

Welcome to Product Talk #10

A quarterly preview of new features from the product team at User Interviews.

While we're waiting...



Introduce yourself in the chat

Share your name, role, and location



Use Q&A for questions

You can ask and upvote questions



Look out for several audience polls

We'd love your input

| Welcome to Product Talk



JH Forster
SVP, Product



Carol Guest
Sr. Director, Product



Katie Brattain
Sr. Manager of Design



Tucker Hutchinson
VP, Revenue

Scheduling 2.0

Automated scheduling
Team collaboration
Rescheduling

Flexible Incentives

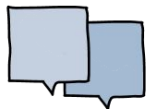
Edit individual and
project incentives

Participant Profiles

New data for Hub
Profile refresh

Hub Highlights

Zapier integration
Hub search
Email your hub panel



What are you most excited to hear about today?

While we're here: Set your chat to *Everyone* so everyone can see your responses.

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Scheduling 2.0: automated and collaborative scheduling

| Scheduling 2.0

Scheduling is hard, but critical for moderated research.



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| Scheduling 2.0

COMING SOON

Rules-based, automated scheduling. Simply sync your calendar and set your preferences and participants will be able to book any available times that fit your scheduling rules. *Coming soon for projects with a single moderator.*

The screenshot displays the Scheduling 2.0 interface. At the top, there are navigation buttons for '<', '>', 'Today', 'Month', 'Week', and 'Day'. The current date range is 'April 30 - May 6th, 2023'. Below this is a calendar grid with columns for 'Sun 4/30', 'Mon 5/1', 'Tue 5/2', and 'Wed 5/3'. The rows represent time slots from 'all-day' to '1pm'. An orange block labeled 'Mickey' is scheduled for 11am on Tue 5/2, 12pm on Mon 5/1, and 1pm on Tue 5/2. To the right of the calendar is a configuration panel with a 'Preview participant view' button and a close icon. The 'MANAGE SESSIONS' section includes a 'Scheduling type' dropdown menu currently set to 'Automatic'. A tooltip is open over the 'Automatic' option, containing the text: 'Automatic: Any available times that fit your scheduling rules will be available to participants.' and 'Manual: Click to define exact time ranges you would like participants to sign up for.' Below the tooltip are 'Start date' and 'End date' fields with calendar icons. The 'RULES AND LIMITS' section includes a 'Minimum scheduling notice' field set to '2' with a unit dropdown set to 'hours', and a 'Buffer time' field set to '10' with a unit dropdown set to 'minutes'.

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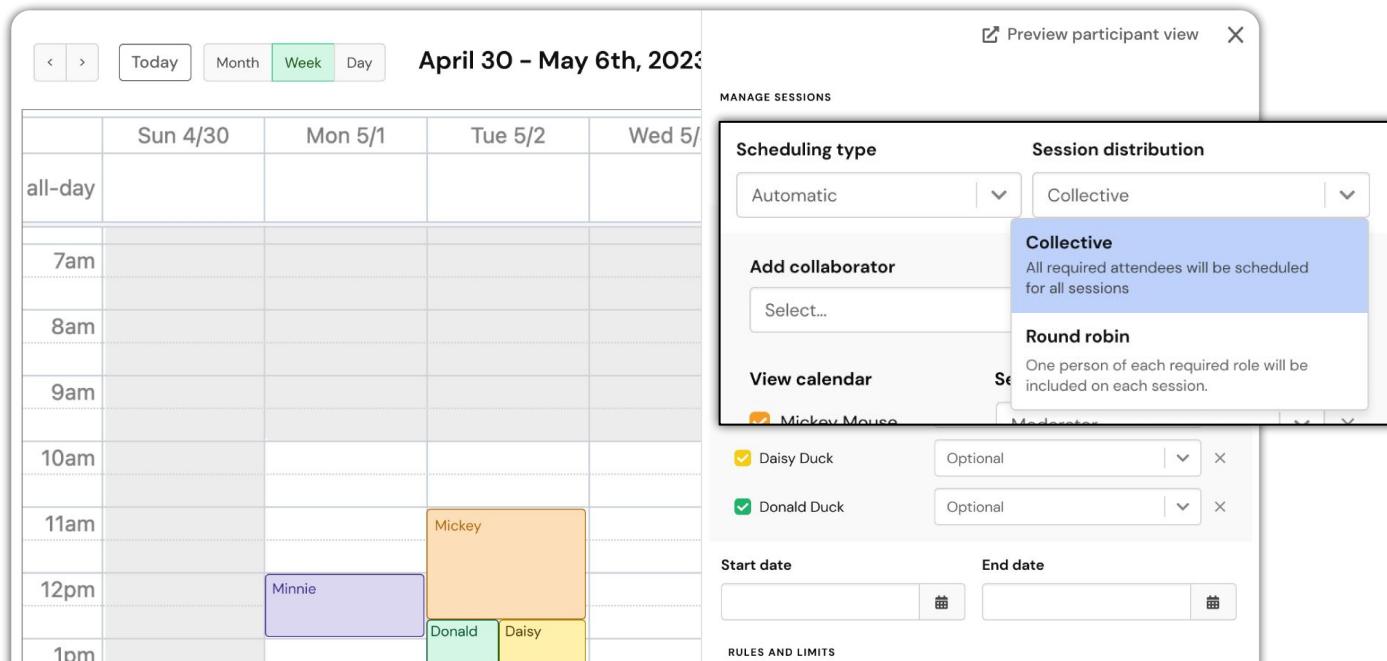
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Scheduling, purpose built for research. We're working on automated scheduling for groups of researchers, and exploring deeper collaboration features such as options for collective or round robin session distribution, and collaborator roles.



