

What's Next at User Interviews

Spring 2025



Who you will hear from today



Zoe Nagara

Senior Director,
Product Marketing



Paolo Appley

Group Product
Manager



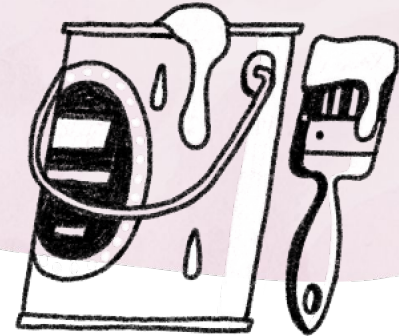
Claire Mai

Senior Product
Manager



Agenda

- Top 4 Recent Releases
- Top 4 Coming Soon
- Teams & Panels Walkthrough





WHAT'S NEW

Top 4 Recent Releases



TOP RECENT #1

Backend Panel Quality Systems

LAUNCHED

Improved participant quality with behind-the-scenes signals on suspicious behavior.

- Improved fraud detection system and ML models
- Ability to restrict application activity based on project fraud risk



98% of sessions receive positive feedback today



TOP RECENT #2

Researcher-Facing Quality Signals

LAUNCHED

Offer insight to researchers on suspicious participant behavior.

- Researcher tools to assess and control candidate quality
- Flagged responses with potential AI use
- Metadata on participant activity & behavior

John Doe
Qualified • 100% match
Account created January 10, 2024

+ Add tags

12 APPLICATIONS (PAST 30 DAYS)	1 COMPLETED SESSION (PAST 30 DAYS)	100% POSITIVE RATINGS (ALL TIME)
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Overview **Screener** Characteristics Task

⚠️ One of more of this participant's open text responses were copied and pasted, which can be a signal of AI use.

Tools to assess candidate quality



98% of sessions receive positive feedback today



Screener Best Practices Guide

LAUNCHED

Screener quality has a direct impact on participant quality and we have a lot of data points about what good screeners look like

- Avoid "over-screening"
- Setting up screeners that are more resilient to fraud
- Ensure improved completion rates



Last year we did analysis of **over 42,000 screeners** to understand what levers might impact drop-off rates

☰ Screener best practice guide Tips to screen for the right participants and pro

If you're looking for a more in-depth walkthrough of best practices, check out our [UX Research](#)



Keep it clear and concise

- Before building your screener, identify the must-have characteristics of people who answer your research questions and use the previous *Recruitment criteria* step to cover any
- To prevent drop-off, try to keep your screener to 10 questions or fewer and limit it to questions you haven't already covered with *Recruitment criteria*.
- Keep questions "to the point" and avoid overly technical language and jargon (unless it's a requirement for participation).
- Open response questions are useful for gauging communication skills—but try not to ask more than one or two.



Make sure your logic checks out

- Organize your questions and utilize skip logic so irrelevant applicants are filtered out.
Example: Before diving into questions about how people use food delivery apps, first ask if they use an app in the first place – and skip them to the end if not.
- Include all potential answer options to a question, and provide "catch-all" options, such as "the above," or "I'm not sure."



Protect against fraud

- While it's helpful to give a general idea of the study topic, avoid giving away the specific details to your audience of your research.
- If you're looking for users of your company or product, don't reveal what it is to applicants.
- Don't ask leading or loaded questions that may reveal how to answer the "right" way.
Example: Instead of asking, "Are you concerned about internet privacy?," try, "What are you most concerned about regarding internet use?"

Unmoderated Integrations

LAUNCHED

Integrate with best-in-class testing tools for seamless recruitment with any participants

- **Integrations released:** Maze, Optimal Workshop, Alchemer, Lyssna, UserTesting, UserZoom
- **Support for redirects:** Any testing tool that supports redirects will now work with User Interviews



Use a tool that you use that's not on our list? Let us know.

Available Testing Tool Integrations

 Qualtrics

 SurveyMonkey

 Typeform

 Lookback

 Loop11

 Sprig

 Alchemer

 User Testing

 Optimal Workshop

 Maze

 Lyssna

 UserZoom



WHAT'S NEXT

Top 4 Coming Soon



COMING SOON #1

Scheduling: Availability Blocks

Q2 2025

Create a **block of availability** to maximize scheduling options for participants while staying hands off

- More control than automatic scheduling
- Less oversight required than today's manual scheduling
- More scheduling options for participants

Americas/Eastern Time (UTC-5) ▼

Thur, Jan 16	Fri, Jan 17
	10:00 – 11:00 Session block
11:00 - 12:00 [UI] Maria Super	11:00 - 12:00 Session block
	1:00 - 2:00 Happy Hour
11:30 - 12:00 Jane 1-1	2:00 – 6:00 Availability block 15min buffer time
12:30 - 1:30 Office hours	

Limits
Set restrictions for booking frequency and advance notice.

