

Welcome to Product Talk #12

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

Ask and upvote questions



Look out for several audience polls

We'd love your input

| Welcome to Product Talk



Carol Guest
Sr. Director,
Product Management



Claire Mai
Product Manager



Zoe Nagara
Sr. Director,
Product Marketing

Top 5 New Features

Top 6 Coming Soon

Unified Workspace

2024 Sneak Peek

Top 5 New Features

Top 6 Coming Soon

Unified Workspace

2024 Sneak Peek



Chat: What are you most excited to hear about today?

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

Top **5** Recent Launches

| ① Activity & Spend Reporting

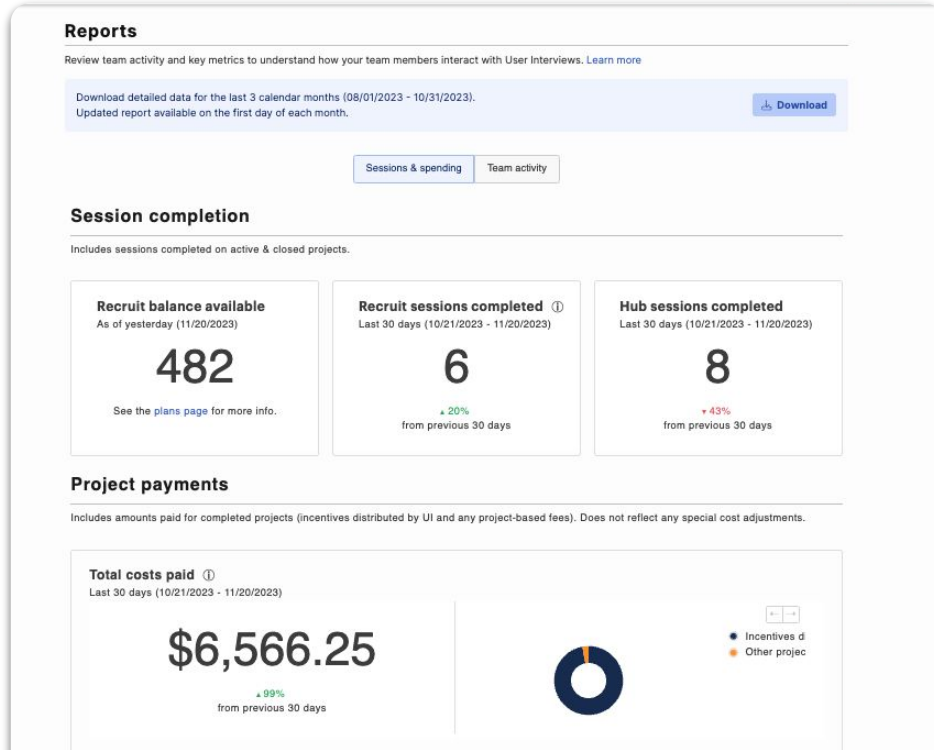
Better visibility into usage and spend. Gain insight into the research happening at your organization with reporting on sessions, team member activity, and spending in UI.

Top 5 New Features

Top 6 Coming Soon

Unified Workspace

2024 Sneak Peek



2 Bulk Enter Screener Questions

Build screeners faster with updated multiple-choice questions. Researchers can bulk enter answer options and drag and drop answer choices. Participants can write in an “Other” option.

Page 1

What is your favorite fruit?

Pick One

Accept

Accept

Accept

Required
 Add “Other” option
 Key screener question

Add new question

Add skip logic

Top 5 New Features

Top 6 Coming Soon

Unified Workspace

2024 Sneak Peek

3 Team Session Attendance

Coordinate your team with session attendance. Designate who must attend and who is optional, so you can find times that work for the team and schedule only those that need to be there.

The screenshot shows a calendar interface with a 'Scheduling type' dropdown set to 'Manual'. A modal window is open, detailing attendance options:

- Moderator**: They will own session location links and calendar invites. Use their connected calendar to determine availability.
- Required**: They will be invited to all sessions. Use their connected calendar to determine availability.
- Optional**: Do not consider their availability. They will receive invites to all sessions.
- Not included**: Do not schedule around their availability and do not invite to sessions.

At the bottom of the modal, there is a checkbox labeled 'Let the participant know where the session will take place,' which is currently unchecked.

Top 5 New Features

Top 6 Coming Soon

Unified Workspace

2024 Sneak Peek

| 4 Shared Balances & Payment Defaults

Ensure your team is set up with the right payment methods. Give access to prepaid balances and designate your primary payment method (invoice, credit card, prepaid balance) so all team members can launch projects without making payment decisions.

