

# What's Next at User Interviews

Fall 2024



INTRO

# Who you will hear from today







# Zoe Nagara

Marketing

**Carol Guest** 

Product

**Claire Mai** 

Product



# Agenda

- Top 3 Recent Releases
- Top 5 Coming Soon
- A look ahead to 2025 Feedback requested!





WHAT'S NEW

# Top 3 Recent Releases



TOP RECENT: #3

## Opt-In Forms 2.0

LAUNCHED

🗧 🛢 HUB

# We launched a major update to new opt in

**forms** to make them more flexible, powerful, and beautiful.

- $\checkmark$  Page separations and skip logic
- $\checkmark$  A cleaner participant experience
- Easily update existing participant information



Participants who join from an opt in are **6x more likely to respond** to an invite than participants who joined from a .csv upload or API.

Join our Panel!	
Description	~
Nelcome to the ProduceMart Feedback Panel!	
Help us make the best fresh produce market eve quick questions.	r by answering a few
What's in it for you:	₹.
<ul> <li>Thank you gifts, such as e-gift cards, swag, surprises</li> </ul>	
<ul> <li>Early access to new features and products</li> <li>Connect directly with ProduceMart product</li> </ul>	김 산은 영상은 사람이 있는 것 같은 것이 아니는 것 같은 것이 없는 것이 없다. 것이 같이 많이 많이 많이 많이 없다.
lave questions? Check out our FAQs.	
What type of produce do you typically purchase	e at ProduceMart?
⊖ Fruit	
<ul> <li>Vegetables</li> </ul>	

Dairy products

#### TOP RECENT: #2

## Observer session sign up

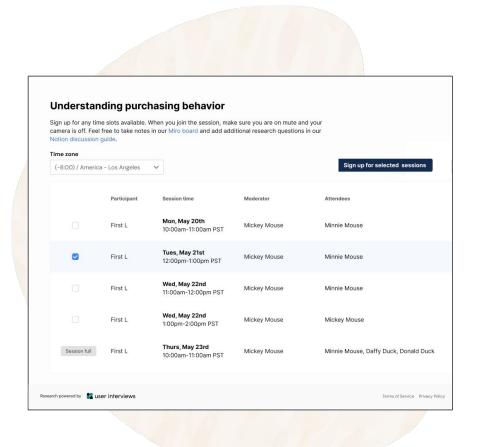
LAUNCHED

Your teammates can sign up to join sessions with less coordination overhead from you.

- Quickly share a link with anyone who may want to join
- Customize your instructions with ground rules and relevant links
- $\checkmark$  Automate invites and reminders



**Teams with a democratized research culture are 2x more likely to state that research influences strategic decisions** – Maze's Future of User Research Report





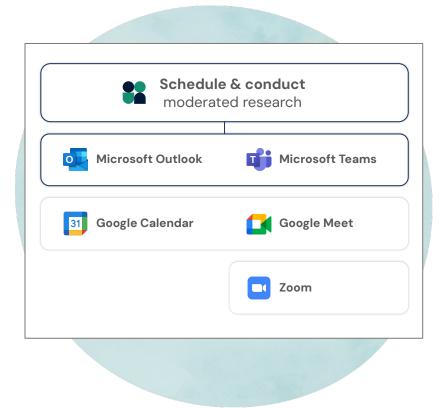
#### TOP RECENT: #1

# Integrate with Microsoft

LAUNCHED

We are adding more integrations, so you can pull other tools into your workflow

- ✓ Outlook for automated scheduling
- ✓ Teams videoconferencing





**Top request from this group.** Thank you all for the ongoing feedback!



WHAT'S NEXT

# **Top 5 Coming Soon**



COMING SOON #1

# Project Dashboard Search OCT 2024

A small but common request: **Search for all projects on the project dashboard**.

