
Remote Research With Optimal Workshop



Optimal Workshop platform overview



OptimalSort

+



Treejack

Information architecture



Chalkmark

First-click
testing



Questions

Surveys



Reframer

Qualitative
note-taking

Standard

—
Advanced

Participant
recruitment
services

*additional cost

First-click testing with Chalkmark

[Bananacom demo](#)

For Pet's Sake

Peter Pettings online emporium for pet purchases

Welcome

Welcome to this Chalkmark study, and thank you for agreeing to participate!

The activity shouldn't take longer than 10 to 15 minutes to complete.

Your response will help us to improve our outdated home page. Find out how on the next page...

type what ever you want!

Continue



Chalkmark

Chalkmark digitizes and simplifies paper prototyping

Chalkmark enables you to upload images and set tasks for users to complete, by **clicking where** they think they'd find the information. Analyse heat maps, **time taken** and success rates you will rapidly gather feedback on designs / prototypes / physical spaces.

More info

Help center

In-depth 101

Blog

Using Chalkmark for your project

Early prototype evaluation

- ✓ Test to see if key elements on the page are clear for users
- ✓ Test variations of icons stand alone or in prototypes

Alternate use cases

- ✓ Test physical spaces
- ✓ Iterate quickly when one page or element needs work after usability test
- ✓ Test .gifs for time to click
- ✓ Follow on step from a Tree test

Task score

- Learn what correct areas were most clicked
- Get time taken, success and directness statistics
- Refit correct areas if needed

Clickmaps

- View heatmaps to see densely clicked areas
- Select wider areas to group disparate clicks

Recruiting Participants

Recruiting with Optimal Workshop



What we offer

In-app and custom

In app recruitment

- Use the in-app calculator for general population demographic options and a quote price
- Quickly and easily get participants responding to your study
- Affordable way to get feedback

Advanced recruitment

- Discuss your project and ideal target group(s) with Support@optimalworkshop.com or quotes
- Spend a little more time making sure users are fit for your project

In-app recruiting

No. of participants

Age Range

Any

Choose

Country

Education level

Occupation status

Gender

Estimated cost

We could do this in **2-3 days** for **\$1,107 (NZD)**

That's **\$11.07 (NZD)** per completed response

How to get the best results

Good study design

- Keep your study under 10 minutes to complete
- Recruit in a suitable language for the country you are recruiting from
- Customize your study instructions to help participants contribute relevant information
- Utilize pre and post study questions to collect all of the additional demographic information you need

Target your ideal participants accurately

- Don't add screening questions that will reject over 66% of the general population
- If you're unsure about how well you can reach your target group with in-app demographic options reach out to Support@optimalworkshop.com
- 10-15% replacement rate is normal
- We will replace for free any low quality submissions

Recruiting with Optimal Workshop



Custom recruitment

Pre-profiling of participants

Narrow down general population to meet your project requirements

- 21 broad topics. I.e, Business and occupation, electronics and usage, hobbies and interests, finance, media
- Each of these have 10-20 sub questions, each with 2-30 answer types
- General rule: We can recruit current habits, ownership but not for future intent

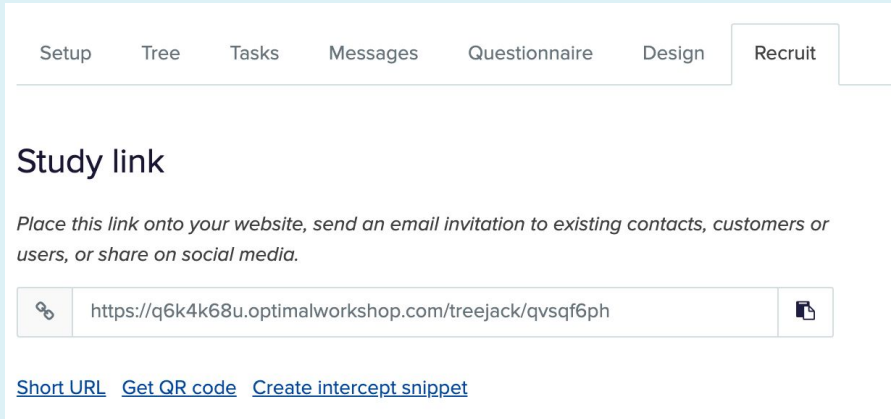
Recruiting with Optimal Workshop for quantitative users