The screenshot displays the Scheduling 2.0 interface. On the left is a calendar view for the week of April 30 to May 6, 2023. The calendar shows sessions for Mickey Mouse (orange), Minnie (purple), Donald Duck (green), and Daisy Duck (yellow). On the right is the 'MANAGE SESSIONS' dialog box, which includes a 'Preview participant view' link, a 'Scheduling type' dropdown set to 'Automatic', and a 'Session distribution' dropdown set to 'Collective'. A dropdown menu is open under 'Session distribution', showing 'Collective' (selected) and 'Round robin'. Below this are 'Add collaborator' and 'View calendar' sections. The 'Add collaborator' section lists Mickey Mouse, Daisy Duck, and Donald Duck with checkboxes and dropdown menus. The 'View calendar' section shows a calendar icon. At the bottom, there are 'Start date' and 'End date' fields with calendar icons, and a 'RULES AND LIMITS' section.

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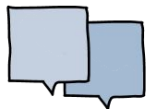
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In your last moderated research project, who on your team attended the sessions and what roles did everyone play?

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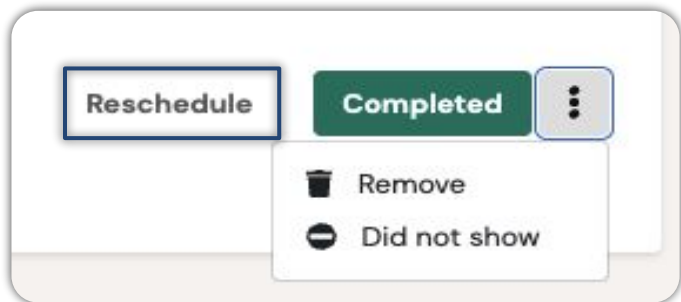
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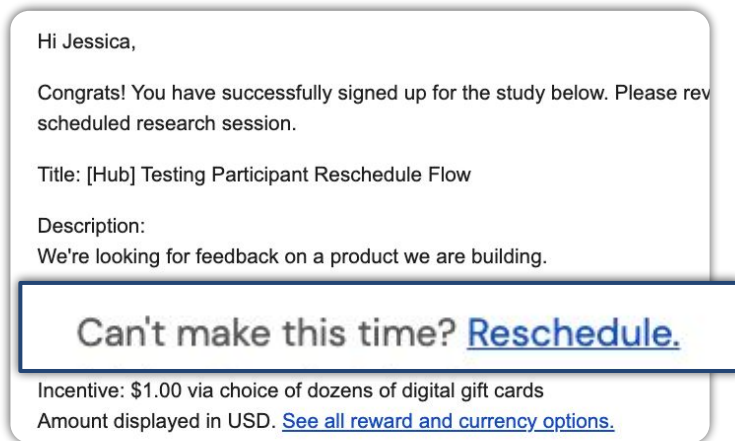
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Reschedule participants with ease. Make sure you connect with your most qualified participants. Participants can reschedule sessions should a conflict arise. Researchers can connect with participants they might have missed, and marked as a no show..