Prepaid balance ID: 1236754

DETAILS	AVAILABLE BALANCE
Balance owner: [balance owner name]	\$2,500.00
Recruitment fee discount: 3%	

Share with team

Share access and make this payment method available to everyone on your team.

Available payment methods

Manage which payment methods can be selected by your team at project launch. At least one payment method must be enabled.

Prepaid balance (3) Default

Enabling this option will allow this payment method to be used by team members with access. Share

Top 5 New Features

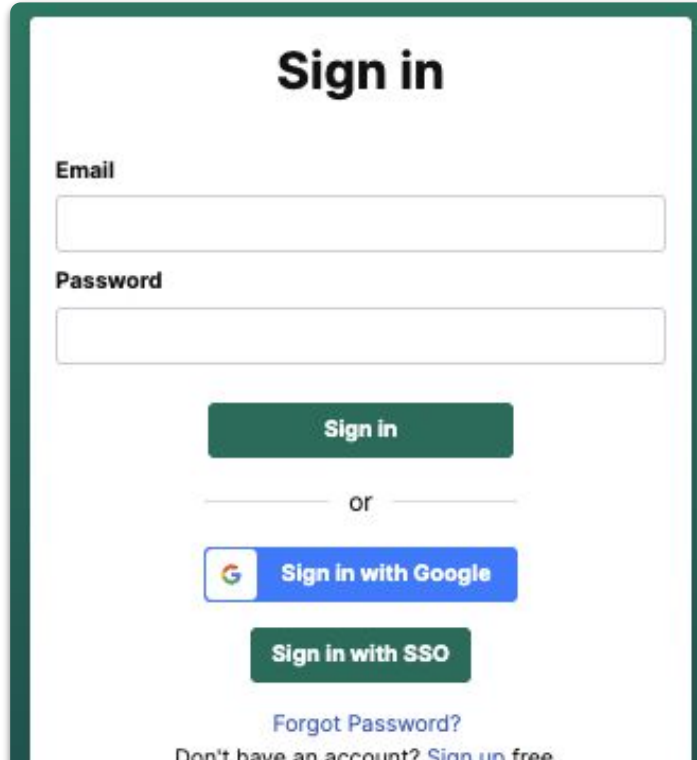
Top 6 Coming Soon

Unified Workspace

2024 Sneak Peek

| 5 Simple SSO Sign-in

Guide researchers to SSO sign-in. Researchers can navigate directly to your identity provider through User Interviews.




Sign in

Email

Password

Sign in

or

 **Sign in with Google**

Sign in with SSO

[Forgot Password?](#)

[Don't have an account? Sign up free](#)

Top 5 New Features

Top 6 Coming Soon

Unified Workspace

2024 Sneak Peek

Top 5 New Features

Top 6 Coming Soon

Unified Workspace

2024 Sneak Peek



Chat: Have you used any of these features? What's working?
What's missing?

 user interviews

Top **6** Coming Soon

1 New Primary Navigation

COMING SOON

New navigation and global styles. Left navigation and updated colors or a refreshed User Interviews going into 2024. ✨

The screenshot displays the 'Projects' page in the User Interviews application. On the left is a dark sidebar with navigation options: 'user interviews', 'Projects', and 'Participants'. The main content area is titled 'Projects' and includes filters for 'All (14)', 'Draft (0)', 'Active (2)', 'Pending close (1)', and 'Completed (11)', along with 'Templates (0)' and 'Filters (2)'. A large '+ Create a new project' button is centered. Below, two project cards are shown. The first card, 'New Nav - Moderated Sessions', is 'Active' and includes a 'Mark as template' link, a 'Manage' button, and a 'Duplicate' button. It features a progress bar with the following data:

Requested	Qualified	Approved	Scheduled	Completed
10	0	0	1	1

The second card, 'Hub Biggest Fans & Power Users', also includes a 'Mark as template' link.

Top 5 New Features

Top 6 Coming Soon

Unified Workspace

2024 Sneak Peek

2 New Screener Question Types

COMING SOON

Grid questions. Grid questions make programming screeners even faster for researchers and make it easier for participants to differentiate between similar questions.

