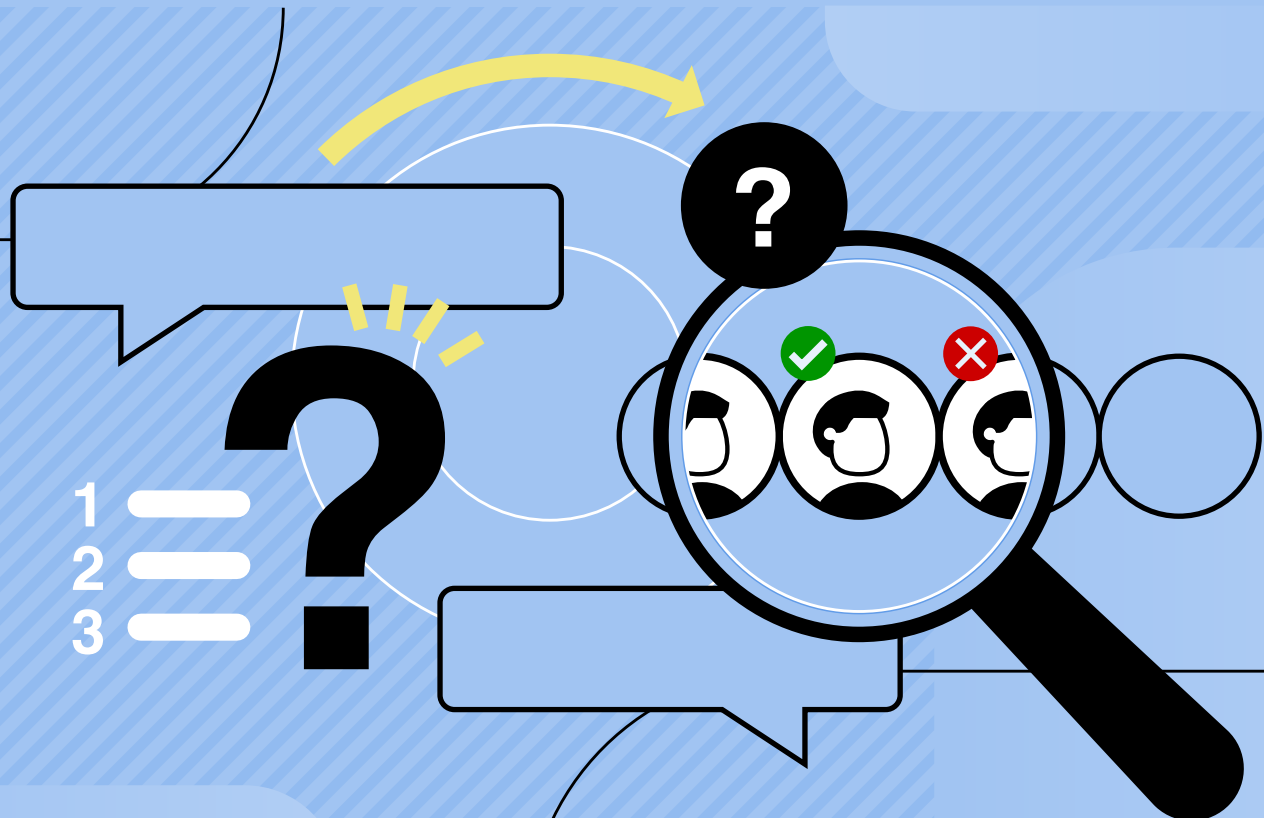


How to Screen for:

B2B Unmoderated Studies



How to Screen for B2B Unmoderated Research Studies

Screeners surveys are an integral step at the start of every research project. They are especially important for unmoderated projects where you will be unable to gauge participant value or pivot your line of questioning midway through a session. Because **B2B participant recruitment** already presents a handful of challenges, it's a good idea to have an especially well designed screener.

While screener surveys can be quite short, there are a few pitfalls to avoid to ensure that the **participants you recruit** are high quality, relevant, and ready to engage in your research. A well-crafted screener can help you avoid wasting time and money on participants that are the wrong fit, dishonest, or unable to meaningfully engage.

