



PLANNING YOUR RESEARCH WITH TERAPAGE

 TERAPAGE

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Planning your research with TeraPage

As a research expert, planning an online qualitative study requires some different considerations compared to a traditional qualitative study. This guide introduces the top 10 key factors to keep in mind when organizing an online qualitative research study. We'll explore the main questions to consider at each phase of your study.

This overview isn't meant to be an exhaustive step-by-step manual on research design. Rather, it's designed to help initiate your planning process, offering insights to effectively scope and prepare for your study across several important areas:

1. Participant Onboarding Process
2. Multilingual Capabilities
3. Incorporating Gamification and Point Systems
4. Custom Messaging and Persona Development
5. Activity Structuring and Order of precedence
6. Live Chat and Discussion Features
7. Crafting Activities, Questions and Tasks
8. Video Integration
9. Study Timeline and Time Management
10. Building Community and Engagement

While not all these elements will be essential for every study, reflecting on them can enhance the quality of your research community by refining its structure, participation, and depth of insights. Taking these factors into account will streamline your study execution and contribute to an overall more successful research experience.

Participant onboarding process



Participants are essential to every study, and members are the core of any community! For an online qualitative study, whether it's a short-term study or an ongoing one, recruiting the right people and engaging them online is crucial.

At this stage, it's important to consider the following:

- **Do you require early access for onboarding?** This could be to set up the community, transition members from an existing group, or ensure that everyone is in place and informed about what's coming before the study kicks off.
- **Will you be using a participant panel?** If so, will any participant data be transferred as part of this integration process?
- **Is recruitment support needed?** If you require assistance in finding suitable participants based on your study criteria, consider sourcing the right partner for recruitment.
- **Do you have existing participant data?** If you have information from a recruitment database or past Studies, will you want this information organized into custom profile fields or segments?
- **How will onboarding invitations be handled?** Will you send personalized email invites directly, or use a shared link that can be distributed or posted online for broader access?

Addressing these questions will help ensure a smooth participant onboarding experience, setting up your study for success right from the start.

Multilingual capabilities



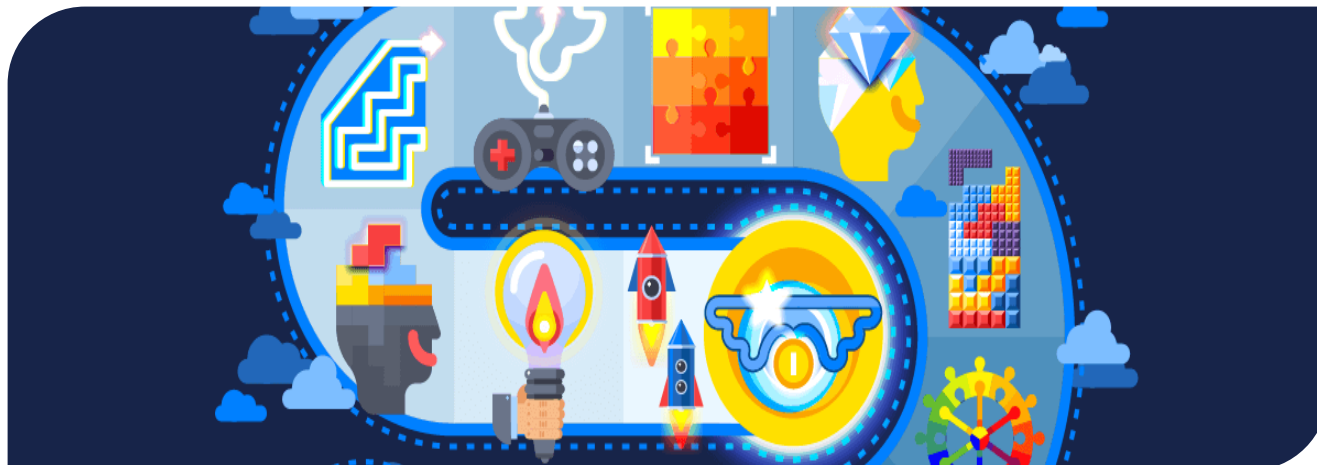
Moving your Studies online offers both convenience and greater reach, allowing you to manage simultaneous or sequential studies across various markets and languages—all from a single platform.