Reschedule any participant



Participants can reschedule themselves



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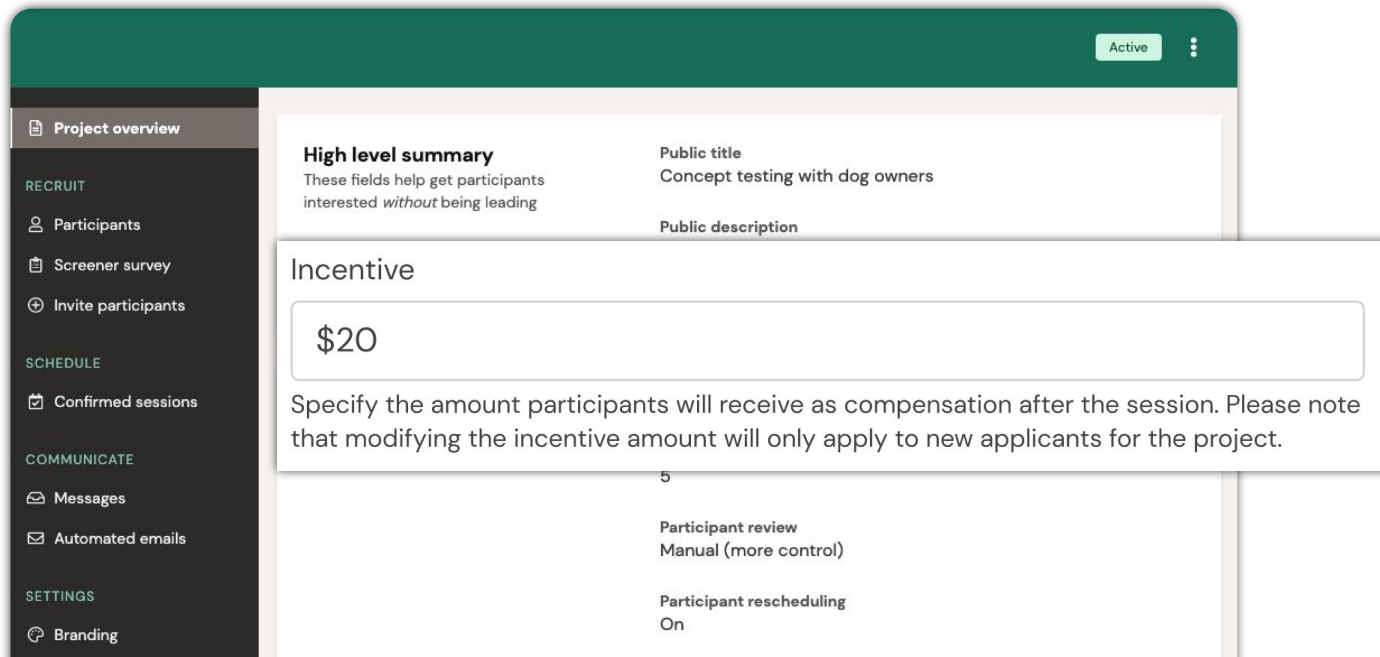
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Flexible Incentives: Editing incentives after project launch

Adjust the incentive for a project. Not getting the number of applications you need? Learn and adjust as you go by increasing the incentive amount to attract more candidates.



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Adjust the incentive for an individual. Have a great participant on the line that you want to dive a little deeper with? If your conversation goes long, offer them a bonus for their time.

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Participant tracking

23 /300 by November 19, 2023


[Edit](#)

Approved (250) **Started (75)** Submitted response (18) Completed study (5) Removed from study (1)

