

Screener template

Demographics

These are based on information provided during the kick-off meeting. They are based on who the test participant is to represent the most likely user groups of the final product.

Without any constraints, researchers try to get a good mix of ages, genders, localities, educational backgrounds, etc... However, a project may be focused just on millennials or baby boomers and constrain to that specific age range.

- X. What is your age range?
- | | |
|-------|----------------|
| 18-25 | DISMISS |
| 26-45 | |
| 46-60 | DISMISS |
| 61-70 | DISMISS |
| 71+ | DISMISS |

Skills/Behaviors needed

These are based on information provided during the kick-off meeting. They are necessary skills/behaviors to represent the most likely user groups of the final product.

For example, a mobile app study would need all test participants to be smartphone users. A mortgage study would require that all test participants were currently in the process of (or had in the recent past) obtaining a mortgage.

- X. Which types of apps do you access on your phone on a regular basis (more than monthly)? Select all that apply.
- | | |
|----------|---------------------------------|
| Shopping | |
| Banking | If not selected, dismiss |
| Reading | |
| News | |
| Games | |

Legal requirements

Find out if there are any compliance approvals needed for screener. Some companies are sensitive to any perceived discrimination and require legal approval of screeners. This can add up to two weeks to the timeline.

This sample template is a recreation from memory. Due to strict NDAs, I don't have any of the original work that I did.