **Pros**: Can provide access to product enthusiasts at scale
  - **Cons**: Requires an active enthusiast community
- **Social media ads**
  - **Pros**: Easy; cheap to experiment
  - **Cons**: More useful for consumer than for B2B research
- **Referrals**
  - **Pros**: Allows you to leverage your respondents' networks
  - **Cons**: It's rare to get a large numbers of referrals
- **Trade shows**
  - **Pros**: Piggyback off existing company marketing investments
  - **Cons**: Bad for in-depth feedback collection
- **Trade associations**
  - **Pros**: Offers a large network of industry contacts if you can tap into it
  - **Cons**: Only relevant to a handful of industries

CHAPTER 3. USING THIRD PARTY VENDORS

There is a vast ecosystem of vendors aimed at solving research recruitment for their clients. Many larger companies tend to outsource most if not all their recruitment to outside vendors.

If you have the budget, I definitely recommend outsourcing at least some recruitment. While there is an initial time investment in finding the right vendors, it's worth building out a stable of trusted relationships in order to speed up recruitment for future projects, and to diversify your participant pool.

There are several benefits in using third party services that you don't get in-house:

- **Recruitment speed** - once you have trusted vendors set up in your system, you can often turn around a research project quickly by tapping into their networks. For example, a self-service qual panel can let you start running subject matter expert interviews in a matter of hours.
- **Expertise** - a good recruitment vendor will add value by proposing recruitment strategies, providing feedback on targeting criteria, or offer other recommendations for your project. They have done this a lot, and the best vendors function as partners to help you succeed.
- **Lower total cost** - when taking into account the very real cost of your staff's time, it can often be more cost-effective to outsource low value-add work like recruitment. That's definitely not always the case, but make sure you don't value internal time spent at $0.

- **More internal bandwidth** - recruitment can be massively time intensive, and internal staff time can be spent much more productively than on endless recruitment and scheduling. If recruitment becomes a blocker, you'll end up doing a lot less of it compared with just throwing a bit of money at a vendor.
- **Reach** - especially for surveys, there is often no alternative to third party panels if you want to get a sufficient number of responses.
- **Reduced bias** - third party recruiters can give you more unbiased respondents than in-house recruitment. So even if you are able to recruit all participants internally, it might be worth allocating some of your sample to a third party recruiter to validate the feedback you receive from internally sourced participants.

> *"Make sure you don't value internal time spent at $0"*

- **(Partial) anonymity** - an external recruiter can hide who is requesting the feedback, and allow for more unbiased responses. You won't be able to conduct fully anonymous research if you're doing the actual interviews or survey yourself, but an external recruiter allows for a larger degree of anonymity.
- **Outsource the least fun parts of the job** - anyone who's tried to e.g. organize a focus group knows that getting all participants to show up on time (or at all) can be painful. Offloading scheduling, candidate tracking, and appointment confirmation will reduce the overhead for doing research and make it more likely that your company makes research a priority.

3A. THIRD PARTY RESEARCH PANELS

There are a gazillion online research panels with lists of opted-in survey respondents, segmented by pre-existing demographic and firmographic information on which you can target. Though most panels have limited B2B samples, so you are still likely run into recruitment challenges if you're looking for narrower targets.

For B2B, I've had success with panel aggregators who allow you to source across multiple independent panels, as they tend to be able to fill larger B2B samples (with the downside that their panel quality is more mixed than the best proprietary panels). Two such aggregators:

- Cint/Lucid
- Dynata/ResearchNow

There are also a bunch of proprietary panels managed by research agencies that are not part of the aggregation services. Most of these vendors claim to have unique strengths in participant quality or reach in certain sectors, though I haven't found a great proprietary B2B panel yet (that's not to say they don't exist for your industry). Proprietary panels tend to be more expensive than aggregators.

Expect to pay $20+ per complete for a B2B complete through an aggregator, depending on survey length and difficulty of recruitment.