Participant ▾ Started date ▾ Incentives ▾

 **Janis Leuschke**
Product Web Coordinator 11/8/22 @ 10:19 pm EDT \$50

 **Gilberto Renner**
Product Data Developer 11/8/22 @ 10:19 pm EDT \$50

 **Mary Weber**
Central Division Architect 11/8/22 @ 10:19 pm EDT \$50

 **Tracy Nikolaus**
National Optimization Developer 11/8/22 @ 10:19 pm EDT \$50

 **Deborah Botsford**
11/8/22 @ 10:19 pm EDT \$50

✓ Complete & pay

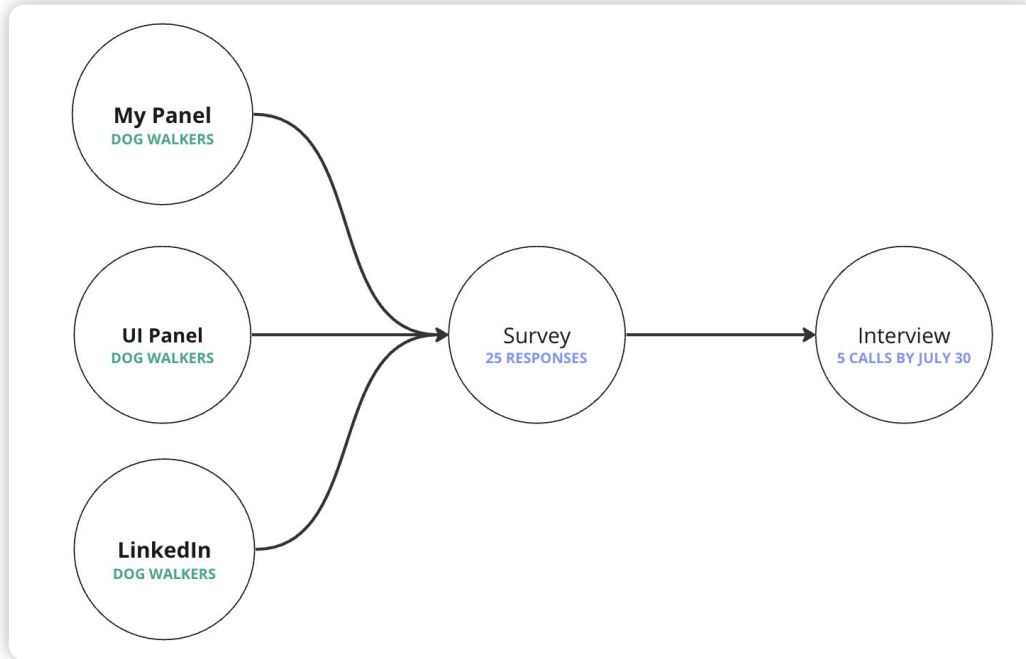
🚩 Report

⊖ Remove

\$ Edit incentive

| Flexible Incentives

Beyond incentives—supporting flexible research: On the horizon are bigger updates to make our recruitment workflow flex to support various kinds of research.



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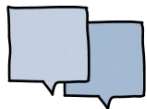
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Poll: Which of these research practices does your team typically use?

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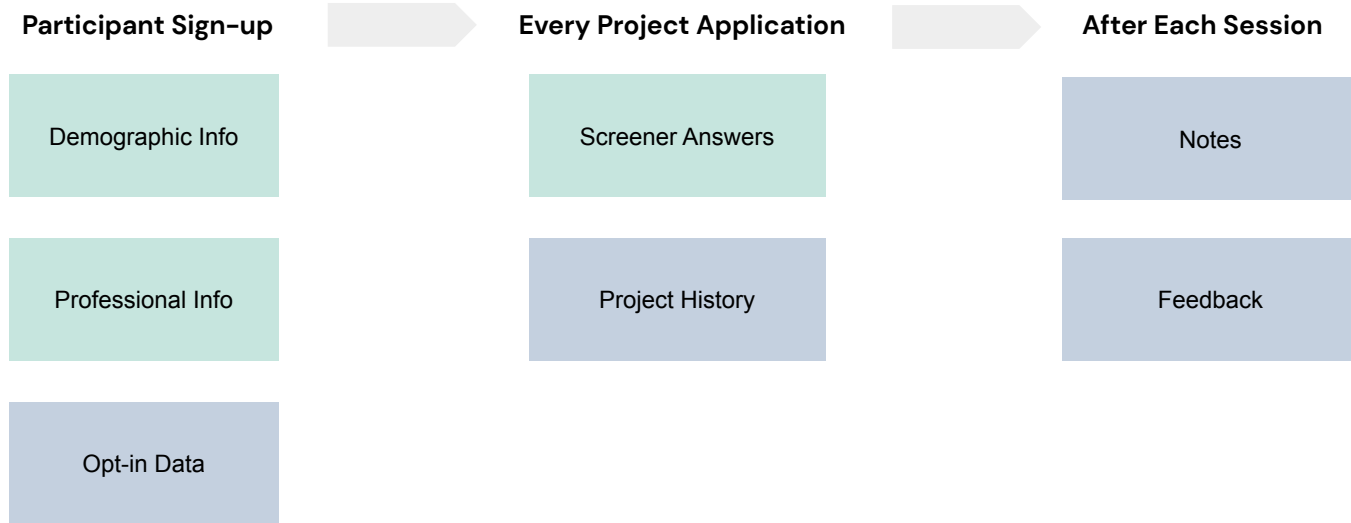
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Redesigned participant profiles