Minimum notice
Minimum amount of time required before a participant can book a session.

9 hours ▼

Maximum sessions
Limit the number of sessions per day and/or week.

3 per day ▼

+ Add another limit

Buffer time
Time before, after and in between sessions (only applies to availability blocks).

15 minutes ▼

Start time increment
Time intervals at which start times are available for booking (only applies to availability blocks).

30 minutes ▼



COMING SOON #2

In-App Reporting

Q2 2025

Admins have global visibility into all activity across the organization.

- More powerful, cross-cutting reporting
- Track monthly and quarterly balances and usage across all Teams in your organization
- See billing info in aggregate or summarized at the invoice level



One of the **top requests** we hear from Admins

City of Pawnee

Members Reports Plans Billing Branding Templates Advanced options Edit Notes

Sessions & spending Team Activity Custom Report

Download Hide Filters

date_filter 9/01/2018 - 4/30/2025

organization_id Search...

(Select All)

3 of 3 items selected.

team_id Search...

(Select All)

12 of 12 items selected.

team_name Search...

(Select All)

9 of 9 items selected.

Hub Completed Sessions

ALL: PROJECT STATUSES; DATES FILTER APPLIES TO SESSION DATE

4,763

Hub Completed Sessions - Moderated vs. Unmoderated

Category	Count
Moderated Task	4,494
Unmoderated Task	269

The remaining tables in this section include usage statistics for **closed projects only**. The date filter can be used to filter by **project close date**.

Monthly/Quarterly Usage (All Teams)

Completed Projects Only (Status 5, 6); Dates Filter Applies to Project Close

	Project Close Date							
	Jul 2019	Aug 2019	Sep 2019	Oct 2019	Dec 2019	Jan 2020	Feb 2020	Mar 2020
Total Incentives + Fees	\$123.60	\$1,545.00	\$0.00	\$618.00	\$721.00	\$1,030.00	\$4,512.43	\$1,648.
Recruit Incentives + Fees	\$123.60	\$1,545.00	\$0.00	\$618.00	\$721.00	\$1,030.00	\$4,512.43	\$1,648.
Hub Incentives + Fees	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.
Recruit Projects Completed	1	1	1	1	2	1	6	
Recruit Participants Requested...	8	8	3	6	9	12	47	
Recruit Confirmed Sessions	1	11	0	4	10	12	40	
Recruit Fill Rate	12.50%	125.00%	0.00%	66.67%	88.89%	91.67%	82.98%	67.8
Recruit Completed Sessions	1	10	0	4	7	10	36	
Hub Projects Completed	1	0	0	0	0	1	1	
Hub Participants Requested	3	0	0	0	0	3	10	




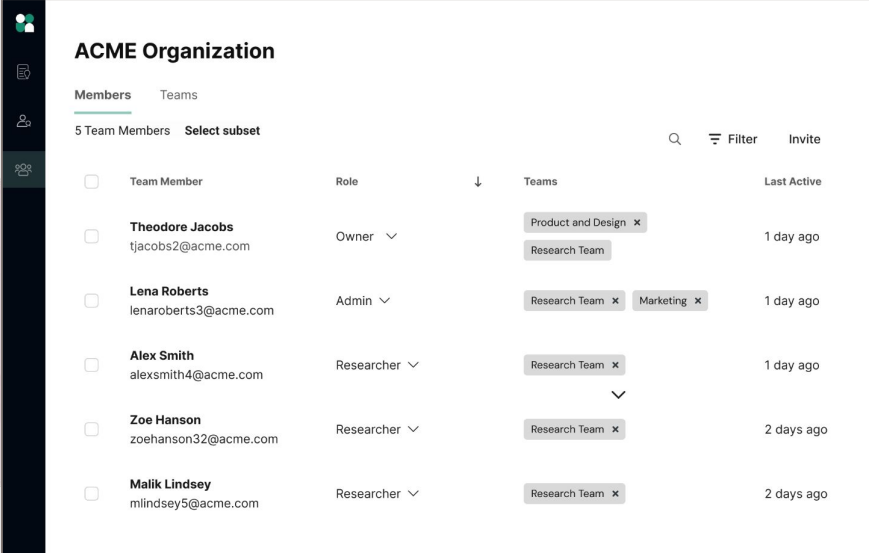
COMING SOON

Teams & Panels

Q2 2025

Teams & panels **make it easy to govern research** and enable operations at scale.

1. Create **Teams** to control access to panels, share assets, and customize settings.
2.  **HUB** Organize participants into **Panels** based on product line, region, opt-in status, or any other category.



The screenshot displays the 'ACME Organization' interface. It features a sidebar with navigation icons and a main content area. The main area is titled 'ACME Organization' and has tabs for 'Members' and 'Teams'. Below the tabs, it shows '5 Team Members' and a 'Select subset' option. A search bar, 'Filter' icon, and 'Invite' button are present. The main content is a table with columns for 'Team Member', 'Role', 'Teams', and 'Last Active'. The table lists five team members with their roles and assigned teams.