There are also some self-service panels where you can field your own surveys. These are rarely useful for B2B surveys, but they are cheap and allow for gradual fielding, so give them a spin if you want to experiment. I've used the following for B2C research:

- SurveyMonkey
- Qualtrics (accessible to Qualtrics subscribers)

3B. RESEARCH RECRUITERS

There are also a ton of vendors who offer help with recruiting research participants through in-house contact lists, social media networks and LinkedIn. Most traditional full-service research agencies offer research recruitment as a service, as well as a lot of smaller specialized vendors. Though many vendors decline to bid for B2B projects, so the market for B2B services is smaller than for B2C.

There's a lot of good vendors in this space - below are two recruiters I've had positive experience with and can recommend, but this is by no means an exhaustive list:

- Zintro - qual-only recruitment vendor. Relatively low-cost and good at recruiting challenging B2B samples. They're a fairly small team and offer a lot of personal attention to each project.
- NewtonX - qual and quant recruitment vendor with broad coverage of B2B industries.

You can expect to pay anywhere from $600 to $1,200 per completed interview, depending on participant seniority and difficulty to recruit. There's frequently a contractual minimum (e.g. 5 completes), with discounts for large recruits.

I have never used quantitative research recruiters, who specialize in sourcing survey participants through e.g. LinkedIn. Non-panel survey recruitment is expensive, and will likely cost you $70+ per completed survey response, so I'd suggest you repurpose your research objectives to fit a qual format if at all possible.

3C. SELF-SERVICE QUAL PANELS

There is a set of new vendors that attempt to replicate the self-service survey panel model for qualitative research recruitment, allowing you to set up a project and start recruiting for interviews without going through a full RFP process. There are several but I've used:

- UserInterviews
- Respondent.io

I've had a good experience with, and can recommend, both companies. Both have limited B2B samples, so if you're looking for a niche audience, you're unlikely to be able to fill a complete study (Respondent.io currently has a larger B2B sample than UserInterviews, but that can change over time). But they're cheap and low-risk, as you only pay for completed interviews, so I'd encourage you try them out.

Both companies work on an "participant incentive + 50% fee" pricing model, so if you offer e.g. $100 incentive to participants, you'll pay $150 in total.

3D. EXPERT NETWORKS

Traditional expert networks such as GLG and Guidepoint offers access to subject matter experts in pretty much any field, but unless you're a hedge fund, you probably don't want to pay $1,500 per interview, so these companies tend to be not very useful for day-to-day research (there might be cheaper expert networks that I haven't encountered).

But if a topic is of burning interest, and you have the budget, expert networks are a great way to get access to senior decision makers.

3E. CONSIDERATIONS IN THIRD PARTY RECRUITING

- **Expect vendors to over-promise and underdeliver** - the only difference is to what degree they do it.
- **When recruiting through a vendor, don't hesitate to reject candidates that don't match your profile** - inform the recruiters of the reasons why you're rejecting the candidates, so they can fine tune their criteria.
- **Always recruit in waves** - start with 10% of your target, review screeners and completes for quality, make adjustments, recruit another wave until you're happy with the quality.
- **Every panel struggles with participant quality** - create a strong screener, build in multiple validation questions, and be ruthless about weeding out fake responses. Even with a great screener that excludes obvious spam, you will still discover that a lot of open-end responses don't make sense in context. Remove these respondents fully, as all their other responses is suspect.
    - Self-service survey panels have even more quality issues, so be extra selective. Expect 30-50% false responses.
- **Be aware of PII challenges** - there's a minefield of legal and PII (Personally Identifiable Information) risks when using 3rd party recruiters. Make your legal team your best friend.
    - Be very careful about providing access to your customers' PII, such as emails, to third parties. Never give over PII without legal sign-off.
    - Make sure that the vendor is contractually responsible for managing their candidates' PII. Vendors will often attempt to assign contractual PII liability onto you, which can be a blocker in contract negotiations. Ensure your legal team is looped in and signs off on any PII clauses.
    - Make sure any self-service platforms' legal terms are signed off by your legal team before using them.