| Redesigned participant profiles

Access all the user data you need to make the right recruiting decisions.



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| Redesigned participant profiles

LAUNCHED

Complete participant profiles for Hub projects: You can now access your participants' full set of profile data and project history directly within your Hub projects.

LR Lena Roberts

Overview

Screener Survey

Participant data

Sessions

No rating

Message participant

5

INVITES

3

APPLICATIONS

2

COMPLETIONS

10/02/2021

LAST COMPLETED

Custom info

Product usage	Disney+, Netflix, HBO Max
Preferred browser	Google Chrome
Favorite color	Purple
Favorite movie	Ratatouille
Available to invite	Yes

Show 13 hidden fields

General info

Last invited date	11/05/2022
Last applied date	11/21/2022
Date added	04/15/2019
Feedback rating	Great
Incentives earned	\$120.10
First source	CSV
Unsubscribed	No
Opt-in form history	HBO Max users

Project history

JANUARY 2023

Team enablement concept testing
1-on-1 interview Completed

OCTOBER 2022

Historical product usage long-term study
Multi-day study Did not show

JUNE 2022

Discovery interviews with frequent users
1-on-1 interview Applied



NOVEMBER 2021

Unmoderated test with new users
Unmoderated study Completed

| Redesigned participant profiles COMING SOON

Universal upgrades to participant profiles: A fresh new design is coming soon to both Hub and Recruit participant profiles.

The screenshot shows a user profile for Lena Roberts. At the top left is a share icon, and at the top right is a close icon. The profile features a green circular avatar with the initials 'LR'. To the right of the avatar, the name 'Lena Roberts' is displayed, followed by her email 'lenaroberts3@gmail.com', phone number '+1 555 555 5555', and location '(-6:00) America / Chicago'. There are two icons on the right: a person icon with a dropdown arrow and an envelope icon. Below the profile information is a navigation bar with four tabs: 'Overview' (selected), 'Screener', 'Characteristics', and 'Sessions'. The main content area is titled 'Participant overview' and contains the following information:

Status	Match percentage
Qualified	100% match
Date applied	Contact info
April 25, 2023	lenaroberts3@gmail.com
Social media connections	Location
 	Chicago
Linkedin profile	
in/lena-roberts-b48c65162/	

Below this section is a 'Key characteristics' section, which has a green checkmark icon, the number '2', and a dropdown arrow. The first two items listed are 'Job title' and 'Browsers', both with green checkmark icons.

| Redesigned participant profiles

Looking further ahead, we're exploring bringing feedback and notes left by your teammates into the profile view, so you can access all the info you need to make the right recruiting decisions.



Lena Roberts

lenaroberts3@gmail.com

+1 555 555 5555

(-6:00) America / Chicago



design-team x

Overview

Project history

Notes

RB

Rafael Baker left a note • May 2, 2023 at 11:55am

Lena gave really thoughtful responses to all the questions that I asked her. She also mentioned that she is a UX Researcher not a Research Ops coordinator. She may be a good candidate for our UX Research discovery study coming up in July. [@Thomas Frost](#) you may want to consider inviting her to your next study!

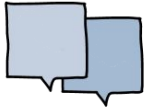
AS

Alex Smith left a project note • May 2, 2023 at 11:55am

This participant isn't a great fit for this specific study but could be a good fit for some upcoming research that we are doing. Follow up with this participant in 3 months.

PROJECT

[Understanding Research Ops Mental Models](#)



Poll: What other data would be most valuable to add to participant profiles?