Team Member	Role	Teams	Last Active
<input type="checkbox"/> Theodore Jacobs tjacobs2@acme.com	Owner ▾	Product and Design x Research Team	1 day ago
<input type="checkbox"/> Lena Roberts lenaroberts3@acme.com	Admin ▾	Research Team x Marketing x	1 day ago
<input type="checkbox"/> Alex Smith alexsmith4@acme.com	Researcher ▾	Research Team x ▾	1 day ago
<input type="checkbox"/> Zoe Hanson zoe Hanson32@acme.com	Researcher ▾	Research Team x	2 days ago
<input type="checkbox"/> Malik Lindsey mlindsey5@acme.com	Researcher ▾	Research Team x	2 days ago

Illustrative teams concept



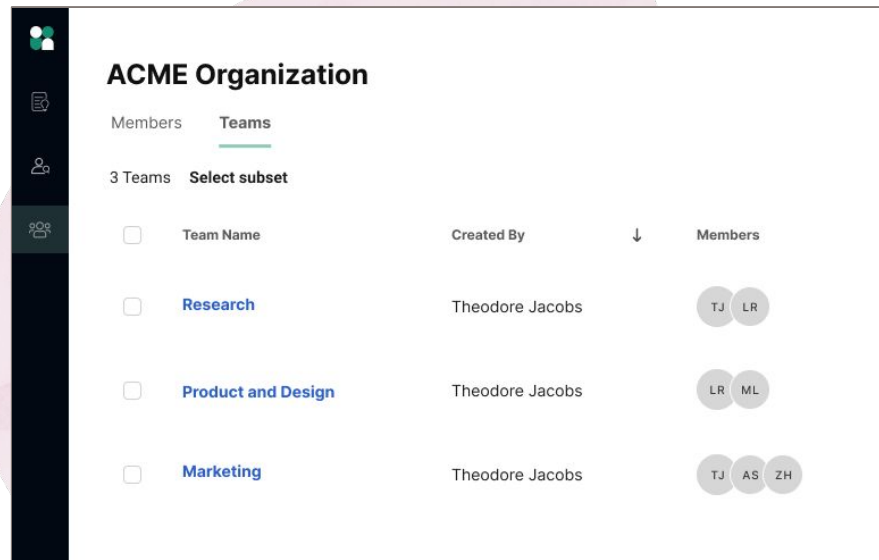
COMING SOON #3

Team Management

Q2 2025

The **most flexible setup** that can be configured for any organization's needs.

- Members can belong to **>1 Team**
- Templates, branding, & other customizations can be made **globally** or **team-by-team**



Illustrative teams concept



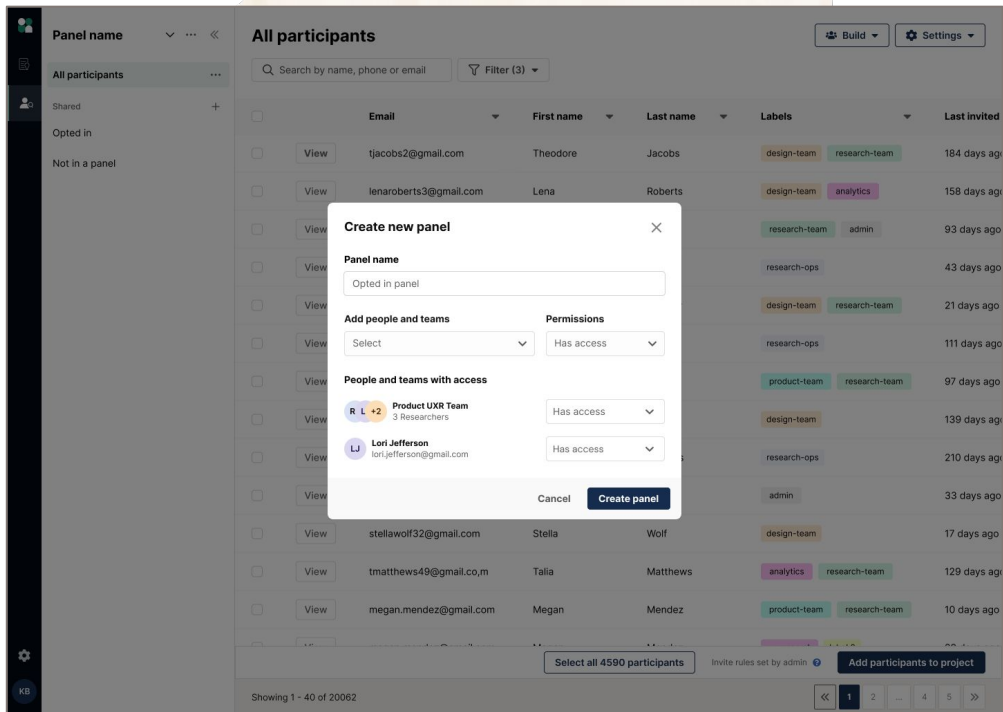
Panels

HUB

Q2 2025

Organize & manage access to participants, so that each team member has only the participants they need.