All (2)	Drafts (1)	Active (0) Pendin	g close (0) Completed	(1) 🖹 🖓	Q UX Interface
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	erface Test - G	22 2024 ticipants by Minnie Resea	rcher		
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				Scheduled	Completed
	Requested	Qualified	Approved	Scheduled	Completed





#### COMING SOON #2

## Faster Participant Review **FALL**

FALL 2024

We're revamping the participant review process to find the best participants faster and easily track them through research.

- $\checkmark$  More flexible table views
- ✓ Clearer participant funnel
- ✓ Bulk actions
- ✓ Notes and tags

*	Projects / Continuous di	iscovery Q3 2024 ④ Active			
- <b>₽</b>	Research design	articipant management			
	Invited (91) Applied (22) P	Potential (8) Approved (10) Sched	uled (0) Completed (0) I	Removed from study (0)	
	∓ Filter      In Columns				
	Participant ~	How many pets do V	How long have you o $\lor$	Which of the followin $\lor$	Tags 🗸 🗸
	Abel Upton uptona@outlook.com	0-1	0-1 year	Feeding, grooming	New pet owner
	Frank Kuhic fkuhic@gmail.com	0-1	2-4 years	Vet visits, feeding	Experienced pet owner
	Joey Funk funkyjoey@gmail.com	2-3	2-4 years	Buying pet suppli	Experienced pet owner
	Kristina Hansen hansenkristina@gmail.com	0-1	0-1 year	Feeding, grooming	New pet owner
	Shelly Ruecker ruekers@gmail.com	0-1	More than 5 years	Walking, feeding	Seasoned pet owner
	Thelma Senger thelmasenger@yahoo.com	2-3	0-1 year	Buying pet suppli	New pet owner
0	Valerie Tan valerietan@gmail.com	More than 3	More than 5 years	Vet visits, feeding	Seasoned pet owner
КВ	William Anwar wanwar@gmail.com	More than 3	2-4 years	Walking, feeding	Experienced pet owner



### Participant Review - Flexible Table Views

- Contraction -							
•	Projects / Continuous discov	ery Q3 2024 (i) Active				RR MG Save	]:
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	Participant V	How many pets do 🗸	How long have you o $$	Which of the followin $\vee$	Tags V	Notes ~	Where d
	Abel Upton uptona@outlook.com	<ul><li>➢ Hide</li><li>↑ Sort ascending</li></ul>	0-1 year	Feeding, grooming	New pet owner	Possibly caring for a puppy	Online 1
	Frank Kuhic fkuhic@gmail.com	<ul><li>↓ Sort descending</li><li>☑ Freeze</li></ul>	2-4 years	Vet visits, feeding	Experienced pet owner	-	Social r
	Joey Funk funkyjoey@gmail.com	2-3	2-4 years	Buying pet suppli	Experienced pet owner	Laid back owner	Vet
	Kristina Hansen hansenkristina@gmail.com	0-1	0-1 year	Feeding, grooming	New pet owner	Possibly caring for a puppy	Friends
	Shelly Ruecker ruekers@gmail.com	0-1	More than 5 years	Walking, feeding	Seasoned pet owner	Practical caretaker	Social r
	Thelma Senger thelmasenger@yahoo.com	2-3	0-1 year	Buying pet suppli	New pet owner	Ask: are all their pets 0-1y?	Social r
?	Valerie Tan valerietan@gmail.com	More than 3	More than 5 years	Vet visits, feeding	Seasoned pet owner	Practical caretaker	Friends
КВ	William Anwar wanwar@gmail.com	More than 3	2-4 years	Walking, feeding	Experienced pet owner	Age range?	Vet