3F. INTERNATIONAL RECRUITMENT

Ideally, you will want local input from every market you operate in, and not assume that US feedback is representative for all customers. But international research adds significant levels of complexity, which is often not feasible within the budget and timeframe of your project.

If you are a US company that want to start dipping your toes in international market research, I suggest starting with English-language recruitments in your biggest markets. Many of your international customers can likely offer feedback in English, allowing you to sidestep the issue of localization. International recruitment for English-language projects looks pretty similar to US recruitment, with some important restrictions around about PII (e.g. GDPR creates specific requirements for how PII is to be handled in the EU) and incentives (what is legal in terms of e.g. sweepstakes, tax implications of incentives, etc.), where you'll want to loop in your legal team.

Full-scale multilingual research projects are a lot more complicated, and I wouldn't suggest you attempt one by yourself. If you want to do multilingual research, use a global research agency and prepare for a painful budget discussion with your manager. Most larger agencies can do research in the Americas and Europe, while finding a good APAC vendor can be a bit more challenging (and good luck finding a vendor that gives you quality results in China). I don't have specific recommendations, but I've worked with Kantar, Gfk, and Ipsos who all offer solid (and expensive) global services.

TL;DR - THIRD PARTY RECRUITMENT

If you have the budget, I definitely recommend outsourcing at least some recruitment to third-party vendors. Frequently it's the only solution to getting the scale of participants that you need, but even if you can do recruitment in-house, using some external vendors is frequently good for diversification.

The benefits of using a good recruitment agency includes faster recruitment speed, access to the vendors expertise, and frequently lower total costs than in-house recruitment once you include the true cost of in-house labor.

Types of vendors discussed in this chapter :

- **Survey panels** - vendors focused on supplying panels of pre-vetted participants for surveys. Frequently the only option for quantitative research, but panel quality tends to be a significant challenge.
- **Research recruiters** - helps find and vet interview participants. Can be expensive, but the best qual recruiters lets you do research that you simply couldn't do otherwise.
- **Self-service qual panels** - a new set of vendors that try to offer the accessibility of survey panels for the use in qualitative research. Has promise but currently limited B2B sample.
- **Expert networks** - expensive recruiters for hard-to-find participants like c-suite staff. If you have the (large sums of) money, they can source almost any profile.

Chapter 3 also covered considerations for working with third party vendors, and thoughts on running multilingual research projects.

SECTION II:

HOW TO RECRUIT EFFECTIVELY

CHAPTER 4. PROCESS BEST PRACTICES

This section covers practical questions on getting started with research recruitment, on topics such as defining your participant profiles, writing your messaging, managing vendors, research operations, etc.

4A. DEFINING RESEARCH PARTICIPANT PROFILES

A key early decision in your research will be what type of respondents to include in your study. Even if you decide to recruit only from within your current customer base, you will want a point of view on who you want to speak with and why their feedback will be relevant to your research.

PRIMARY TARGET AUDIENCE

Some of the key profile criteria you want defined are:

- **Business relationship** - do you want current customers, prospects, churned customers, lost prospects, customers of competitor products, etc.
- **Product experience** - should they be active users of your or competitor products, market newcomers, etc.
- **Decision making responsibilities** - do you want to speak with buyers of your or competitor products, people with influence on purchase decisions, or gatekeepers from a budget, legal or management perspective, etc.
- **Company size** - are you looking for feedback from SME customers, enterprise accounts, etc.

* **Job titles** - a list of target job titles is especially helpful when recruiting outside of your network through vendors or on LinkedIn.
* **Industry** - target industry is another of the key filter criteria for recruitment through third party channels.

If you're doing qualitative research, you'll want to ensure you have enough of a sample from each segment that individual outliers don't skew the analysis. A good rule of thumb is to assume that you need a minimum of five interviews per segment. If those initial five interviews are incredibly consistent, you might be satisfied with that, but more often you will have to add interviews until you have a more complete picture. This means some segments will require more interviews than others, depending on how diverse the segments end up being.