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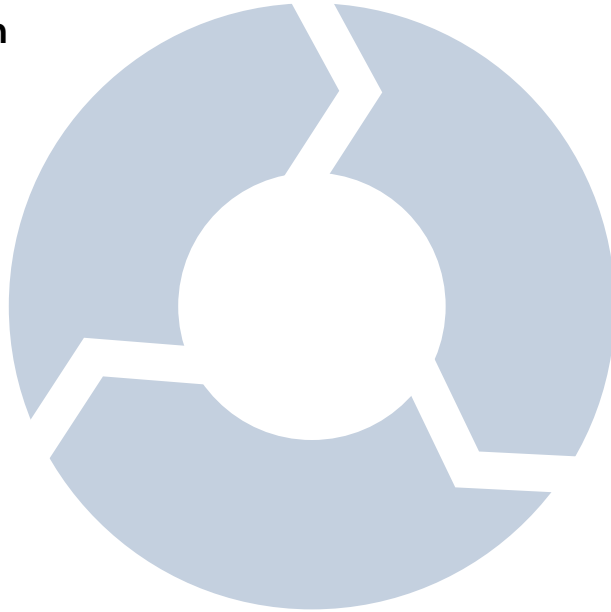
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Build and engage your panel with Hub

| Build and engage your panel with Hub

3. Connect with participants to learn more and engage them in future research



2. Select your ideal research candidates and invite them into studies

1. Build your list of participants with all the data you need

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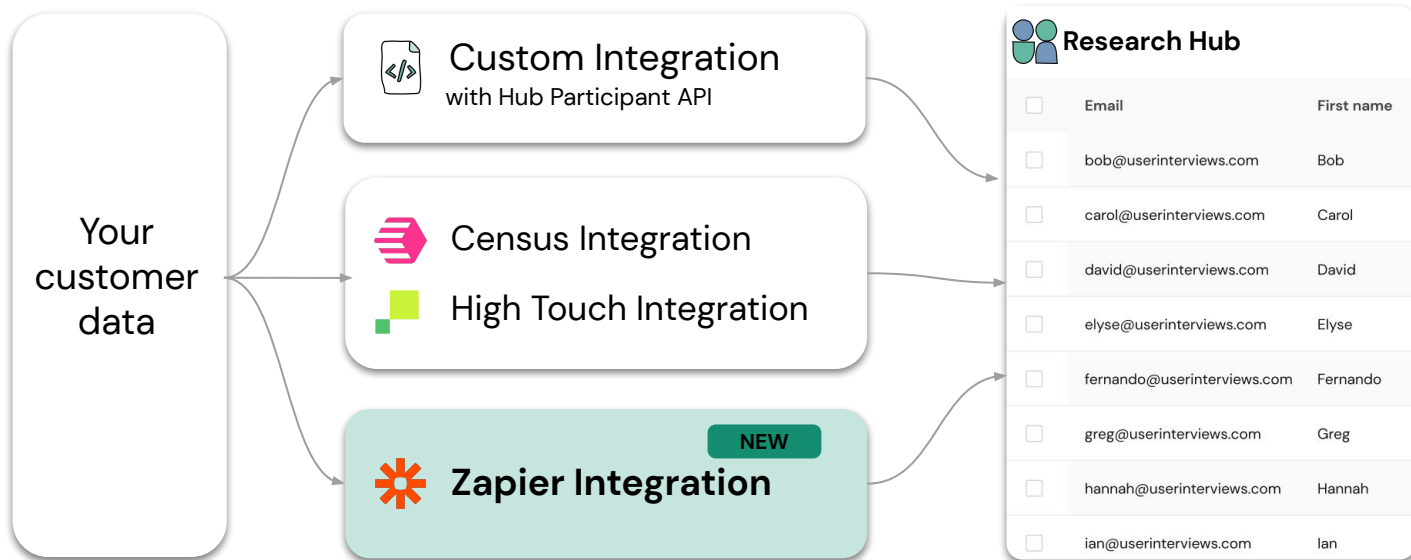
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LAUNCHED

Build your panel faster with Zapier. No code, no problem. Our Zapier integration makes it easy to push useful customer data from Salesforce, Hubspot, and 5,000+ other tools into Hub for more sophisticated targeting and segmentation.



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LAUNCHED

Zapier is now available for all Hub customers, including Free Forever, Essential, Premium, and Enterprise tiers.