### Participant Review – Full Participant Funnel

*	Proj	ects / Continuo	us discovery Q	3 2024 (i) Acti	ve				RR MG	, 🖻 :	
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	÷ F	Participant	√	Status	∨ Appl	lied date 🗸 🗸	How would you desc 🗸	What features or qualities do	you V I	U How many pets do y	
		Theodore Jacob Electrician	3	Qualified 100% match	Sep	otember 10, 2024	He's active, and	Durability and price, how	w	1-2	
		Joanne Spencer Legacy Response	Producer	Qualified 100% match	Sep	tember 9, 2024	Very outgoing, lo	Quality of materials used	. :	3-5	
		Drew Batz Response Orches	trator	Qualified 100% match	Sep	tember 9, 2024	Quiet and chill	I'll look at the price range.	. :	3-5	W. J. V
		David Conn Communications	Supervisor	Qualified 100% match	Sep	tember 9, 2024	Likes people, esp	How durable it is, and whe	a	1-2	
		Maria Conn Accounts Adminis	trator	Qualified 100% match	Sep	tember 9, 2024	Generally active	Quality of materials used	. 1	1-2	
		Patsy Collier Implementation A	ssociate	Qualified 100% match	Sep	tember 9, 2024	Clever and outg	How durable it is, and whe	·	1	
0		4 participants s	elected					Potential fit Not a fit	Approve		
КВ	Showin	Valorio Tan 19 1-20 of 10467 20	∽ per page						1 2 3	>	

## Participant Review - Bulk Actions

3	Proje	cts / Continuous discovery	Q3 2024 ④ Active			RR MG	□ ⊑ :
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	∓ Fil	ter ┆┆ Columns					Q
		Participant V	Status 🗸	Applied date 🗸 🗸 🗸	How would you desc $$	What features or qualities do you $$	How many pets do y
		Theodore Jacobs Electrician	Qualified 100% match	September 10, 2024	He's active, and	Durability and price, how w	1-2
		Joanne Spencer Legacy Response Producer	Qualified 100% match	September 9, 2024	Very outgoing, lo	Quality of materials used	3-5
		Drew Batz Response Orchestrator	Qualified 100% match	September 9, 2024	Quiet and chill	I'll look at the price range	3-5
		David Conn Communications Supervisor	Qualified 100% match	September 9, 2024	Likes people, esp	How durable it is, and whe	1-2
		Maria Conn Accounts Administrator	Qualified 100% match	September 9, 2024	Generally active	Quality of materials used	1-2
		Patsy Collier Implementation Associate	Qualified 100% match	September 9, 2024	Clever and outg	How durable it is, and whe	1
		4 participants selected				Potential fit Not a fit App	rove
_		Valaria Tan					
	Showing	1-20 of 10467 20 🗸 per page				1 2	3 >



### Participant Review – Custom Notes and Tags

**	I	Projects / Continuous discove	ery Q3 2024 ④ Active				RR MG	Save	
24 C		Research design Particip	Dant management	duled (0) Completed (0)	Removed from study (0)			Tags V	1
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		Participant V	How many pets do 🗸 🗸	How long have you o $\checkmark$	Which of the followin $\lor$	Tags 🗸 🗸	Notes	New pet owner	
		Abel Upton uptona@outlook.com	0-1	0-1 year	Feeding, grooming	New pet owner	Possit a pupj	Experienced pet owner	
		Frank Kuhic fkuhic@gmail.com	0-1	2-4 years	Vet visits, feeding	Experienced pet owner		Experienced pet owner	ĺ
		<b>Joey Funk</b> funkyjoey@gmail.com	2-3	2-4 years	Buying pet suppli	Experienced pet owner	Laid b	Experienced pet owner	
		Kristina Hansen hansenkristina@gmail.com	0-1	0-1 year	Feeding, grooming	New pet owner	Possit a pupj	New pet owner	/
		Shelly Ruecker ruekers@gmail.com	0-1	More than 5 years	Walking, feeding	Seasoned pet owner	Practi		
		Thelma Senger thelmasenger@yahoo.com	2-3	0-1 year	Buying pet suppli	New pet owner	Ask: a 0-1y?	Seasoned pet owner	
0		Valerie Tan valerietan@gmail.com	More than 3	More than 5 years	Vet visits, feeding	Seasoned pet owner	Practi	New pet owner	
КВ		William Anwar wanwar@gmail.com	More than 3	2-4 years	Walking, feeding	Experienced pet owner	Age ra		

## Automated Hub Invitations FALL 2024

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We are overhauling the Hub invitation experience to give you more control of who you invite and when.