For quantitative research, I never want to have less than 100 high-quality completed survey responses per segment, and preferably more than 300 responses per segment, as you'll want to be able to cut the data in more ways during your analysis.

EXPANDED TARGET AUDIENCE

You also want to consider how you can use partial-fit candidates, where the respondents fit some but not all of your recruiting criteria. In B2B recruiting, you rarely have the luxury of choice, and you have to make do with what respondents you can find, even if they're not ideal.

It helps to determine early what type of partial-fit candidates you can use, so you can expand your recruitment pool from the start rather than having to to refit your screener halfway through your project.

Partial-fit participants are most useful for 1:1 interviews. In focus groups you need people with proper understanding of the subject for useful conversations, and in surveys you'll never know how much they actually know and how much is bullshit.

4B. EFFECTIVE INVITATIONS

Persuading potential research participants to help offering you feedback can be challenging. Recruiting often consists of a cold outreach through email, IM, or forum post, and getting this right will significantly improve response rates.

Your initial outreach message has three key objectives :

- **Reassure potential candidates** - people always distrust cold outreach messages, especially from outside their network. Your message needs to overcome their skepticism about you and the project in order to avoid the spam folder.
- **Educate them about the project** - make it clear what you are contacting them about, and why they would be a fit.
- **Make them desire to participate** - you can do this by creating curiosity, selling them on the value their feedback would bring, or just by focusing on the money.

RECOMMENDATIONS

How you communicate with potential participants will vary depending on what you're recruiting for, and the channels you use, but here are some universal considerations.

- Reassuring potential candidates:
    - **Be personable** - in B2B outreach, I've found success with messages where it's clear there's a specific person asking for their time. This is different from B2C messaging that is often written in a company voice.

- **Emphasize that it is not a sales call** - be very clear that it is a feedback-only call, with no sales pressure involved. This is especially relevant when you talk with non-customers (lost opportunities, churned customers, prospects); they will be much less open to sharing their feedback if they believe it will provide grist for your sales team's next initiative.
- **Use an individual email address** - an email from 'Jane@company.com', who has an authentic LinkedIn profile, is much more credible than a message from "no-reply@company.com".
- **Add a LinkedIn link** - include an email footer with your title and a LinkedIn link that verifies your identity.
- **Mention if you're the primary interviewer** - in qual research, if you're running the actual interviews, mention this. "This is who I am and why I'd like to speak with you" is a much more compelling story than "someone at the company wants your time".

"People will be much less open to sharing feedback if they believe it will provide grist for your sales team's next initiative"

- Educating & making them want to participate:
    - **Share research objectives** - explain why their feedback matters. Sometimes money is all a candidate cares about, but people often respond because they genuinely want to help improve your product. Sharing objectives can also help respondents direct you to a colleague who may be a better fit.
        - Be concrete when sharing objectives. Generic phrases like “help me help you better” should be avoided at all costs.
    - **Be succinct** - shorter messages have more chance of being read (though don’t be so brief that you don’t tell them why they should care). Review your initial draft and cut it down by 1/3.
    - **Don’t over-promise** - make it clear that they haven't been accepted into the study just because you're reaching out, as most often, you will want to screen them before actually accepting them. If you’re posting on a forum, highlight profile requirements in the post to avoid ineligible respondents wasting their time filling out the screener.
    - **Outline the time commitment** - make it clear if you’re looking for a 45 minute interview, or a five minute survey, etc.
    - **Mention deadlines** - if you have surveys that close on a specific date, mention this in the invite.
    - **Confirm incentives** - share how they will be compensated for participation, and in what format (gift cards, discounts, etc).