To recruit the ideal participants for research, your screener survey walks potential participants through a short series of questions to ensure you find participants with the experience, behaviors, and background that you're looking for.

Think of a Screener as a Funnel

It can be helpful to think of your screener like a funnel. Each question will work to narrow down responses to find participants that fit your criteria. To avoid wasting participant time and ensure screener completion, begin with your most important criteria and move to more specific questions.

For example, suppose you were planning a usability test for a new lead-scoring feature for enterprise sales professionals in your marketing automation software. In that case, you might organize your questions like this.

These screener questions will efficiently narrow responses to find the ideal participants when including qualifying logic on each question.



How to Create a Successful Screener Survey

1. Begin with ensuring your research goals are clearly defined and available for reference.

Every successful research project begins with clearly defining your goals and the **questions you are trying to answer**. Have these goals documented and ready to refer to as you determine the characteristics of your ideal research participants.

2. Define your ideal participant.

- List the exact behaviors or experiences you are targeting.
- Define the frequency and recency of the behaviors you are targeting.
- Is it important that a relevant behavior recently happened so that it is top of mind?
- Is it important that a participant does a specific behavior often?
- Define the skill level or level of experience of your ideal participant.
- Do you want someone with no previous knowledge of your feature or product?
- Are you looking for someone highly proficient in a particular skill?
- List the goals your user wants to accomplish in performing your desired behaviors.
- List any demographic qualities that are integral to your study.
- Do you need to work with participants of a particular age group, income level, or gender?

Types of Participant Criteria

While demographic data can be valuable information for ensuring diversity of opinion and providing insight, focus your questions on behaviors and psychographics unless a demographic detail is an essential criteria for your ideal participant.

We've provided some examples for each that could be criteria for the sales professional usability study above.

Behaviors: Actions or habits that a person performs

Example: Our ideal participant reviews incoming lead scores to help them prioritize contacts every week. They currently use our software.

Psychographics: Interests, personality traits, values, attitudes, and beliefs

Example: Our ideal participant values having contacts prioritized for them, so they and their team can spend more time talking to customers.

Demographics: Age, gender, income level, marital status, household size, etcetera

Example: Our ideal participant is a manager at a large company

Geographics: Country, region, state, city, etcetera

Example: Our ideal participant works in the United States

3. **Create or compile your screener questions based on the ideal participant criteria. Include a qualifying screener question for each necessary participant criteria.**
4. **Rank your questions from most important to least important, least specific to most specific. Group questions that are similar or have interdependencies.**
5. **Include a segmentation screener question if you need to group participants into specific segments to ensure you cover a diverse range of experiences.**
6. **Build your screener survey.**

Depending on how you plan to recruit your research participants, there are many available survey and form options, from DIY recruiting options using your database with Google Forms or SurveyMonkey to participant recruiting platforms like Respondent.

Use disqualifying logic on answers that don't fit your ideal participant criteria to remove them from consideration.

Add skip logic to specific questions to create a custom pathway through your screener. For example, include skip logic to move a potential participant to another question to clarify a point further or move them to the end of the screener if they chose a disqualifying answer.

Qualifying questions

Use qualifying questions to qualify and disqualify respondents.

Add Previously Used Questions

Pro Tip: How to use qualifying questions. [View article](#)

Q1

What gets you motivated in the morning?

Checkbox (Multi select)

Add batch answers

☒ Required

☐ Skip Logic

1.

A really great cup of coffee

May Select

2.

Music playing while I get ready to start my day

May Select

3.

I sleep in until noon, can't do mornings

Disqualify

4.

Exercising or doing Yoga

May Select

5.

Walking my dog

May Select

6.

I like mornings but I don't really need motivation

Disqualify

7. It's a good idea to test your screener survey thoroughly.

Walk through your screener or have coworkers take your survey. Test different paths to ensure skip logic is applied as you want.

A Quick Note about Technology

Unmoderated studies and usability tests often require participants to have access to a particular **unmoderated usability software or technology**. You may need to include a question to ensure participants can complete their tasks with available technology.

Consider whether you should include a question about the following:

- Will your participant have to download an app or software to participate?
- Does your participant need to perform their task on a computer or smartphone?
- Does your research require high-speed internet access or audio/video capability?

