A Buyer's Guide to Experience Research Platforms

How to select the right Experience Research Platform to drive meaningful business impact

Feeling analysis paralysis because of the glut of tools, solutions, and vendors available for research teams? Use this guide to determine which offering will best serve your organization's needs.

> "The cost of inaction related to designing product experiences could be as much as a 10% loss in revenue growth potential."
>
> The McKinsey Quarterly "The Business Value of Design"

Experience Research platforms do not replace research expertise. Instead, they help research teams scale their capacity and impact. Certain platforms even facilitate the education and enablement of novice or non-researchers through clear processes, guardrails, and support.

Leading companies like Google, Spotify, Airbnb, Verizon, Duolingo, and Uber all understand how user experience impacts the bottom line. They invest in ongoing research throughout the buyer's journey, constantly collecting customer feedback.

But how do they stay on top of initiatives with tight timelines and limited resources?

They invest in flexible tools that support all types of research (qualitative and quantitative, foundational, generative, and evaluative) and parts of the research process (recruit, field, manage, analyze, and share).

Whether you're a large, widely-known enterprise organization or a smaller team just getting started, having the right tools can expand your impact and dramatically impact the bottom line.

So what should you look for in a tool? Let's dive in…

Recruit: High-quality, diverse, engaged, and available participants

Recruiting the right participants is often cited as the most challenging part of any research study.

You'll want a platform that can source participants from a range of socioeconomic backgrounds (across states, countries, income, ethnicity, gender identity, age, and more), plus gives you the ability to "bring your own" participants when needed.

Since bad participants = bad data, it's beneficial to ask the provider how active and engaged their participants are, and inquire about their number of no-shows and incomplete unmoderated missions.

Some questions to ask:

- ☐ How are participants chosen?
  - ☐ Are they vetted in any way?
- ☐ Is there an option to automate participant recruitment based on my criteria?
- ☐ Is there an option to manually review and choose participants on a 1-1 basis?
- ☐ Is there an option to "bring our own" participants?
  - ☐ Can we easily import them somehow?
- ☐ What's your average number of no-shows/incomplete missions?

Field: Support for a wide range of methods and timelines

It can be tempting to look for a solution that solves for your most immediate project needs, but that can end up costing you more in the long run as you try to expand the impact of your research.

Instead, look for a tool that can accommodate a range of research methods, capture data in different formats or via different devices, work moderated or unmoderated, and even bridge the gap between qualitative and quantitative research.

The best experience research platforms can serve as your all-in-one destination for everything related to research, helping you to consolidate tools and cut costs.

Some questions to ask:

☐ Can I do moderated (e.g., interviews) and unmoderated (e.g., task-based) research?

☐ Does the platform have a panel?

    ☐ If so, who comprises it?

☐ If I need to bring my own participants, can I?

    ☐ Will they be marketed to or automatically added to the vendor's pool?

☐ Are there mobile and desktop options?

☐ Do participants have to download and utilize an account or app?

☐ Can we do foundational, generative and evaluative research?

☐ Can I do research in a super short time frame (like a matter of days, not weeks)?

Manage: Streamlined research ops

How much time do you currently spend on administration tasks like setting up invites, managing calendars, and paying incentives? Wouldn't you rather be focused on conducting the research and extracting insights and value?

When evaluating vendors, focus on the participant management capabilities they offer. Look for a solution that offers automated consent forms, session scheduling, and incentive distribution to save you time and precious resources.

Some questions to ask:

- ☐ How are incentives processed?
- ☐ Is there a fee?
- ☐ Can I create my own panel or participant pool?
- ☐ Is there transcription for audio or video data?
- ☐ What analysis capabilities are on-tool (e.g., tagging, note taking)?
- ☐ Are there ways to message or follow-up with participants?
- ☐ For interviewing, can I schedule sessions directly from the platform?

"While researchers are focused on conducting research to make marketing and product decisions, research ops play a critical role to improve the effectiveness and efficiency of how research is conducted.

Our Re-Ops teammate onboarded an incentive platform that saved hours of manual work per study and provided participants with a greater selection of incentives. In turn, the improved incentives increased participation rates."

Andy Warr, Research and Insights Leader at Dropbox

Analyze: Automation to convert data into insights

Timelines are always tight and teams are too lean. You need a solution with powerfully efficient analysis capabilities to identify trends and get to actionable insights faster

Many platforms offer automated reporting features such as:

- Tagging, tag charts, and PDF or CSV exporting
- High-level summaries of close-ended questions, rankings, and word frequency
- Flexible filtering: sort, group and filter by tags, groups, question types, demographics, and more.
- Expert handling of video data: auto-transcription of your videos, add time markers and highlights, and cut them into insights directly in the platform.

Be sure to ask about these functionalities, as they can significantly accelerate your reporting outputs and allow you to focus more energy on storytelling and less on sifting and searching.

Share: Control over what you share

In order for research to have impact, the insights must be shared. But data and numbers rarely generate the level of excitement that stories and human expressions can stir up! That's why it's important to consider what you're able to share via an XRP and how you can share it.