- Other recommendations:
  - **Track response & completion rates by channel** - once you've done a couple of projects, you'll know what channels work best for you and approximately how many candidates you need to reach out to in order to hit your research targets.
  - **A/B test everything** - in formats where you can stagger invites (e.g. emails, LinkedIn messages), A/B test subject lines, copy, incentive levels, how you describe the incentives, etc. Over time, you'll develop your own best practices.
  - **Include a clear CTA** - make it clear what you want them to do next. Adding a link to book a call, or embedding the first question of the screener in the email, will significantly increase response rates.
  - **Consider time of week and day for your posts** - I find mid-week (Tue to Thu), and mid-morning (9-12) for your largest audience segment, to work best for emails.
  - **Follow up on emails exactly once** - if you're doing email invites, send a follow-up note with a tweaked subject line 3-5 days later. Don't keep spamming.
  - **Let respondents determine interview time** - the more flexibility you can give respondents, the more luck you'll have in recruitment. Offer generous time windows for interviews and give them a tool like Calendly to book their own time.
  - **Mail merge is your friend** - if you're sending out a bunch of near-identical emails, invest in setting up a mail merge tool that let you batch send emails to contact lists while changing some parts of them. This will be a massive time saver.

- **Subject lines are tricky** - there's a lot that goes into email subject lines, but I don't have a ton of detailed best practice advice on this front. My suggestion is to do a lot of A/B testing to see what works best for your audience.
  - A Stripo blog post has examples of survey subject lines here. You might note that these "best practices" are all over the place, so I'm not sure anyone knows what's actually best.

EMAIL COPY TEMPLATES

There's a lot of research invite email template examples online, so I'm just going to link to some. Though note that some of the B2C survey email templates are not suitable for B2B audiences as they're trying to tap into an emotional relationship that your B2B customers are unlikely to have with your brand. In B2B, I suggest to be less colorful and more straightforward and transactional in tone.

Some survey email template blog posts for ideas:

- QuestionPro blog
- Stripo blog
- EmbedSocial blog
- ProductPlan blog

4C. CONTACTING VENDORS

When you decide to use a research vendor for recruitment, your first step will often be to submit a Request for Quote, asking the vendor if they can fill your required sample and at what cost (since you're just buying sample, no need for a more complex RFP).

In your email to the vendor, it helps to include:

- Project outline and objectives.
- Planned methodology (survey, interviews, focus groups, etc).
- Target number of participants, split by quotas (i.e. you're looking for 300 survey respondents, of which 200 are individual contributors and 100 are managers).
- Length of participation (10m survey, 45m Zoom interviews, etc).
- Geographies or markets.
- Details of your target segments, ideally with some example LinkedIn profiles (if you're using a qual recruiter).
- Expected vendor deliverables (e.g. just access to participants, survey fielding or interview moderation, video and transcript, etc).
- For qual projects, ask about policy for follow-up interviews with participants. Will you be able to book follow-up interviews yourself (probably not), is there a discount to the recruitment fee for follow-ups (there should be), etc.
- Preferred timeline for recruitment.

4D. INCENTIVES

Most times you will want to offer incentives to research participants to compensate them for their time, with some exceptions for e.g. a super short two-question satisfaction survey.

Deciding on type and level of incentive can be challenging, though it gets easier as you do more projects. Here are some suggestions for how to approach managing incentives.

- **Offer incentives** - sometimes I hear teams not wanting to offer incentive because they believe it skews the feedback or that they can get by without it. Most times this is misguided - it's the feedback from non-incentivized respondents that you should be the most wary of (who would spend time offering a for-profit company in-depth quality feedback for free?). Offering incentives aligns your objectives with that of your participants.
- **Don't focus too much on minimizing incentive levels** - incentives are a visible up-front cost, so there's always pressure to find the lowest viable level. But often it pays to spend a bit more for faster recruitment and higher quality participants (see point above). If it takes a staff member an extra twenty hours to complete recruitment, it probably costs the company more than increasing your participant incentives by $50.
- **Use incentives that are valuable to your target segment** - gift cards are almost always the easiest option, but if your target is customers, product discounts, conference tickets, or swag can be equally impactful and cheaper.
    - Though be mindful of tax implications of product discounts. And remember that B2B company swag is rarely very interesting, unless you have a really sexy brand.