Page 1

Pick Any - Grid

	Column value	Column value	Column value
Row value	May Select	May Select	May Select
Row value	May Select	May Select	May Select
Row value	May Select	May Select	May Select

+ Add row + Add column

Required Key screener question

Add new question Add skip logic

Top 5 New Features

Top 6 Coming Soon

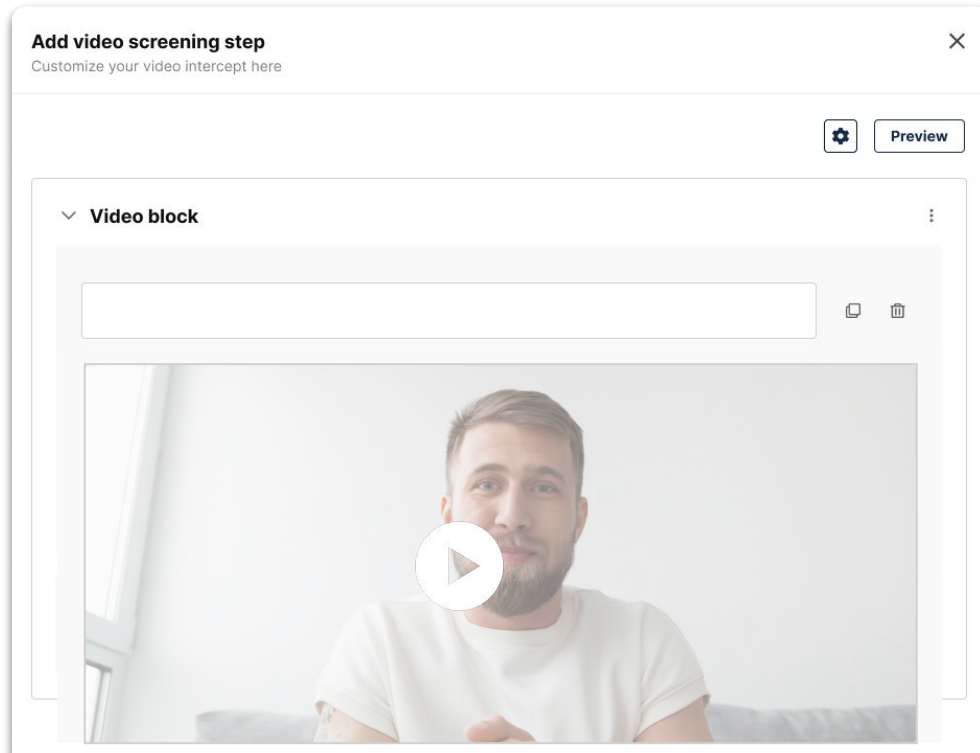
Unified Workspace

2024 Sneak Peek

3 New Screener Question Types

COMING SOON

Video screeners. With video screeners, participants upload a video of themselves answering a specific question, the fastest insight into their experience on the topic.



Top 5 New Features

Top 6 Coming Soon

Unified Workspace

2024 Sneak Peek

4 Team Auto-Scheduling

COMING SOON

Automate scheduling for your team. Connect your calendars, set preferences, set roles, and leave the rest to us. We'll find time slots that suit the team and handle calendar invites and reminders.

Calendar interface showing a weekly view from April 30 to May 6th, 2023. The calendar displays sessions for Mickey (11:00am - 1pm), Minnie (12:00pm - 1:00pm), and Daisy (1:00pm - 1:30pm). A settings panel on the right shows 'Scheduling type' set to 'Automatic' and 'Session distribution' set to 'Manual'. A tooltip explains the 'Automatic' and 'Manual' options. Below the tooltip, there are checkboxes for 'Daisy Duck' and 'Donald Duck', and options to 'Invite collaborators to confirmed sessions' and 'Show unconfirmed sessions on my calendar'.

Top 5 New Features

Top 6 Coming Soon

Unified Workspace

2024 Sneak Peek

Recruit participants in India. We've expanded our international panel to include 70,000+ participants in India, so you can reach more perspectives around the world.

Location characteristics

Select a location type to recruit from

Country



Recruit from

 India



[+ Add another country](#)

Top 5 New Features

Top 6 Coming Soon

Unified Workspace

2024 Sneak Peek

6 Hub segment permissions

COMING SOON

Hub segment permissions. Organize segments into shared resources & private segments. Lock down important segments to prevent unauthorized edits.

The image shows a user interface for managing segment permissions. On the left, a sidebar lists various segments: 'Product/UXR Team', 'All participants', 'Shared', 'Monthly subscribers', 'Power users', 'VIPs', 'Private', 'Sav Test Segment', and 'Participants for my study'. A 'Hub panel' dropdown is visible above the list. The main area shows a table of participants for the 'All participants' segment, with columns for checkboxes, 'View' buttons, and names (e.g., 'frank').

The 'Edit Segment Permissions' dialog box is open, showing the following options:

- Anyone at User Interviews**: Can view (dropdown)
- Add individual researchers or groups**: Search input field with placeholder 'Add people and groups'
- People with access**:
 - Michael: Can edit (dropdown)
 - Janet: Can edit (dropdown)
 - Max: Can edit (dropdown)

Buttons for 'Cancel' and 'Save' are at the bottom right of the dialog.