Some questions to ask:

- ☐ What kinds of account access or seats are available?
- ☐ Can stakeholders view sessions or data while the study is in progress?
- ☐ Can I limit what viewers can see (i.e. to protect the privacy of participants)?
- ☐ How easy is it to make a highlight reel or export other visuals like photos or word clouds?
- ☐ What integrations do you offer so stakeholders can view outputs where they are comfortable operating?

Robust support

Regardless of your team's size, having on-hand support (or not) and the kinds of support a platform can provide is a strong predictor in whether or not you see ROI and maximize the value of the platform.

Reflect on your team and your own bandwidth: Do you have a principal researcher who folks can route questions to? Are you available to help if/when it's needed?

If not, make sure to dig into the platform's on-staff support. Better yet, ask for a conversation with a support person.

Support can make a massive impact on your success, especially if your team is lean, up against tight timelines, or includes research-adjacent roles. Not only can a support team help you operate the platform or manage participants, but they might even be able to help mentor junior colleagues, conduct analysis, and serve as extensions of your team—further boosting your ROI.

Some questions to ask:

- ☐ Is there a dedicated support person assigned to my team?
- ☐ When and how can I access support?
- ☐ What can the support team help me with? Can they help with study design? Recruiting? Analysis?
- ☐ Are support staff technical/platform experts only, or can they help uplevel my work?

Secure and compliant

Your organization likely has requirements around privacy, security, and compliance that any vendor or service provider must meet, especially if you work in a regulated industry or conduct business internationally.

In addition to technical elements associated with software, your participants' data is also crucial to maintain and protect. Don't hesitate to ask about facial anonymization, data scrubbing, and client-side invisibility.

Some questions to ask:

☐ Is data encrypted? Where is data stored?

☐ Can data be exported from the platform? Can data be deleted from the platform?

☐ Does the tool have a dedicated privacy, security, or trust team?

☐ Has the tool earned any certifications (e.g., ISO or HITRUST)?

☐ Is the the platform HIPAA-compliant?

☐ Can the platform provide detailed security information, such as a SOC2 Type 2 report?

☐ Can informed consent documents be created and uploaded?

Pro tip:
Consider asking your own security, legal, and compliance teams to review vendor documentation early on in your evaluation process. This could prevent you from wasting time on an evaluation if it does not meet your company's standards and could also speed up the procurement process once you've made your selection.
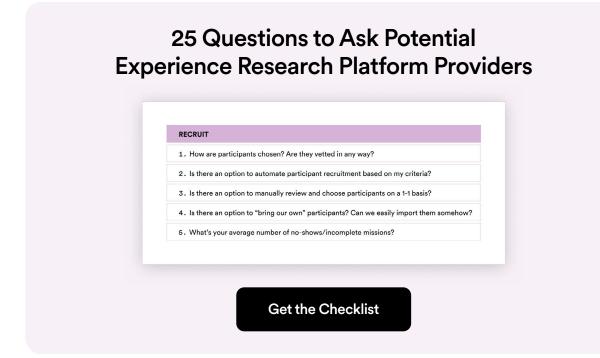
Additional considerations

If you've found yourself choosing between a number of tools that meet your requirements, here are a few other things to consider:

☐ Do they have favorable reviews? Check third-party review sites like G2 and Capterra for verified feedback from users.

☐ What do industry analysts, like those from Forrester or Gartner have to say about them?

☐ Have they earned independent awards?

☐ What is their selling process? Do you feel seen and heard by your point of contact? Have your questions been answered? Are you able to test out or trial the platform before buying?

☐ To what extent do they support the broader community? Do they host or attend events, create programming, provide resources, or maintain other initiatives that suggest a commitment to the space beyond selling software?

The market for research software has never been as active and diverse as it is now. Experience and insights teams have hundreds of options before them. A careful selection process helps ensure the long-term success of your research initiatives.

The right research tool shifts from a platform to a partner, helping teams scale, speed up, and smooth their research practice, further building empathy and insight impact org-wide.

25 Questions to Ask Potential Experience Research Platform Providers

RECRUIT

1. How are participants chosen? Are they vetted in any way?

2. Is there an option to automate participant recruitment based on my criteria?

3. Is there an option to manually review and choose participants on a 1-1 basis?

4. Is there an option to "bring our own" participants? Can we easily import them somehow?

5. What's your average number of no-shows/incomplete missions?

Get the Checklist

Do research that resonates

dscout was built for researchers, by researchers. Research teams at some of the world's most innovative companies trust dscout to conduct end-to-end user experience research, all within a single robust platform.

Google   Uber   Spotify   verizon✓   duolingo   salesforce   airbnb

"The [stakeholder] doesn't care about your tools—they just care about the information. I want the tools we use to be as invisible as possible. dscout made that happen through a comparatively elegant experience."

Gretchen McNeely, Design Director at Fjord

Explore how dscout can support your research goals today

[Let's chat]