- **Decide on guaranteed incentives vs sweepstakes** - always use guaranteed incentives for qualitative research, but for surveys it is often more impactful to offer e.g. a sweepstakes with the chance to win one of five $250 gift cards than a guaranteed payout of $10. Plus sweepstakes are a lot easier to manage than distributing small incentives to a lot of respondents.
  - Enlist your legal team to draft your sweepstakes rules, and exclude regions with complicated sweepstakes laws (e.g. nordic countries, Montreal, etc).
- **Use a gift card management service** - I've found Tremendous to be very useful. Tango is another good option. It's a lot faster and easier to use a management service than to distribute cards yourself, and at a relatively minor extra fee. It also saves you a lot of time on the back end when it comes to expense reporting.

> *"There's a lot of legal complexity involved in managing incentives. Involve your legal team early"*

- **Involve legal early** - there's a lot of legal complexity involved in incentives. Sweepstakes rules can be a nightmare, with different regulations for different regions. Paying people for services rendered can involve tax implications. Different legal teams treat these questions with different levels of rigor, but this is definitely an area where it's better to ask for permission than forgiveness (the same goes for managing customer PII).

- **Decide if you will prorate incentives by time spent** - I usually offer a fixed-level compensation (e.g. $300 for a 45m interview), but expert networks usually offer prorated rates (e.g. $400 per full hour; if the interview lasts 45m, they pay out $300, if it lasts 30m they pay $200). I think this adds unnecessary complexity, though the benefit is that you can offer higher nominal incentive levels.
- **Work backwards from your candidate pool** - consider the size and composition of your target audience, and decide on incentive levels based on what percentage you need to convert.
    - A smaller potential participant pool requires a higher incentive level (e.g. if you need more than 5% of potential participants to respond to your survey, you will need to offer a larger incentive).
    - More senior participants require higher incentive levels (e.g. a C-suite exec won’t find a $100 gift card worth their time. Senior managers tend to start at 150% of base, with c-suite 200%-300% of base).
    - Research projects with an ‘exciting’ story can offer smaller incentives (e.g. a tiny startup with a cool product asking for input on their product roadmap might be able to offer only a nominal amount, while an established company asking about brand values will have to fully compensate participants for their time).
- **Consider using research results as incentives** - sometimes you can offer to share the survey results with participants as the incentive to participate. However, this locks you in to not being able to share the results to non-participants, meaning your content marketing team can't use the results.

- **Track how much you've paid each participant** - in the US, if you're paying a participant more than $600 per year, you need to report it as 1099 income to the IRS.
- **Experiment** - don't hesitate to tweak incentive levels mid-recruitment if you don't get the response rates you want. Use a soft launch to A/B test messaging and incentive levels.
  - You don't need to offer the same incentives in all channels (i.e. you can offer lower levels to your own community and higher on LinkedIn), but make sure your community can't compare side-by-side (e.g. don't offer $25 incentives in your own forums and $75 on Reddit).

INCENTIVE AMOUNTS

Exact incentive levels are industry- and product-dependent, but some broad levels for tech industry B2B interviews that I've found success with:

- 1:1 interviews or focus groups: $50 to $400 per hour, with common levels around $150 to $250.
  - A GreatQuestion blog post suggests $1.50/minute for B2B respondents with an additional $1 for executive roles, corresponding $90 to 150 per hour.
  - UserInterviews' incentive calculator suggests $85/hr for a B2B online interview.
  - Ethn.io's incentive calculator suggests $150/hr for a B2B online interview targeting engineers.
- 10 minute online survey: Sweepstakes for 1 of 5 $250 gift cards, or $20+ per survey completion. Expect to pay a lot more for high-value targets, to the range of $100+ for execs (though at that point, I'd argue you're using the wrong methodology).

Generally, I find the online incentive calculators linked above to lowball the required levels. Vendors always want to make research seem cheap, and their recommendations often results in very junior B2B recruits.