Top 5 New Features

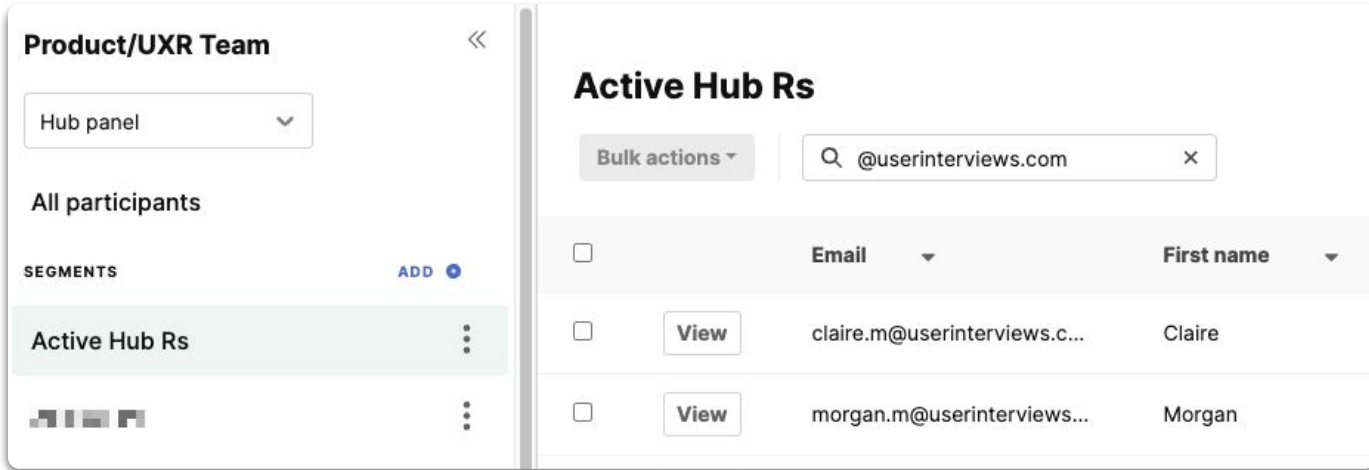
Top 6 Coming Soon

Unified Workspace

2024 Sneak Peek

| Bonus: Hub search within segments LAUNCHED

Search for participants within a segment. Use name, email, or phone number to search for Hub participants within the context of a segment or filter.



The screenshot shows the 'Product/UXR Team' workspace. On the left, a sidebar lists segments, with 'Active Hub Rs' selected. The main area displays the 'Active Hub Rs' segment with a search bar containing '@userinterviews.com'. Below the search bar is a table of participants.

<input type="checkbox"/>	Email	First name	
<input type="checkbox"/>	View	claire.m@userinterviews.c...	Claire
<input type="checkbox"/>	View	morgan.m@userinterviews...	Morgan

Top 5 New Features

Top 6 Coming Soon

Unified Workspace

2024 Sneak Peek



Poll: Which upcoming features seem most valuable to you or your team?

 user interviews

Unified Project Workspace

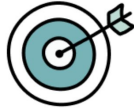
| Unified Project Workspace

We believe that researchers have four important needs when running research projects. We completely redesigned the project setup process and workspace in User Interviews to support these needs.



Fast

Researchers have a sense of urgency



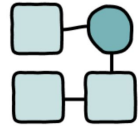
Predictable

Researchers want to know what to expect



Collaborative

Researchers want research to be a team sport



Flexible

Researchers have a wide variety of research approaches

| Unified Project Workspace

The screenshot shows a web interface for a project titled "Projects / Focus Group In Person" with a "Launched" status. A left sidebar contains navigation icons for a home page, a document, and a person. The main content area has a "Research design" tab selected, with "Participant management" as a sub-tab. Below this, there are four status indicators: "Recruitment" (checked), "Research activity" (checked), "Participant number & incentives" (checked), and "Participant communications" (checked). The "Recruitment" section is expanded, showing "Select participant source" with the instruction "Recruit from the User Interviews panel or from your own panel". Two options are listed: "User Interviews panel" (selected) with the description "Target and find customers or professionals using UI's Recruit panel", and "Your own users and panel" with the description "Find the right users from your team's panel, managed with Research Hub, or upload a CSV". Below this is a "Recruitment Criteria" section with a box containing the text "No specific criteria selected" and "Recruiting from the general population", and a "View" button.