- Create an opt-in only panel
- Define panels by product or persona
- Permissions and access defined by individual researcher or Team





Poll: How might you use Teams or Panels to organize research at your company?

Work in progress design



WHAT'S NEXT

Teams & Panels Walkthrough



TEAMS & PANELS WALKTHROUGH

ACME Organization

Members **Teams**

3 Teams **Select subset**

<input type="checkbox"/>	Team Name	Created By	↓	Members	Last Edited
<input type="checkbox"/>	Research	Theodore Jacobs		TJ LR	1 mo ago
<input type="checkbox"/>	Product and Design	Theodore Jacobs		LR ML	3 mo ago
<input type="checkbox"/>	Marketing	Theodore Jacobs		TJ AS ZH	4 mo ago



TEAMS & PANELS WALKTHROUGH

ACME Organization

Members Teams

5 Team Members **Select subset** 🔍 ☰ Filter 👤 Invite

<input type="checkbox"/>	Team Member	Role	↓	Teams	Last Active
<input type="checkbox"/>	Theodore Jacobs tjacobs2@acme.com	Owner ▾		Product and Design ✕ Research Team	1 day ago
<input type="checkbox"/>	Lena Roberts lenaroberts3@acme.com	Admin ▾		Research Team ✕ Marketing ✕	1 day ago
<input type="checkbox"/>	Alex Smith alexsmith4@acme.com	Researcher ▾		Research Team ✕ ▾	1 day ago
<input type="checkbox"/>	Zoe Hanson zoe Hanson32@acme.com	Researcher ▾		Research Team ✕	2 days ago
<input type="checkbox"/>	Malik Lindsey mlindsey5@acme.com	Researcher ▾		Research Team ✕	2 days ago



TEAMS & PANELS WALKTHROUGH

The screenshot shows a 'Projects' dashboard with a sidebar on the left containing navigation icons. The main content area is titled 'Projects' and includes a 'Templates (4)' link. Below the title, there are filters for project status: 'All (1634)', 'Draft (831)', 'Active (174)', 'Pending close (40)', and 'Completed (589)'. A 'Filters (1)' dropdown and a search icon are also present. Two project cards are visible: 'Insights for UI (Hub)' and '[RX] Controlled invitations u...'. The 'Insights for UI (Hub)' card shows '1-on-1 Interview with own participant', a 'Pending close request' on '16 Jan 2025', and a table with 'Requested' (3) and 'Qualit' (0). The '[RX] Controlled invitations u...' card shows 'Unmoderated Task with own particip...', a 'Pending close request' on '02 Aug 2024', and a table with 'Requested' (3) and 'Qualit' (0). A 'Filter on projects' modal is open, showing 'Access type' with checked options for 'My projects', 'Shared with me', and 'Team projects'. The 'Team' section has a dropdown menu with 'Research Team' selected, and a list of other teams: 'Research Team', 'Design Team', and 'Marketing Team'. At the bottom of the modal are 'Clear filters' and 'Apply' buttons.

Projects

Templates (4)

All (1634) Draft (831) Active (174) **Pending close (40)** Completed (589) Filters (1) 🔍

Insights for UI (Hub)

1-on-1 Interview with own participant

Pending close request 16 Jan 2025

Requested	Qualit
3	0

[RX] Controlled invitations u...

Unmoderated Task with own particip...

Pending close request 02 Aug 2024

Requested	Qualit
3	0

Filter on projects

Access type

My projects Shared with me Team projects

Team

Research Team

Research Team

Design Team

Marketing Team

Clear filters **Apply**



TEAMS & PANELS WALKTHROUGH

The screenshot displays the 'Assets / Email communication' section of a software interface. A vertical sidebar on the left contains navigation icons for home, search, and user profile. The main content area has a breadcrumb trail: 'Branding' > 'Documents' > 'Email communication' > 'App page customization' > 'Security'. The 'Email communication' tab is active. Below the breadcrumb is a section titled 'Email Templates' with a '+ Create new' button. A sub-header reads 'Manage a set of templates that can be applied to a project's automated emails.' Two 'Study format' dropdown menus are present, both set to 'Select [selection category]'. Below these is a table of templates with columns for Template name, Default, Shared with, Study type, and Format. The table lists three templates: 'Standard Template', 'High value custom', and 'Awkward Silences', each with associated team tags and a study format.