To get zapier, visit www.userinterviews.com/hub-api



user interviews

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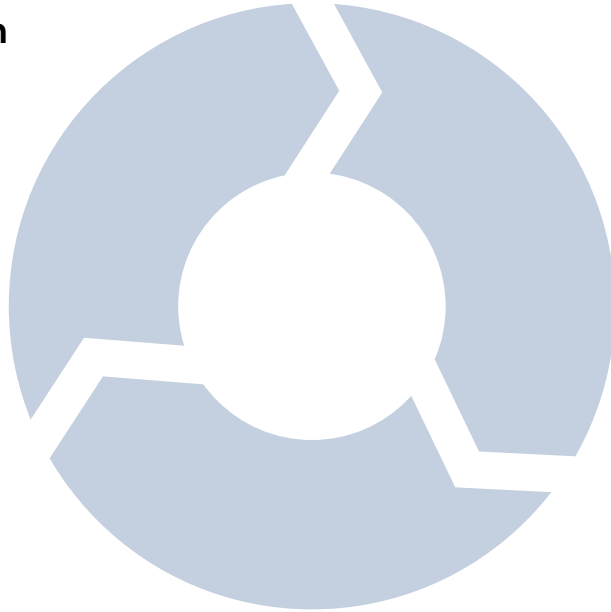
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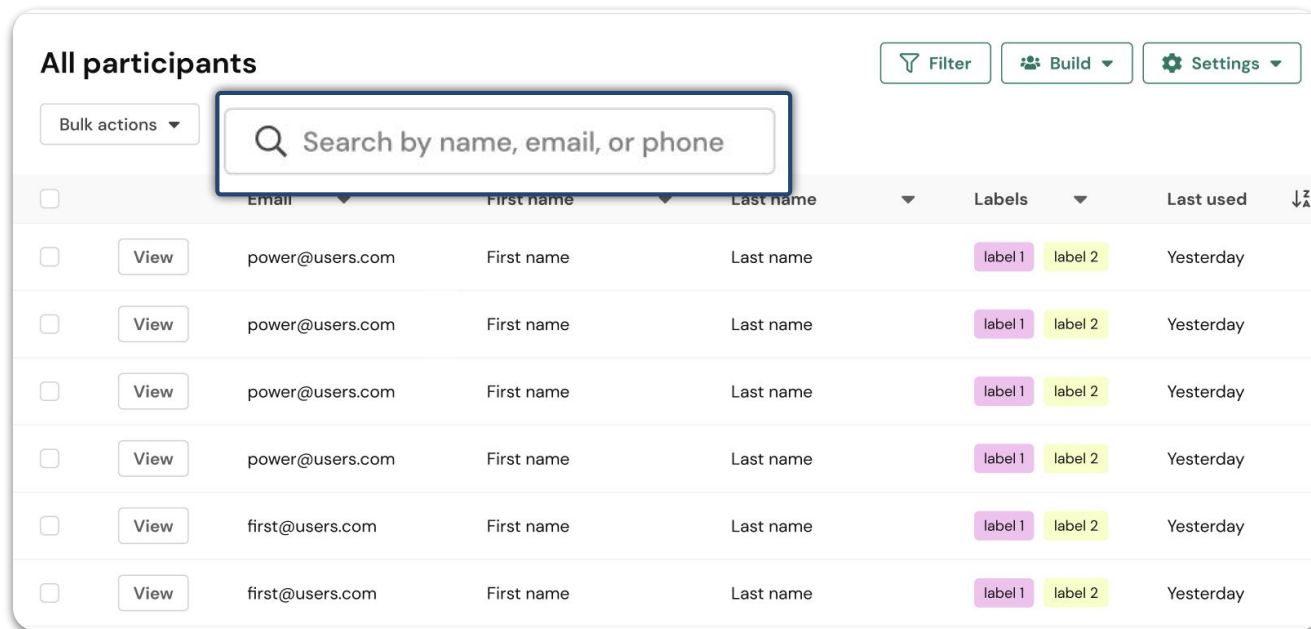
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COMING SOON

Find participants faster with Hub search. We'll be introducing a global search bar to the Hub database so you can quickly find participants by name or basic information.



The screenshot displays the 'All participants' interface. At the top left, there is a 'Bulk actions' dropdown menu. To its right is a search bar with a magnifying glass icon and the placeholder text 'Search by name, email, or phone'. Further right are three buttons: 'Filter' (with a funnel icon), 'Build' (with a group icon and a dropdown arrow), and 'Settings' (with a gear icon and a dropdown arrow). Below these elements is a table with the following columns: 'Email', 'First name', 'Last name', 'Labels', and 'Last used'. The table contains six rows of participant data. Each row has a checkbox on the left and a 'View' button. The 'Labels' column shows two labels, 'label 1' and 'label 2', for each participant. The 'Last used' column shows 'Yesterday' for all participants.