Projects / **Focus Group In Person** ⓘ Launched

Research design Participant management

✓ **Recruitment** ✓ Research activity ✓ Participant number & incentives ✓ Participant communications

Select participant source
Recruit from the User Interviews panel or from your own panel

- User Interviews panel
Target and find customers or professionals using UI's Recruit panel
- Your own users and panel
Find the right users from your team's panel, managed with Research Hub, or upload a CSV

Recruitment Criteria

No specific criteria selected

Recruiting from the general population [View](#)

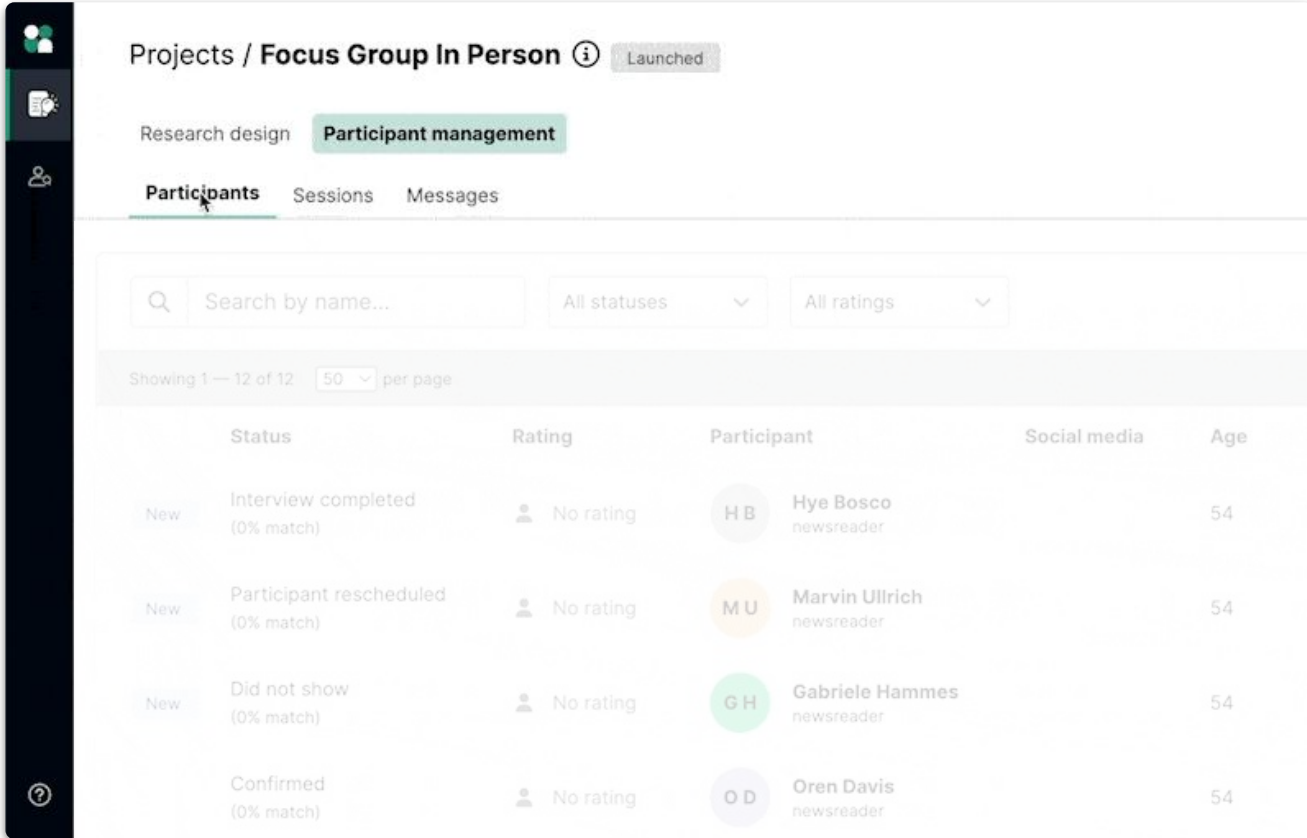
Top 5 New Features

Top 6 Coming Soon





Unified Workspace

2024 Sneak Peek

| Unified Project Workspace



The screenshot displays the 'Unified Project Workspace' interface. At the top, it shows the project name 'Projects / Focus Group In Person' with a status of 'Launched'. Below this, there are navigation tabs for 'Research design' and 'Participant management', with the latter being the active tab. Under 'Participant management', there are sub-tabs for 'Participants', 'Sessions', and 'Messages'. A search bar is present with the text 'Search by name...'. To the right of the search bar are two dropdown menus: 'All statuses' and 'All ratings'. Below the search bar, it indicates 'Showing 1 — 12 of 12' and '50 per page'. The main content is a table with the following columns: Status, Rating, Participant, Social media, and Age. The table lists four participants, each with a 'New' status and a '0% match' rating. The participants are Hye Bosco, Marvin Ullrich, Gabriele Hammes, and Oren Davis, all identified as 'newsreader' and aged 54.