Template name	Default	Shared with	Study type	Format
Standard Template	Product Team	Product Team Marketing Team	1-on-1 study	Online
High value custom			Unmoderated task	In-person
Awkward Silences	Marketing Team	Marketing Team Operations Team	Multi-day study	Phone



TEAMS & PANELS WALKTHROUGH

Entire population <<

RESEARCH HUB POPULATION

Entire population

+ Create panel

RECRUIT POPULATION

TechSupport Recruit panel

All participants

Build Settings

Search by name, phone or email Filter

	Email	First name	Last name	Labels	Last invited
<input type="checkbox"/>	View tjacobs2@gmail.com	Theodore	Jacobs	design-team research-team	184 days ago
<input type="checkbox"/>	View lenaroberts3@gmail.com	Lena	Roberts	design-team analytics	158 days ago
<input type="checkbox"/>	View alexsmith4@gmail.com	Alex	Smith	research-team admin	93 days ago
<input type="checkbox"/>	View zoehanson32@gmail.com	Zoe	Hanson	research-ops	43 days ago
<input type="checkbox"/>	View mlindsey5@gmail.com	Malik	Lindsey	design-team research-team	21 days ago
<input type="checkbox"/>	View evecooper7@gmail.com	Eve	Cooper	research-ops	111 days ago
<input type="checkbox"/>	View rowanbell7@yahoo.com	Rowan	Bell	product-team research-team	97 days ago
<input type="checkbox"/>	View ldillon45@gmail.com	Lawrence	Dillon	design-team	139 days ago
<input type="checkbox"/>	View ellarobbins4@yahoo.com	Ella	Robbins	research-ops	210 days ago
<input type="checkbox"/>	View michellebest05@gmail.com	Michelle	Best	admin	33 days ago
<input type="checkbox"/>	View stellawolf32@gmail.com	Stella	Wolf	design-team	17 days ago
<input type="checkbox"/>	View tmatthews49@gmail.co,m	Talia	Matthews	analytics research-team	129 days ago
<input type="checkbox"/>	View megan.mendez@gmail.com	Megan	Mendez	product-team research-team	10 days ago

Select all 4590 participants Invite rules set by admin Add participants to project



TEAMS & PANELS WALKTHROUGH

The screenshot shows a user interface for managing participants and panels. The main view is titled "All participants" and displays a list of participants with columns for Email, First name, Last name, Labels, and Last invited. A "Create new panel" dialog is open in the foreground, allowing the user to create a new panel with a name, add people and teams, and set permissions.

Entire population ▾ ... <<

All participants

Search by name, phone or email Filter (3) ▾

Build ▾ Settings ▾

	Email	First name	Last name	Labels	Last invited
<input type="checkbox"/>	View tjacobs2@gmail.com	Theodore	Jacobs	design-team research-team	184 days ago
<input type="checkbox"/>	View			design-team analytics	158 days ago
<input type="checkbox"/>	View			research-team admin	93 days ago
<input type="checkbox"/>	View			research-ops	43 days ago
<input type="checkbox"/>	View			design-team research-team	21 days ago
<input type="checkbox"/>	View			research-ops	111 days ago
<input type="checkbox"/>	View			product-team research-team	97 days ago
<input type="checkbox"/>	View			design-team	139 days ago
<input type="checkbox"/>	View			research-ops	210 days ago
<input type="checkbox"/>	View			admin	33 days ago
<input type="checkbox"/>	View			design-team	17 days ago
<input type="checkbox"/>	View tmatthews49@gmail.co.m	Talia	Matthews	analytics research-team	129 days ago
<input type="checkbox"/>	View megan.mendez@gmail.com	Megan	Mendez	product-team research-team	10 days ago

Create new panel

Panel name

Add people and teams

Select ▾

Permissions

Has access ▾

People and teams with access

- R L +2 Research Team**
4 Researchers
- B G +1 Marketing Team**
3 Researchers
- B G +4 Product + Design Team**
6 Researchers

Has access ▾

Has access ▾

Has access ▾

Cancel **Create panel**

Select all 4590 participants




TEAMS & PANELS WALKTHROUGH

Opted in panel ▾ <<

All participants Build ▾ Settings ▾

Search by name, phone or email Filter ▾

Email ▾ **First name** ▾ **Last name** ▾ **Last invited** ▾ **Date applied** ▾ **Mobile app**



No participants yet

Start adding participants to this panel through a CSV, data integrations, project integrations and more. Click the button below to get started.