The process

- Reach out to Support@optimalworkshop.com to tell us a little bit about:
 - Your project and research outcomes you want to get
 - Who your ideal participants are and what demographics that entails
 - What country(ies) you want to recruit from
 - Total sample size you want
- Review of panel recruitment options for feasibility and discuss
- Quote / invoice and payment (average price USD \$10-14)
- Finalize and launch your study + give us the green light to start field work
- Field work (2-3 days)
- Review and replacement field work

Recruiting your own participants



The screenshot shows the 'Recruit' tab in the Optimal Workshop interface. At the top, there is a navigation bar with tabs for 'Setup', 'Tree', 'Tasks', 'Messages', 'Questionnaire', 'Design', and 'Recruit'. Below the navigation bar, the 'Study link' section is visible. It contains the text: 'Place this link onto your website, send an email invitation to existing contacts, customers or users, or share on social media.' Below this text is a text input field containing the URL 'https://q6k4k68u.optimalworkshop.com/treejack/qvsqf6ph'. To the left of the input field is a link icon, and to the right is a copy icon. At the bottom of the 'Study link' section, there are three links: 'Short URL', 'Get QR code', and 'Create intercept snippet'.

How to source your own participants

- Third party recruitment companies
- Recruiting your own / clients customers
- QR code
- Social media share
- Intercept snippet

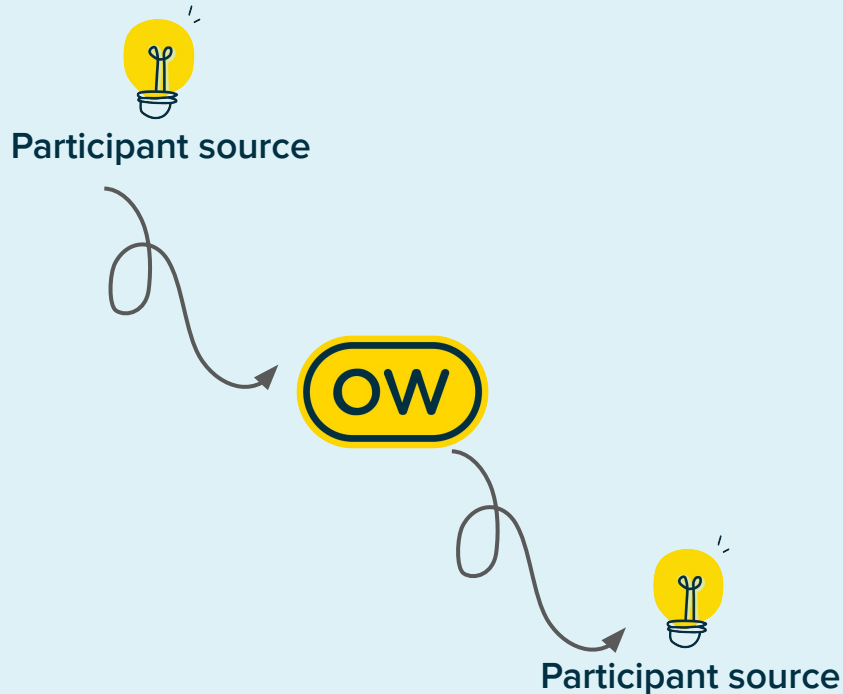
Remuneration

- Some options I have seen customers use
 - Vouchers
 - Credit for your products
 - Early access to features or products
 - Collecting identifying information for incentives

But how much?

- Some customers have advised their standard is USD \$40 for 30 minutes
- Consider the length of your study
- Consider the group you're engaging
- Check your internal guides and policies

Recruiting your own participants



Passing Identifiers and parameters

Identifier This is passed in by using 'i' and passed out using the same 'i=[ENTRY]'.

Token This is passed in by using any term, but needs to be sent out using 'XXX=[ID]' (XXX means that you can have any name for the parameter here)

Tag This is passed in using 'tag' and sent out using 'tag=[TAG]'.

URL sent to participant

`https://KiwiJoel.optimalworkshop.com/treejack/apia741ne?i=UNIQUETOKEN&PERSONA=Buyer&tag=18-29`

Connection URL

`https://KiwiJoel.optimalworkshop.com/optimalsort/514b04f2?i=[ENTRY]&Persona=[ID]&tag=[TAG]`

[Redirect URL Wizard \(click me!\)](#)



Ask us anything

Thank you!