Status	Rating	Participant	Social media	Age
New	Interview completed (0% match)	No rating	 Hye Bosco newsreader	54
New	Participant rescheduled (0% match)	No rating	 Marvin Ullrich newsreader	54
New	Did not show (0% match)	No rating	 Gabriele Hammes newsreader	54
Confirmed	(0% match)	No rating	 Oren Davis newsreader	54

Top 5 New Features

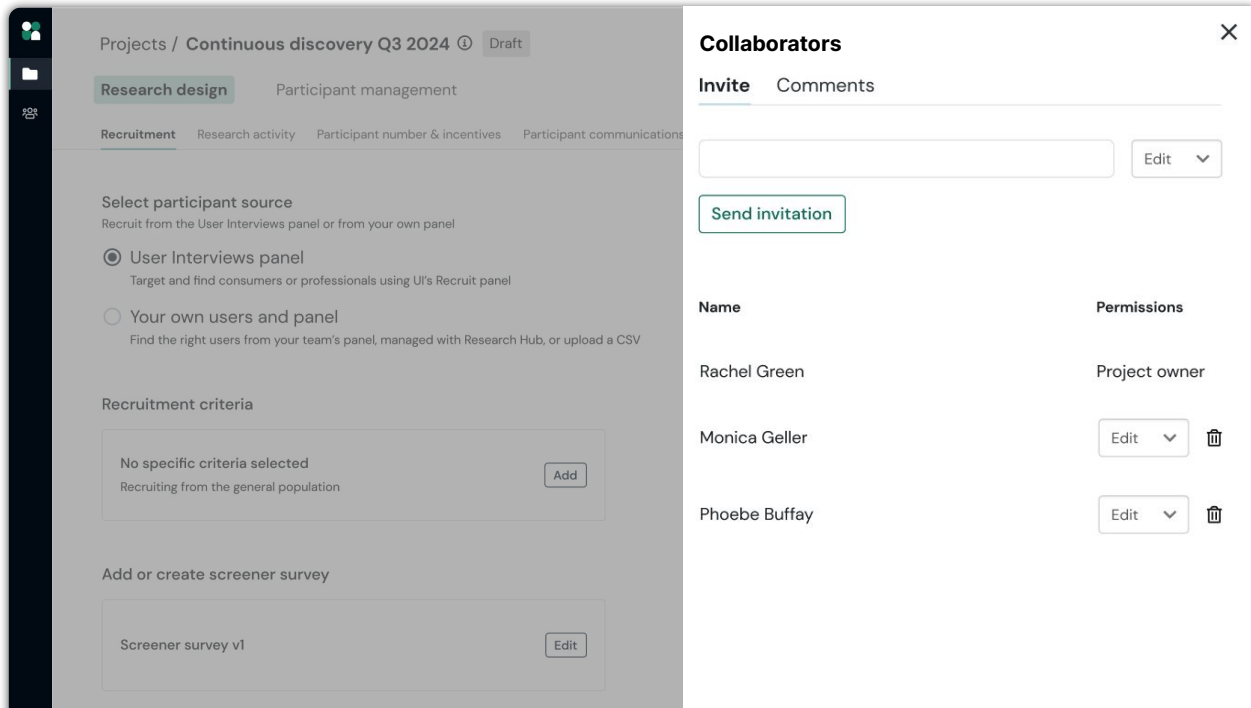
Top 6 Coming Soon

Unified Workspace

2024 Sneak Peek



| Unified Project Workspace

Built-in collaboration in from the start: Invite collaborators to be part of the research design process and to participate in research sessions. Research leaders can support their team with comments and suggestions.



The screenshot displays the 'Unified Project Workspace' interface. The main content area is titled 'Projects / Continuous discovery Q3 2024' and is in a 'Draft' state. It features a 'Research design' tab and a 'Participant management' sub-tab. Below this, there are several sections: 'Recruitment' (with sub-tabs for 'Recruitment activity', 'Participant number & incentives', and 'Participant communications'), 'Select participant source' (with options for 'User Interviews panel' and 'Your own users and panel'), 'Recruitment criteria' (with a box for 'No specific criteria selected'), and 'Add or create screener survey' (with a box for 'Screener survey v1').