- ✓ Keep an ongoing shortlist of candidates
- $\checkmark$  Automate recruitment with drip invitations



Research Hub users send 200k+ invitations each month

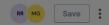
Set automated invitation cadence $\qquad  imes$						
Invite 5 v participants every 2 v weeks v						
starting Select date v at Select time v						
until a specific date 🗸 📄 Jan 1, 2025 🗸						
Participants will not be invited unless they meet the criteria set in your Hub invite rules at the time of invitation.						
Cancel Set invitation cadence						



Resear	ch design Participant m	nanagement						
Shortli	sted (22) Invited (91)	Applied (91) Potential (8) Appro	ved (10) Scheduled (0	) Completed (0)	Removed from study (0	))		
ŦF	ilter 해 Columns 5	Select subset						Q
	Participant	Select a specific number	f Airline	Last invited	Uses App	Subscription active	Delta flyer	
	Andrew King andrew.king5@gmail.co	<ul><li>3 participants</li><li>Start at the top of list</li></ul>	Ita	184 days ago	Yes	Yes	Yes	
	Lena Roberts lenaroberts3@gmail.cor	Select in random order	uthwest	158 days ago	No	No	Yes	
	Alex Smith alexsmith4@gmail.com	Cancel Se	Jita	93 days ago	Yes	Yes	Yes	
	Zoe Hanson zoehanson32@gmail.com	3	Delta	43 days ago	Yes	Yes	Yes	
	Malik Lindsey mlindsey5@gmail.com	2	JetBlue	21 days ago	Yes	Yes	Yes	
	Eve Cooper evecooper7@gmail.com	2	Frontier	111 days ago	Yes	Yes	Yes	
		2	Frontier	111 days ago	Yes	Yes	Yes	

	Projects / Continuous di	iscovery Q3 2024 🔅	Draft				RR MG	Save
29	Research design     Participant mail       Shortlisted (22)     Invited (91)     A	-	pproved (10) Schedu	led (0) Completed (0)	Removed from study ((	0)	윤· Import 님	⊻ Export
	〒 Filter 해 Columns 5	Select subset						Q
	Participant	Flights booked per year	Pref Airline	Last invited	Uses App	Subscription active	Delta flyer	Delta flyer
	Andrew King andrew.king5@gmail.com	1	Delta	184 days ago	Yes	Yes	Yes	Yes
	Lena Roberts lenaroberts3@gmail.com	2	Southwest	158 days ago	No	No	Yes	Yes
	Alex Smith alexsmith4@gmail.com	1	Delta	93 days ago	Yes	Yes	Yes	Yes
	Zoe Hanson zoehanson32@gmail.com	3	Delta	43 days ago	Yes	Yes	Yes	Yes
	Malik Lindsey mlindsey5@gmail.com	2	JetBlue	21 days ago	Yes	Yes	Yes	Yes
	Eve Cooper evecoo	2	Frontier	111 days ago	Yes	Yes	Yes	Yes
0	3 participants selecte Rowan rowanbell7@vahoo.com	ed		, ,	Remove from project	Launch project and in	vite participants	Yes
КВ	Showing 1-22 of 22						Page	1 of 3

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me.	



