

# Research Participant Screening Guide



## 1 Research Objectives

What questions are you trying to answer?

What insights are you seeking?

Understanding the purpose of your research will help you identify the types of participants you need.

## 2 Review Existing Data

What do you know about your target audience?

This could be customer profiles, market research reports, analytics data, or feedback from previous research.

Look for patterns and trends that can help you identify the types of participants who are most relevant to your research objectives.

## 3 Participant Criteria

This criteria should be based on the **objectives** of your research and the **characteristics of your target audience**.

Identify the most important criteria for your research:

- demographic factors (age, gender, occupation)
- behavioral factors (usage patterns, purchasing behavior)
- social factors (values, attitudes, lifestyles)
- other relevant characteristics

## 4 Create Screener

### • Describe your screener/research

-be clear what it's about

-who is it aimed at

-participants data protection and consent forms

-how long will it take

### • Write screening questions

-keep it short and relevant to the research

-use mix of questions type (multichoice, open ended etc)

### • Order screening questions

-identify unsuitable candidates at the start, put disqualifying questions at the top

-start broad, then narrow it down

-don't give away the "right" answers

### • Test your screener

## 5 Recruit Participants

- Social media
- Online groups or communities
- Personal database
- Mailing list etc

## 6 Screen and Select Participants

- evaluate potential participants
- determine if they meet your criteria
- screen out applicants who do not meet the necessary requirements

## 7 Iterate as Needed

Remain flexible and open to iterating on your participant selection criteria if needed throughout the process.



Project name

**RESEARCH OBJECTIVES**

**EXISTING DATA**

**PARTICIPANT CRITERIA**

**DESCRIBE YOUR RESEARCH**

**WRITE SCREENING QUESTIONS**