	Email	First name	Last name	Labels	Last used
<input type="checkbox"/>	power@users.com	First name	Last name	label 1 label 2	Yesterday
<input type="checkbox"/>	power@users.com	First name	Last name	label 1 label 2	Yesterday
<input type="checkbox"/>	power@users.com	First name	Last name	label 1 label 2	Yesterday
<input type="checkbox"/>	power@users.com	First name	Last name	label 1 label 2	Yesterday
<input type="checkbox"/>	first@users.com	First name	Last name	label 1 label 2	Yesterday
<input type="checkbox"/>	first@users.com	First name	Last name	label 1 label 2	Yesterday

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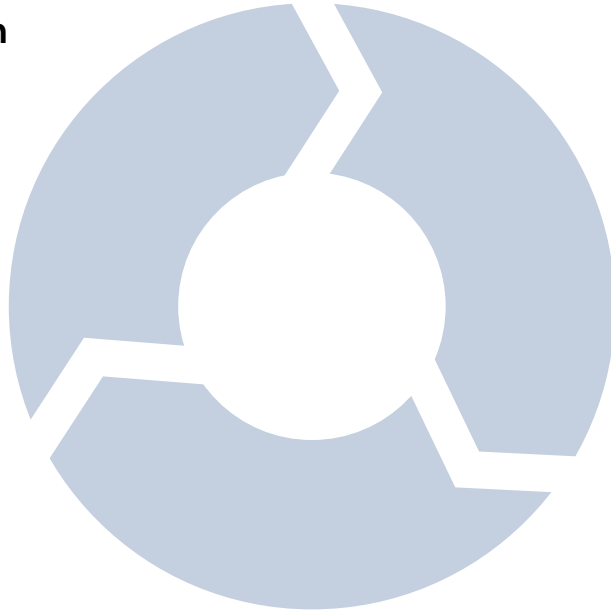
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Build and engage your panel with Hub COMING SOON

Communicate regularly with your Hub population to keep them engaged. Send emails about research initiatives to segments of your panel, without needing to create a project.

VIPs

Bulk Actions ▾

✓	Action	Email
✓	View	yeoh.m@everythingeverywh
✓	View	g.d.torro@pinnocchio.com
✓	View	b.fraser@thewhale.com
✓	View	m.m.keeravani@rrr.com
✓	View	e.berger@allquiet.com
✓	View	j.friend@allquiet.com
✓	View	j.l.curtis@everythingeverywh
✓	View	quank.y@allatonce.com

13 selected Select all 13 participants

Compose email for (13) participants ✕




Create an email to send to your selected participants. Messages will use the default branding found in your team settings. This email will be sent to **each participant individually**.

Selected participants: ⓘ
Michelle Yeoh; Guillermo del Torro; Brenden Fraser; Marakathamani Keeravani; Edward Berger; James Friend; + 7 more

Sender profile (From): ⓘ
Star Research Labs (research@starlabs.com) ▾

Subject line:

Message:

B I   


Hi from Company X!
If you are reading this you participated in a study to help us make improvements to our by testing out a feature. We appreciate all the feedback and wanted to send you an update on progress.


We are currently in the process of refining the feature and working out some of the bugs. We are looking to have this feature available within the next couple of month!

Send me preview Cancel Send bulk email

24 of 3,621

New feature update! Coming June 2023!! Inbox x Updates x

 **Star Research Labs** <research@starlab.com> May 30, 2023, 2:46 PM (3 days ago) ☆ ↶



Company X

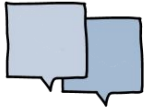
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If you are reading this you participated in a study to help us make improvements to our by testing out a feature. We appreciate all the feedback and wanted to send you an update on progress.

We are currently in the process of refining the feature and working out some of the bugs. We are looking to have this feature available within the next couple of month!

Best,
Jill

[Unsubscribe](#)



Poll: What are the biggest challenges with building and engaging your participant panel today?

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Thank You

We'll send the deck, recording, and write up shortly.

See you in September for Product Talk #11!