

How We Recruit Participants for Customer Research Interviews in Our Design Thinking Workshops



“I Buy Motorcycle” is the first Design Thinking Workshop run by our team.

Today’s topic: How does the I Buy Motorcycle team recruit participants for customer research interviews?

When we launched this team, our first goal was to better understand the mindsets of motorcyclists broadly to create a better customer experience. That’s where customer research comes in.

Customer research interviews help us understand customers’ pain points, frustrations, motivations, and positive experiences. I like to think of it as a “focus group of one.” Design Thinking is founded upon this type of open-ended customer research.

We worked with our stakeholders to create a customer research interview divided into four major sections:

- Participants' use of technology and shopping behavior
- Motorcycle use and behavior (the fun part!)
- Discussion of each participant's collage (a homework assignment)
- Journey map and discussion around researching and shopping for motorcycle insurance



A participant's collage

To conduct a research interview, though, we have to have participants – and there's more that goes into recruiting participants than one might think. Let's walk through the process. There are several approaches you can take when recruiting participants, each with pros and cons:

Recruiting Option	Pros	Cons
<p><i>In person, moderated sessions, local</i> (bringing participants into our User Experience Research Lab at our Boston office)</p>	<p>Stakeholders can observe participants' facial expressions and body language</p> <p>Participants need to take part in hands-on activities, which are easiest to do in person</p>	<p>Recruiting from only one metropolitan area</p>
<p><i>Remote, moderated sessions</i></p>	<p>Can recruit participants from all over the country</p>	<p>Set-up is tricky: participants need a headset or microphone, a webcam, and software</p>

Recruiting Option	Pros	Cons
		<p>May not be able to observe facial expressions and body language</p> <p>Hard to coordinate hands-on activities</p>
Remote, unmoderated sessions	Inexpensive to run	<p>Limited to 10-20 minutes in length</p> <p>Can't ask participants any follow-up or probing questions</p> <p>Doesn't allow for robust recruiting criteria; limited to only 5-7 demographic criteria</p>
In person, moderated sessions, local (renting a third-party space in Boston to interview customers)	Participants don't know who is running the sessions	High cost
In person, moderated sessions, national (traveling to different areas of the country and running sessions there)	Participants don't know who is running the sessions	<p>High cost</p> <p>Takes a long time to plan and carry out – not very agile</p>

Ultimately, we chose to bring in 15 participants over three days at our User Experience Research Lab in our downtown Boston office to give us enough rich data to draw conclusions, but we were forced to run remote, 60-minute moderated sessions on Day 3 because of a snowstorm. We also decided that we would run nationwide remote studies later in the process to test prototypes and make sure we get customer representation across regions. We asked potential participants 20-25 questions in a recruiting screener to measure several motivational criteria (whether they will want to use our product), behavioral criteria (whether they will be able to use our product), and demographic criteria (for example, age, education, income, etc.). Here are a few examples:

- **Demographic:** "What is the last level of education you completed?"
- **Behavioral:** "Do you own and ride one or more motorcycles?"
- **Motivational:** "Why did you *not* research insurance online?" (If they reported they called to find out about insurance)

Design thinking also promotes talking to “extreme users,” or those outliers on the fringes. By understanding what people on the far reaches need, we can arrive at solutions that can work for everyone. More importantly, talking to extreme users can spark our creativity by exposing us to use cases and design opportunities that we may never have imagined otherwise.

In our case, we recruited a Liberty Mutual sales rep who works with a local Harley-Davidson dealership and helps customers evaluate the right level of motorcycle insurance for their needs. His perspective on why customers purchase which levels of motorcycle insurance was helpful to our design team in creating the first prototypes.

Next, see “[How We Create Personas in Our Design Thinking Workshops.](#)”