[Add participants](#)

Select all 0 participants Invite rules set by admin ? [Add participants to project](#)



TEAMS & PANELS WALKTHROUGH


Opted in panel ▾ <<

- Research Hub population +
- Entire population
- Opted in panel
- Recruit population
- [Team name] Recruit panel

All participants

Build ▾ Settings ▾

Search by name, phone or email Filter ▾

	Email ▾	First name ▾	Last name ▾	Last invited ▾	Date applied ▾	Mobile app
 <p>No participants yet</p> <p>Start adding participants to this panel through a CSV, data integrations, project integrations and more. Click the button below to get started.</p> <p>Add participants</p>						

Select all 0 participants Invite rules set by admin ⓘ [Add participants to project](#)



TEAMS & PANELS WALKTHROUGH

The screenshot displays a user interface for managing participants. On the left, a sidebar shows navigation options: "Entire population", "All participants" (selected), "Shared", "Opted in", and "Not in a panel". The main area is titled "All participants" and features a search bar and a "Filter (3)" dropdown. Below this is a table of participants with columns for selection, email, first name, last name, labels, and a date column. A context menu is open over the table, listing actions such as "Export participants", "Edit Hub invite rules", "Edit fields", "Edit labels", and "Update permissions". At the bottom, there are buttons for "Select all 4590 participants" and "Add participants to project".

	Email	First name	Last name	Labels	
<input type="checkbox"/>	View tjacobs2@gmail.com	Theodore	Jacobs	design-team research	
<input type="checkbox"/>	View lenaroberts3@gmail.com	Lena	Roberts	design-team analytics	158 days ago
<input type="checkbox"/>	View alexsmith4@gmail.com	Alex	Smith	research-team admin	93 days ago
<input type="checkbox"/>	View zoehanson32@gmail.com	Zoe	Hanson	research-ops	43 days ago
<input type="checkbox"/>	View mlindsey5@gmail.com	Malik	Lindsey	design-team research-team	21 days ago
<input type="checkbox"/>	View evecooper7@gmail.com	Eve	Cooper	research-ops	111 days ago
<input type="checkbox"/>	View rowanbell7@yahoo.com	Rowan	Bell	product-team research-team	97 days ago
<input type="checkbox"/>	View ldillon45@gmail.com	Lawrence	Dillon	design-team	139 days ago
<input type="checkbox"/>	View ellarobbins4@yahoo.com	Ella	Robbins	research-ops	210 days ago
<input type="checkbox"/>	View michellebest05@gmail.com	Michelle	Best	admin	33 days ago
<input type="checkbox"/>	View stellawolf32@gmail.com	Stella	Wolf	design-team	17 days ago
<input type="checkbox"/>	View tmatthews49@gmail.co,m	Talia	Matthews	analytics research-team	129 days ago
<input type="checkbox"/>	View megan.mendez@gmail.com	Megan	Mendez	product-team research-team	10 days ago



TEAMS & PANELS WALKTHROUGH

The screenshot displays a software interface for managing participants. The main area is titled "All participants" and contains a table with columns for "Email", "First name", "Last name", "Labels", and "Last invited". A search bar and a "Filter (3)" dropdown are located at the top of the table. A modal dialog box titled "Update population permissions" is open in the foreground, featuring a "Select" dropdown for "Add people and teams", a "Permissions" dropdown set to "Has access", and a list of teams with their respective access levels. The dialog also includes a "Cancel" button and a "Save" button.

Panel name [dropdown] [more] [back]

All participants [search] Search by name, phone or email [Filter (3)]

Build [dropdown] **Settings** [dropdown]

	Email	First name	Last name	Labels	Last invited
<input type="checkbox"/>	View tjacobs2@gmail.com	Theodore	Jacobs	design-team research-team	184 days ago
<input type="checkbox"/>	View			design-team analytics	158 days ago
<input type="checkbox"/>	View			research-team admin	93 days ago
<input type="checkbox"/>	View			research-ops	43 days ago
<input type="checkbox"/>	View			design-team research-team	21 days ago
<input type="checkbox"/>	View			research-ops	111 days ago
<input type="checkbox"/>	View			product-team research-team	97 days ago
<input type="checkbox"/>	View			design-team	139 days ago
<input type="checkbox"/>	View			research-ops	210 days ago
<input type="checkbox"/>	View			admin	33 days ago
<input type="checkbox"/>	View			design-team	17 days ago
<input type="checkbox"/>	View tmatthews49@gmail.co.m	Talia	Matthews	analytics research-team	129 days ago
<input type="checkbox"/>	View megan.mendez@gmail.com	Megan	Mendez	product-team research-team	10 days ago

Update population permissions

Add people and teams [Select] **Permissions** [Has access]

People and teams with access

- Admins** always have edit access to the population view.
- Research Team** (4 Researchers) [Has access]
- Marketing Team** (3 Researchers) [Has access] [Remove]
- Product + Design Team** (6 Researchers) [Has access]

[Cancel](#) [Save](#)

Select all 4590 participants [dropdown] Invite rules set by admin [info] [Add participants to project](#)



TEAMS & PANELS WALKTHROUGH

The screenshot displays a user interface for managing participants. On the left, a sidebar shows navigation options: "Entire population", "All participants" (highlighted with a red box), "Shared", "Opted in", and "Not in a panel". The main area is titled "All participants" and includes a search bar, a filter dropdown (set to 3), and "Build" and "Settings" buttons. Below this is a table of participants with columns for selection, email, first name, last name, labels, and last invited date. A modal window titled "Update population permissions" is open, featuring dropdowns for "Add people and teams" (set to "Select") and "Permissions" (set to "Has access"). Below these is a section "People and teams with access" containing an information icon and the text "Admins always have edit access to the population view." The modal has "Cancel" and "Save" buttons. At the bottom of the interface, there are buttons for "Select all 4590 participants", "Invite rules set by admin", and "Add participants to project".

