
Remote Research With OptimalSort

Optimal Workshop platform overview



OptimalSort

+



Treejack

Information architecture



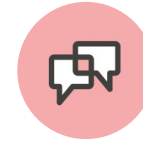
Chalkmark

First-click
testing



Questions

Surveys



Reframer

Qualitative
note-taking

Standard

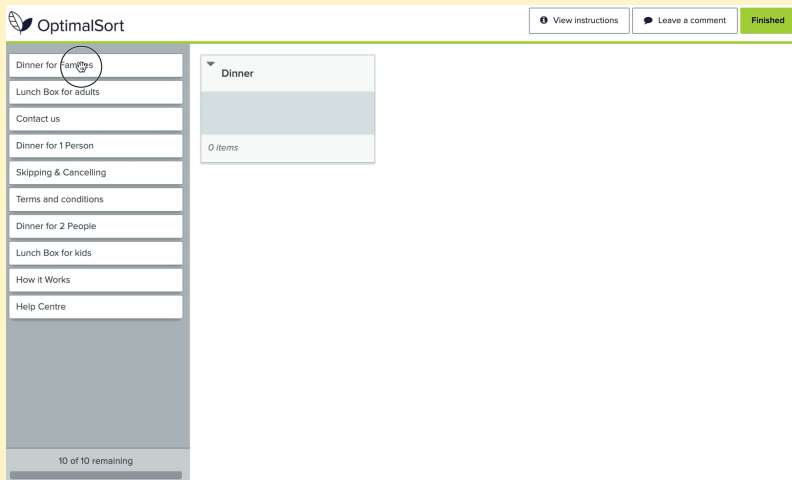
Advanced

Participant
recruitment
services

*additional cost

Card sorting with OptimalSort

Bananacom



OptimalSort

OptimalSort digitizes and simplifies card sorting

OptimalSort enables you to present a list of content (cards) to users who can then arrange them into categories that make sense to them.

More info

Help centre

Blog

101 in-depth guide

Using OptimalSort

Information architecture testing

- ✓ What groupings make most sense to your customers?
- ✓ Do your customers agree with your grouping ideas?
- ✓ Are there sub groups who think differently and who might they be?

Alternate use cases

- ✓ What tasks/features are most essential to your users
- ✓ Which icons/terms match with what sentiments?
- ✓ Is all of this content still valid?
- ✓ What preference order do cards rank?

Open card sorting results are

Exploratory

- Individual card statistics
- Category analysis
- View strengths of standardized categories

Statistical

- Similarity between cards
- Understand natural groupings
- Most common category suggestions
- Visualise groupings in 3D

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

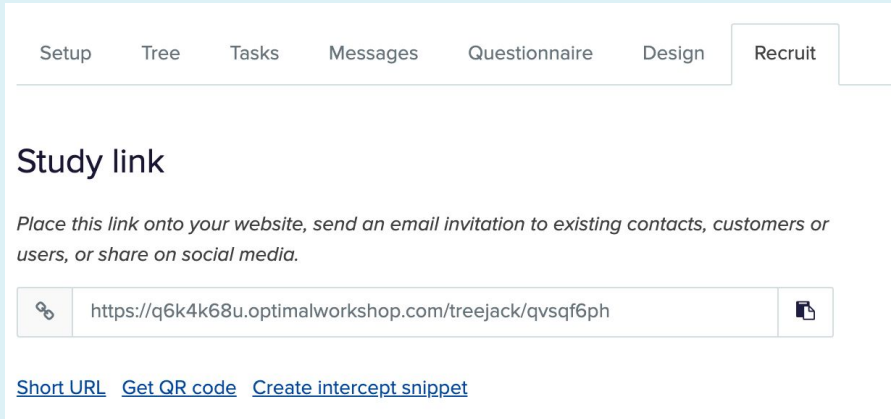
Recruiting with Optimal Workshop for quantitative users



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 instruction: 'Place this link onto your website, send an email invitation to existing contacts, customers or users, or share on social media.' Below this instruction 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

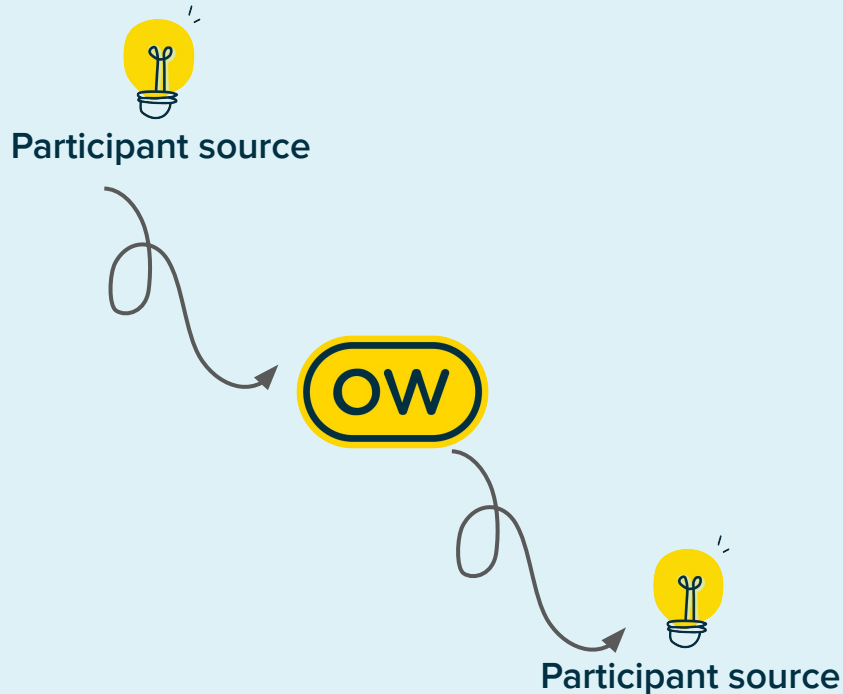
Remuneration

- 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!