When I've working with third party recruitment vendors for my own projects, I frequently pay $250-$350 for 45m interviews (plus vendor fee), and in expert networks, I see incentives of $300-$400 per hour as a mid-senior tech employee. Don't hesitate to experiment with lower levels, but I'd be cautious believing the lower ranges offered by these calculators.

4E. SCREENER DESIGN

In most situations you will want the participant to fill out a screener survey, to let you filter out ineligible participants and ensure you have appropriate distribution of participants among your target segments. The more public your recruiting, the more important the screener.

Designing a good screener can be tricky - you want to ensure you identify eligible participants, capture partial-fit participants for manual screening, and screen out ineligible participants, all in a short, simple survey.

RECOMMENDATIONS

- **Keep it short** - max ~5 questions or two minutes. Long screeners reduce participation rate significantly, and shouldn't be required if you clearly know you desired profile.
- **Cover each criteria with a question** - e.g. if you seek participants who work in (a) architecture, (b) in companies with 500+ employees, (c) with budget ownership for planning software (d) who have evaluated this kind of software in the past year, that's the frame of your screener. Add an open-ended question to evaluate their credibility and you're pretty much done.
- **Only include relevant criteria that you cannot capture elsewhere** - does your B2B screener really need demographics questions? Can you capture geo data based on IP address? If you are recruiting from LinkedIn, don't ask about factors that can be scraped from their profile.

- **Ensure you keep in data on partial-fit candidates** - a common issue in screeners are ones that exclude all but the perfect profiles. If you're recruiting from a small target audience (which in B2B is the case more often than not), err on the side of keeping in partial-fit profiles which you can manually exclude later.
- **Don't reveal your preferred responses** - respondents will game your screener if you make it clear what profile you're looking for. Avoid leading questions and include filler answers to mask your objectives.
- **Go from general to specific** - start with broad firmographics, finish with specific questions on e.g. product usage or industry experience.
- **Be deliberate in using industry jargon** - industry terminology can be helpful in filtering out respondents without appropriate knowledge, but make sure you're not excluding eligible participants by using too niche language.
- **Make sure to include an 'other'** - a lot of respondents won't match any of your answer options, so make sure you include a catch-all 'Don't know/NA/Other' choice. Include a text-field - e.g. 'Other (please specify)' - to get more info on how your ineligible respondents break down.
- **Include (exactly one) open-end question** - open-ended question, where respondents are asked to write in their answer themselves rather than selecting from a pre-populated list, are very useful to gauge respondents' knowledge and ability to articulate their feedback, and they are the best way to identify spam responses, but they take a lot of time for you and the respondent, so use them sparingly. As in, include exactly one.
- **Ask concrete questions** - ask about e.g. past behavior or specific responsibilities, don't ask hypotheticals (e.g. 'how likely are you to switch invoicing software in the next 18-24 months') or preferences in your screener.

- **Iterate rapidly** - review screener responses as soon as they start to come in, and change questions if they don't work. Normally you wouldn't want to change a live survey, but for screeners, that's less of an issue.
- **Use survey logic for branching screeners** - branching surveys allow for more granular control of what you ask each respondent, allowing you to e.g. ask industry-specific follow-up questions once you know what industry a respondent is in.
- **For qualitative research, don't hesitate to double screen** - if you need more info than the initial screener allows for, send a personalized email to potential participants with follow-up questions. Make sure this doesn't feel like a second survey, but as the start of a 1:1 conversation.
- **Leverage your screener for insights** - there will be a lot of interesting information in the screener data. E.g. if you are recruiting from your community, the screener data can give you a pretty good idea of its breakdown by role, industry, etc.

SCREENER SURVEY EXAMPLES

Some links with more advice and examples of screener questions:

- UserInterviews blog
- UXDesign blog
- Qualaroo blog

4F. REDUCING NO-SHOWS

Participation in a research call or meeting will always be more important to you than it is to the participants, so it's on you to make it easy for them to remember their appointment and know how to join.