	Email	First name	Last name	Labels	Last invited
<input type="checkbox"/>	View tjacobs2@gmail.com	Theodore	Jacobs	design-team research-team	184 days ago
<input type="checkbox"/>	View lenaroberts3@gmail.com	Lena	Roberts	design-team analytics	158 days ago
<input type="checkbox"/>	View alexsmith4@gmail.com	Alex	Smith	research-team admin	93 days ago
<input type="checkbox"/>	View			research-ops	43 days ago
<input type="checkbox"/>	View			design-team research-team	21 days ago
<input type="checkbox"/>	View			research-ops	111 days ago
<input type="checkbox"/>	View			product-team research-team	97 days ago
<input type="checkbox"/>	View			design-team	139 days ago
<input type="checkbox"/>	View			research-ops	210 days ago
<input type="checkbox"/>	View michellebest05@gmail.com	Michelle	Best	admin	33 days ago
<input type="checkbox"/>	View stellawolf32@gmail.com	Stella	Wolf	design-team	17 days ago
<input type="checkbox"/>	View tmatthews49@gmail.co.m	Talia	Matthews	analytics research-team	129 days ago
<input type="checkbox"/>	View megan.mendez@gmail.com	Megan	Mendez	product-team research-team	10 days ago



TEAMS & PANELS WALKTHROUGH

Manage opt in forms

Opt in form name	Last modified	Status	Panels
Welcome to the panel	March 2, 2025	Active	Opted in panel ▼



Join our panel

Please fill out the information below to provide valuable feedback on our products and services.

Which types of fresh produce do you typically buy? (REQUIRED)

Apples

Tomatoes

Lettuce

Carrots

Other

Type your response here

What is your date of birth? (REQUIRED)

Do you have a ProduceMart Subscription? (REQUIRED)

Yes

No

How many trips to the grocery store do you typically take per month? (REQUIRED)



TEAMS & PANELS WALKTHROUGH

Projects / **Research study** Active RR MG 📄 ⋮

Research design **Participant management**

Shortlisted (91) Invited (91) **Applied (22)** Potential (8) Approved (10) Scheduled (0) Completed (0) Removed from study (0)

<input type="checkbox"/>	Participant	Status	Tags	Do you want to participate in future researcher studies	What are your favorite breakfas...	What is your
<input checked="" type="checkbox"/>	Lena Roberts Actor	Approved	Great fit ×	Yes	Pancakes, Waffles	121
<input type="checkbox"/>	Micah Andrews Hi! I'm running late to our s...	Approved	Great fit ×	No	Eggs	96
<input checked="" type="checkbox"/>	Henry Diaz 3D animator	Qualified	Potential fit ×	Yes	Waffles	200
<input checked="" type="checkbox"/>	Leslie Smith Sound effects designer	Unqualified	Not a fit ×	Yes	French Toast	4093

3 participants selected Add to Research Hub panel Remove Schedule invitation Invite now ⋮

Showing 1-4 of 4 per page 1 2 3 ... >



TEAMS & PANELS WALKTHROUGH

Opted in panel ▾ ... <<

All participants ...

Search by name, phone or email Filter ▾

Build ▾ **Settings** ▾

<input type="checkbox"/>	Email	First name	Last name	Last invited	Labels
<input type="checkbox"/>	View lenaroberts3@gmail.com	Lena	Roberts	184 days ago	design-team research-team
<input type="checkbox"/>	View henry.diaz2@gmail.com	Henry	Diaz	158 days ago	design-team analytics
<input type="checkbox"/>	View leslie.smith4@gmail.com	Leslie	Smith	93 days ago	research-team admin

Select all 4590 participants



TEAMS & PANELS WALKTHROUGH

The screenshot displays a user interface for managing participants. On the left, a sidebar shows navigation options: 'Entire population' (selected), 'All participants', 'Shared', 'Opted in', and 'Not in a panel'. The main area is titled 'All participants' and includes a search bar, a 'Filter (3)' dropdown, and 'Build' and 'Settings' buttons. A table lists participants with columns for selection, email, first name, last name, labels, and last invited date. A 'Bulk actions' dropdown menu is open over the table, listing options: 'Add label', 'Add to panel', 'Compose email', and 'Delete'. The 'Add to panel' option is highlighted. At the bottom, a blue button reads 'Add participants to project'.