Best Practices for Creating a Dependable Screener Survey

- **Focus on behavioral, psychographic, and skills-based questions.**

Unless demographic criteria are essential for your study, focus on the behavioral questions that fit your ideal study participant qualities.

- **Avoid leading questions.**

Leading questions can bias a user's answer or guide participants into answering positively in hopes of getting chosen for research. For example, instead of "Are you a data scientist?", try "Which of the following best describes your current job role?" and provide a list of possible answers, including a data scientist option.

- **Write short, precise questions and provide clear answers that are distinct from each other.**

Help potential participants move efficiently through your screener with short, precise questions. Avoid vague language or jargon that can cause potential participants confusion about how to answer. Provide answers with discrete options, providing numbers for options rather than "often" or "rarely" to gather more accurate information.

- **Choose the proper order for your questions.**

Start broad and go specific. Place the most important criteria at the beginning. Use qualifying logic to disqualify participants from further questioning. You can use skip logic to progress to more detailed questions to gather additional information on a particular topic.

- **Camouflage qualifying answers in multiple choice questions**

Avoid leading a participant to guess a qualifying answer by providing several options. You can guide potential participants to "select all that apply" to collect accurate and thorough information.

- **Always include an alternative option as a catchall.**

Include an option of "other," "I'm not sure," or "none of the above" with multiple choice answers to gather more information. Doing so can help you avoid disqualifying participants who may be ideal or mistakenly qualifying a participant forced to choose an option that doesn't fit exactly.

- **Include open-ended questions to gather qualitative information.**

Open-ended questions can help you screen for a participant's ability to articulate and better gauge their experience level in specific areas.

- **Keep your screener as concise as possible.**

Include as few questions as possible to qualify and segment your participant responses accurately. Lengthy screeners can cause response fatigue, resulting in unfinished screeners and missed opportunities.

There is no absolute rule for how many questions are right for your screener. Include the questions that are necessary to hit all of your important criteria. However, we've found that screeners with between 5 and 10 questions have the most success in successfully qualifying participants for research.

Put Questions into Practice

Now that we've walked through the process of writing screener questions and reviewed the best practices to ensure successful recruitment, let's put it all together with the real estate example we explored earlier.

Participant Criteria	Sample Question	Type of Question
Is a sales professional	Which of the following best describes your current job role? (Please select the option that best describes you). A. Customer Service (Disqualify) B. Engineering (Disqualify) C. Human Resources (Disqualify) D. Sales (Qualify) E. Digital Marketing (Disqualify) F. Business Development (Qualify) G. Public Relations (Disqualify) H. Other (Please specify)	Single select
Currently uses your sales automation product	Which of the following products do you use weekly for work? A. Calendly (May select) B. Zoom (May select) C. Hubspot Sales Hub (Must Select) D. Salesforce (May select) E. Chorus (May select) F. Outreach (May select) G. Slack (May select)	Multi-Select
Lead scoring is a responsibility in their job role	Which of the following, if any, are tasks or responsibilities you have at your job? (Select all that apply). A. Cold sales prospecting (May select) B. Product demos (May select) C. Lead scoring (Must Select) D. Managing a team (May select) E. Quarterly account reviews (May select) F. Answering customer service requests (Disqualify) G. Providing product quotes (May select)	Multi-select
Works at an enterprise size company	To the best of your knowledge, how many people are employed at your company? A. 1-50 employees (Disqualify) B. 51-100 employees (Disqualify) C. 101-1,000 employees (Disqualify) D. 1,001-5,000 employees (Qualify) E. 5,001-10,000 employees (Qualify) F. 10,001 + employees (Qualify)	Single Select
Has ability to make decisions about software purchases	Which of the following best describes what your role is as it relates to selecting a software solution? (Please select all that apply) A. I am the final decision maker (Qualify) B. I drive the recommendation (Qualify) C. I assist in the evaluation (Qualify) D. I am an end user of the new solution (Disqualify) E. Other (please specify) (Disqualify)	Multi-select

Downloadable Questions

Ready to get started creating your next screener survey? We've compiled common questions broken down by criteria to get you started.

[DOWNLOAD SCREENER QUESTIONS](#)