Overlaid on the right is a 'Collaborators' modal window. It has a close button (X) in the top right corner. The modal is divided into two tabs: 'Invite' (selected) and 'Comments'. Below the tabs is a text input field with an 'Edit' dropdown menu and a 'Send invitation' button. Below this is a table of collaborators:

Name	Permissions
Rachel Green	Project owner
Monica Geller	Edit 
Phoebe Buffay	Edit 

Top 5 New Features

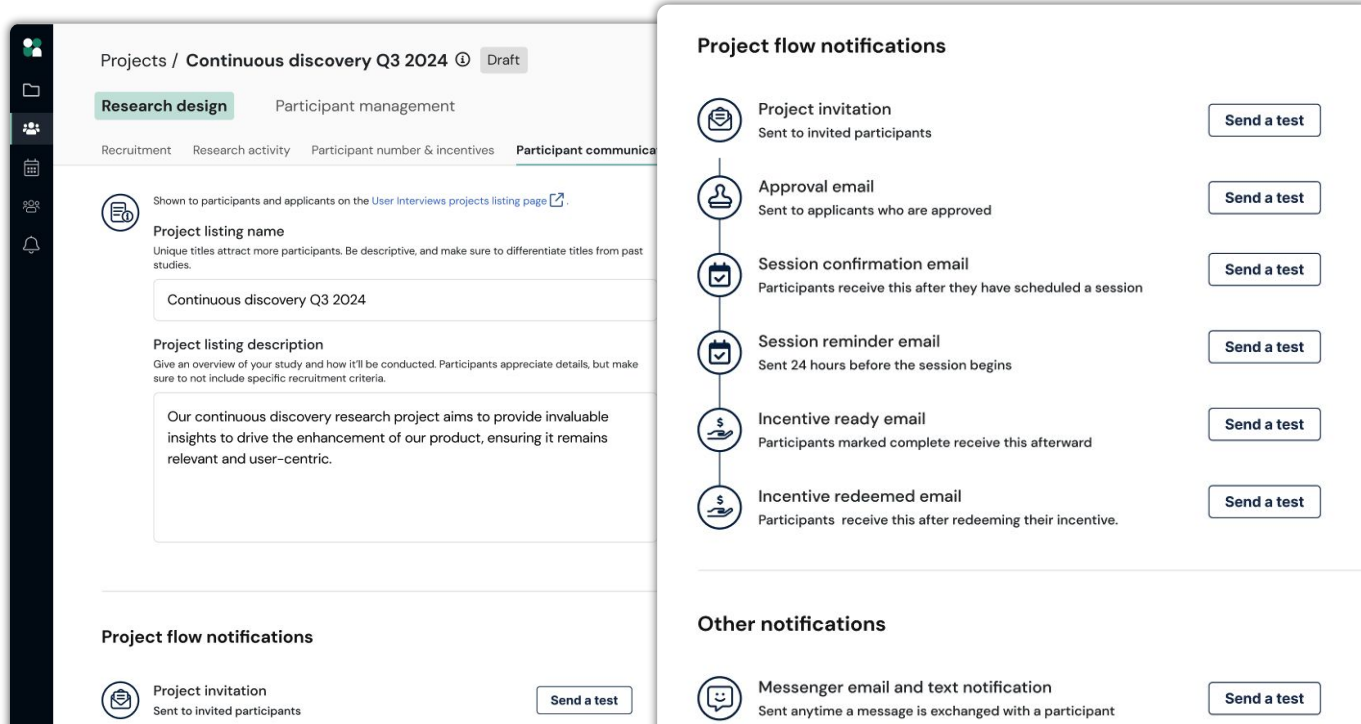
Top 6 Coming Soon

Unified Workspace

2024 Sneak Peek

| Unified Project Workspace

More visibility and control of the participant experience. For projects you run with your own users (using research hub or via CSVs) you'll be able to review and edit all of your participant touch points before you launch.



The screenshot displays the 'Unified Project Workspace' interface for a project titled 'Continuous discovery Q3 2024' in a 'Draft' state. The interface is divided into several sections:

- Project Settings:** Includes tabs for 'Research design', 'Participant management', 'Recruitment', 'Research activity', 'Participant number & incentives', and 'Participant communication'. The 'Project listing name' is 'Continuous discovery Q3 2024' and the 'Project listing description' is 'Our continuous discovery research project aims to provide invaluable insights to drive the enhancement of our product, ensuring it remains relevant and user-centric.'
- Project flow notifications:** A list of notification types with 'Send a test' buttons:
 - Project invitation (Sent to invited participants)
 - Approval email (Sent to applicants who are approved)
 - Session confirmation email (Participants receive this after they have scheduled a session)
 - Session reminder email (Sent 24 hours before the session begins)
 - Incentive ready email (Participants marked complete receive this afterward)
 - Incentive redeemed email (Participants receive this after redeeming their incentive)
- Other notifications:** Includes 'Messenger email and text notification' (Sent anytime a message is exchanged with a participant) with a 'Send a test' button.