After you have decided that someone is the right candidate:

- Immediately send a follow-up email to lock down the time for the interview.
- Once you have a time agreed, send an invite with all relevant information. Don't expect participants to remember exact details if the call is in three weeks, so outline the purpose of the call as well as video links and dial-in numbers.
- Always offer both video and phone dial-in, and ensure you use a service that is simple to operate.
- Cover any NDA or other paperwork before the call.
- Follow up with a reminder on the day of the interview (some third party recruiters do 'day before/day of/30 minutes before' reminders - I find that a bit much, but I expect it helps reduce no-shows significantly).

If you're running focus groups, I'd encourage you to over-recruit (e.g. recruit 8 participants for 6 slots). If all participants show up, you can either send some home or, in B2B settings where participants are rare, just work with the larger group.

4G. LEGAL CONSIDERATIONS

Research projects can be a legal and PII minefield, as you're working a lot with personal information. Cultivate a good relationship with your legal team - they will be the ones telling you "no, that will get us sued in the EU" to your clever idea for how to expand your recruitment base.

Some topics you'll want to review with legal:

- **Who you can contact** - for example, what opt-out rules do your survey emails have to adhere to.
- **Regional PII rules** - regulation for how to deal with PII varies significantly between regions, with especially EU law evolving rapidly. It's easy to be out of compliance due to using obsolete information.
- **Sharing company data with vendors** - if you run surveys, you will probably use a third-party cloud based survey platform. Work with legal to understand what data you can and can't store in the platform, and how to minimize PII shared with vendors.
- **Vendor contracts' PII terms** - if a vendor shares a participant's information with you, make sure it's clear how it is supposed to be stored, who is responsible for it, what happens if an EU customer asks for their data to be scrubbed from the vendor system, etc.
- **Incentive distribution terms** - sweepstakes T&Cs can be incredibly complicated. Same with the tax implications when you start distributing incentives to participants.

Bring your legal team in early in the process, brief them on your objectives and ask for help on how to achieve them. Legal can often help find solutions that let you achieve your objective with some tweaks if you bring them in early, rather than springing a fully formed project on them at the last minute and force a go/no-go decision.

TL;DR - PROCESS BEST PRACTICES

Chapter 4 discusses how you can effectively conduct recruitment, whether in-house or through a vendor.

The chapter covers:

- **How to define your target profile** and how it's important to carefully consider your extended target audience when doing B2B research
- **How you design communication** that gets potential participants interested and willing to respond to a stranger over the internet.
- **Advice on how to effectively initiate a conversation** about a new project with a research vendor.
- **How to manage research incentives** including how to decide on what type of incentives are best suited to a project, how much to offer different participants for different kinds of research projects, and - critically important - about looping in your legal team early to avoid costing your company money.
- **Designing effective screeners** to ensure you get the participant profiles you are after, while avoiding common mistakes.
- **Reducing participant no-shows** so that once you have recruited that ideal interview subject, they actually show up on time.
- **The topics you will want to run by your legal team** before you launch.

FURTHER READING

- GreatQuestion - How To Do Better Research Recruitment, Faster
- GreatQuestions - Best practices for UX research participant recruitment
- Marketade - Recruiting Hard-to-Find Enterprise Professionals for User Research
- Drive Research - Ultimate Guide to Recruiting Participants for Market Research
- SurveySparrow - 8 Survey Incentive Ideas and How You Can Use Them
- PlayBookUX - 11 Tips for Creating Effective Screener Questions
- Speero - The Ultimate Guide to Moderated User Research
- Qualtrics - Ultimate Guide to Conducting Market Research

ABOUT ULF

I'm a freelance research consultant, specialized in B2B market research. Having conducted hundreds of interviews, focus groups and surveys for B2B clients, I know the unique challenges that come with selling to other businesses.

A research veteran with 15+ years of experience leading, executing and commissioning research, my background is in building and growing in-house research teams in the technology industry.

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