	Email	First name	Last name	Labels	Last invited
<input type="checkbox"/>	View tjacobs2@gmail.com	Theo	Jacobs	design-team research-team	184 days ago
<input type="checkbox"/>	View lenaroberts3@gmail.com	Len	Roberts	design-team analytics	158 days ago
<input type="checkbox"/>	View alexsmith4@gmail.com	Alex	Smith	research-team admin	93 days ago
<input checked="" type="checkbox"/>	View zoehanson32@gmail.com	Zoe	Hanson	research-ops	43 days ago
<input checked="" type="checkbox"/>	View mlindsey5@gmail.com	Malik	Lindsey	design-team research-team	21 days ago
<input checked="" type="checkbox"/>	View evecooper7@gmail.com	Eve	Cooper	research-ops	111 days ago
<input type="checkbox"/>	View rowanbell7@yahoo.com	Rowan	Bell	product-team research-team	97 days ago
<input type="checkbox"/>	View ldillon45@gmail.com	Lawrence	Dillon	design-team	139 days ago
<input type="checkbox"/>	View ellarobbins4@yahoo.com	Ella	Robbins	research-ops	210 days ago
<input type="checkbox"/>	View michellebest05@gmail.com	Michelle	Best	admin	33 days ago
<input type="checkbox"/>	View stellawolf32@gmail.com	Stella	Wolf	design-team	17 days ago
<input type="checkbox"/>	View tmatthews49@gmail.co,m	Talia	Matthews	analytics research-team	129 days ago
<input type="checkbox"/>	View megan.mendez@gmail.com	Megan	Mendez	product-team research-team	10 days ago




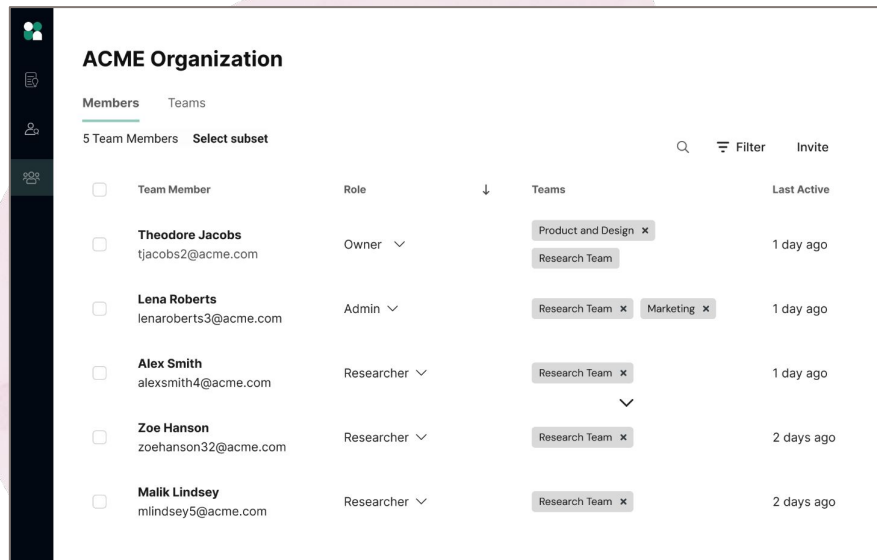
COMING SOON

Teams & Panels

Q2 2025

Teams **make it easy to govern research** and enable operations at scale.

1. Create **Teams** to control access to panels, share assets, and customize settings.
2.  **HUB** Organize participants into **Panels** based on product line, region, opt-in status, or any other category.



The screenshot displays the 'ACME Organization' interface. It features a sidebar with navigation icons and a main content area. The main area is titled 'ACME Organization' and has tabs for 'Members' and 'Teams'. Below the tabs, it shows '5 Team Members' and a 'Select subset' option. A search bar, 'Filter' icon, and 'Invite' button are present. The table below lists team members with columns for checkboxes, names, roles, roles dropdowns, team assignments, and last active dates.

<input type="checkbox"/>	Team Member	Role	↓	Teams	Last Active
<input type="checkbox"/>	Theodore Jacobs tjacobs2@acme.com	Owner	▼	Product and Design x Research Team	1 day ago
<input type="checkbox"/>	Lena Roberts lenaroberts3@acme.com	Admin	▼	Research Team x Marketing x	1 day ago
<input type="checkbox"/>	Alex Smith alexsmith4@acme.com	Researcher	▼	Research Team x ▼	1 day ago
<input type="checkbox"/>	Zoe Hanson zoe Hanson32@acme.com	Researcher	▼	Research Team x	2 days ago
<input type="checkbox"/>	Malik Lindsey mlindsey5@acme.com	Researcher	▼	Research Team x	2 days ago

Illustrative teams concept