Top 5 New Features

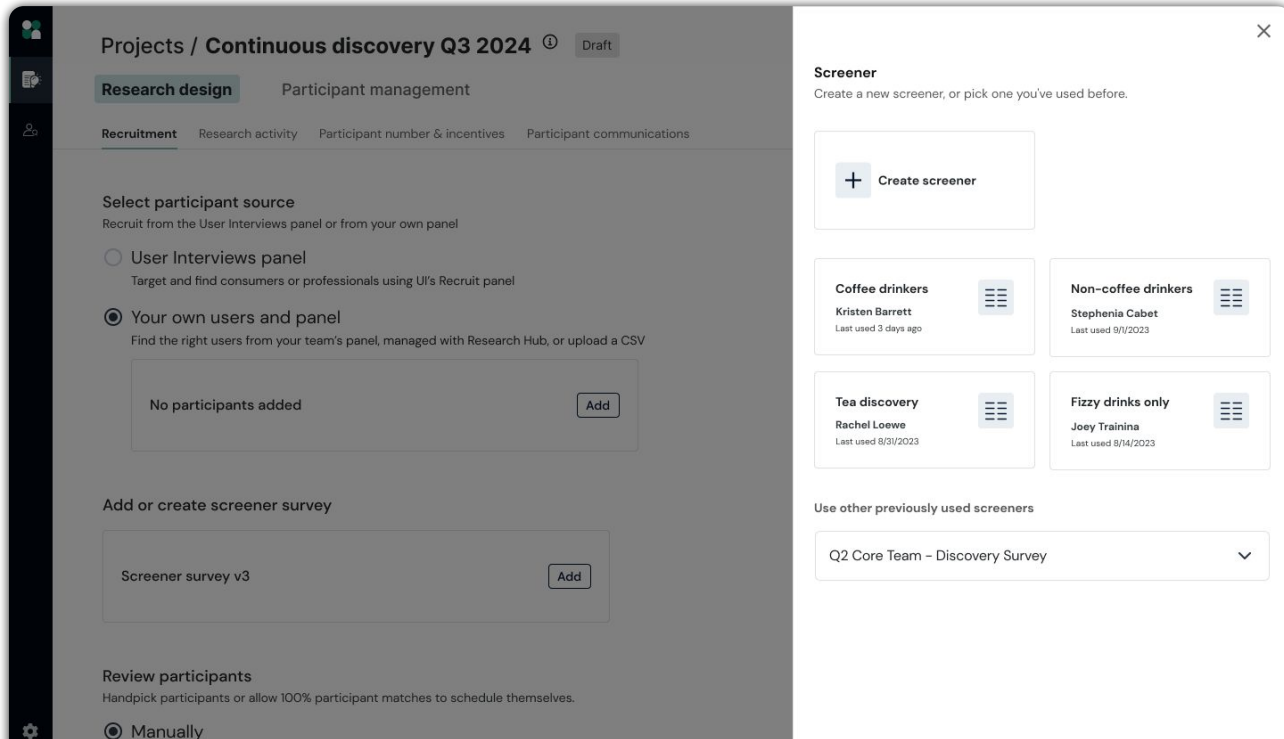
Top 6 Coming Soon

Unified Workspace

2024 Sneak Peek

| Unified Project Workspace

A foundation to build on. We designed this as a new foundation for fast, predictable, collaborative, and flexible research. Look for more updates in these areas in 2024!



Top 5 New Features

Top 6 Coming Soon

Unified Workspace

2024 Sneak Peek



Poll: Are you interested in joining our beta group?

We are currently looking for subscription teams who want early access to the new unified workspace.

 user interviews

2024 Sneak Peek

Theme 1: Research is Fast and Collaborative

Fast and Lightweight



Find the best participants faster with a redesigned participant review page



Reduce manual work with automated invitations (Hub) and reminders



Rinse and repeat with reusable recruitment criteria, screener questions, and a document library.

Collaborative



Recruit as a team with collaboration during research setup and participant review



Conduct research together with easier team scheduling and session prep

Top 5 New Features

Top 6 Coming Soon

Unified Workspace

2024 Sneak Peek

Theme 2: The Best Panel, Yours or Ours

Hub



Organize your panel with segment permissions and multiple panels



Keep your panel up to date with fresh participant data



Find your best participants with smarter Hub search

Recruit



Target the right participants with more data and smarter matching



Improve participant quality with general and B2B verifications



Acquire and retain participants with participant experience improvements

Top 5 New Features

Top 6 Coming Soon

Unified Workspace

2024 Sneak Peek

Audience Q&A

Thank You

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

See you in 2024 for Product Talk #13!