Participant management Research design Set automated invitation cadence Х ± Export Shortlisted (22) Invited (91) Applied (91) 음 Import = Filter 해 Columns 5 Q Select subse Pref A **Delta flyer Delta flyer** Participant participants every Invite 5 2 V weeks V V Andrew King Delta Yes Yes andrew.king5@gmail.com Select date () Select time starting  $\sim$  $\sim$ at Lena Roberts Sout Yes Yes lenaroberts3@gmail.com a specific date ::: Jan 1, 2025 until V ~ Alex Smith Delta Yes Yes alexsmith4@gmail.com Participants will not be invited unless they meet the criteria set in your Hub invite rules at the time of invitation. Zoe Hanson Delta Yes Yes zoehanson32@gmail.com Malik Lindsey JetBl Yes Yes mlindsey5@gmail.com Set invitation cadence Cancel Eve Cooper Frontier 111 days ago Yes Yes Yes Yes Yes evecooper7@gmail.com **Rowan Bell** Frantiar OT days Showing 1-22 of 22 Page 1 of 3

#### Concept - Design in progress

# Hub Salesforce Integration **OCT 2024**

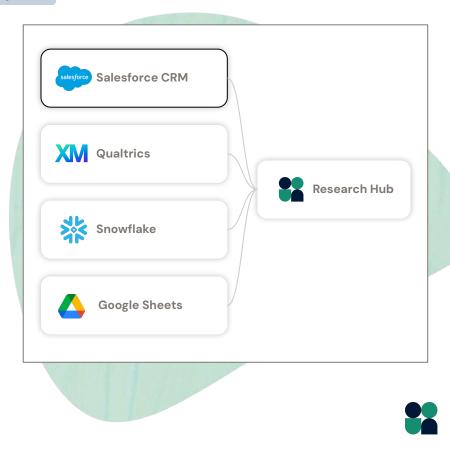
🔋 HUB

**Get fresh participant data in Hub** with an embedded Salesforce integration.

- $\checkmark$  In-app authentication and field mapping
- $\checkmark$  No technical resources required
- ✓ Real-time syncing (SF to UI)
- In consideration: Qualtrics, Snowflake, Google Sheets



**Salesforce** is top requested integration among Hub users. What does your team use?

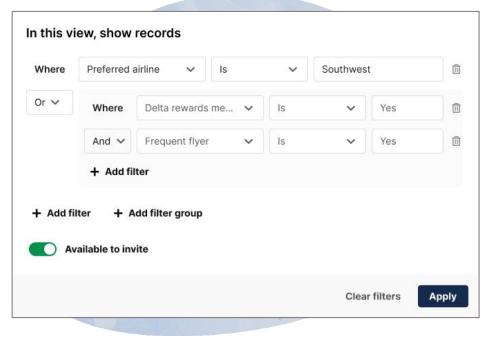


# More Powerful Filters in Hub

FALL 2024 🔋 HUB

Find the best participants in Hub based on any criteria.

- ✓ More robust logic, including "or" filters and filter groups
- ✓ Filter on any Hub fields
- Improved UX, including enumerated options for each field and the ability to add a list of filter terms





**94% of researchers** who recruit from Hub **use filters** to narrow their search



**ON THE HORIZON** 

# 2025 Look Ahead



#### 2025 Look Ahead

# **Recruit 2025 Investment Themes**

**Recruit Mission**: Find quality participants for any study and make it effortless to conduct research with those participants.



Audience Quality

Trusted, verified participants with less screening required



Audience Feasibility

From niche participants to a global audience



Research Workflow

Screeners, quotas, scheduling... everything you need to find Ps fast



### Everything Unmoderated

New pricing, experience & integrations to make more research possible



#### 2025 Look Ahead

# **Research Hub 2025 Investment Themes**

**Hub Mission**: Build the best panel of your own users to accelerate recruitment and build insight over time.



Panel Management

Build, manage, and maintain multiple panels with ease



Participant Experience

Seamless and flexible flows for every participant



### Research Workflow

Screeners, quotas, scheduling... everything you need to find Ps fast



### Everything Governance

Guardrails, templates, enablement, and oversight to manage your team







# **Questions?**

See you at the What's Next at UI webinar in January 2025!