When working with Studies that involve multiple languages, keep the following considerations in mind:

- Should the study operate within one multilingual community space, or should it be separated by language?
- A unified community space is effective when your main goal is simply to provide language options. For instance, a US-based study might include both English and Spanish, while a Canadian study could offer English and French.
- Separate spaces for each language are more advantageous when multiple markets are involved, as these often require unique handling, such as dedicated moderators for each region.
- Will the study require tailored questions and activities to respect cultural differences and provide meaningful cross-cultural insights?

Taking these factors into account will help you decide on the most effective structure for a successful multilingual study.

Incorporating gamification and points



One exciting feature of online qualitative research is the option to incorporate gamification into your study environment. By using points, achievement levels, and leaderboards, you can enhance participant engagement and provide effective incentives.

If you are considering a points system for your community, here are some questions to guide your approach:

- Will points be assigned to specific Activities and Discussions to encourage participation, such as bonus feedback tasks or study diaries?
- Should certain types of responses earn more points? For example, would richer content like video or photo uploads be valued over plain text responses?
- Can points be used to foster social interactions, prompting members to post, comment, or rate each other's contributions?
- Would a leaderboard motivate participants by showing community standings, increasing engagement overall?
- For long-term communities, should points be used to determine incentive rewards based on participation levels, with periodic resets?

These considerations can help you design a gamified environment that drives engagement and participation in your research community.

Custom messaging and persona development



To maximize the impact of your study and foster genuine conversation with participants, aim to personalize your communication to resonate with the various personas in your community.

To keep members both informed and actively engaged, consider the following elements:

- Is your invitation wording clear and informative, explaining the purpose and duration of the community, participant roles, incentives, and any rewards? Including this information prominently on the community’s Home page helps set expectations.
- How can your guidance language be crafted to emotionally engage members? Using a conversational tone can strengthen connection and participation.
- Are you designing targeted question pathways that show relevant questions only to specific participant groups, leading to more accurate and valuable responses?

By taking these aspects into account, you will create a more tailored and engaging experience that encourages richer insights from your participants.

Activity structuring and order of precedence



Designing a study for online studies differs from in-person approaches. Online research offers unique design possibilities, such as creating specific pathways for different participant groups and strategically ordering activities.

Here are some essential considerations for activity planning and sequencing:

Will all participants receive the same questions, or should certain activities be tailored for specific groups?

- Are there any activities that should function as a journal with recurring access, such as prompts asking participants to respond each time they use a particular product?
- Have participants received clear guidance on what to document in their recurring journal entries, along with detailed instructions for consistent responses?
- Will activities be released in stages to maintain a structured timeline for everyone, or should they be available all at once, allowing participants the flexibility to complete tasks at their own pace within a session?
- Should there be a fixed sequence for completing activities, or will a more open approach be used, with dates controlling when tasks are accessible?
- When sequencing is applied, will all activities follow a strict order, or are there some that should remain available at any time, such as an ongoing journal entry activity?

By carefully considering these aspects, you can create a well-organized, engaging online research experience tailored to participants' needs and your study's goals.

Live chat and discussion features



Incorporating real-time interactions or discussion boards into your study adds flexibility for personal expression and allows you to gather insights through natural, organic communication.

If you are planning to use these approaches in your research design, consider the following:

- How could a real-time component enhance your study by allowing participants to connect and engage simultaneously?
- What questions and content should be prepared in advance for live sessions, such as introductory and closing remarks, prompts to initiate discussion, visuals for review, or polls to gather quantitative insights?
- Would an open-ended space be beneficial, where participants can contribute freely without structured response prompts (e.g., for collaborative brainstorming or ideation)?
- What topics will guide these discussions, and will you be setting these topics, or will participants have the freedom to initiate their own?

Reflecting on these points can help you design an interactive, engaging research experience that leverages real-time and organic discussions to gain deeper insights.

Crafting activities, questions and tasks



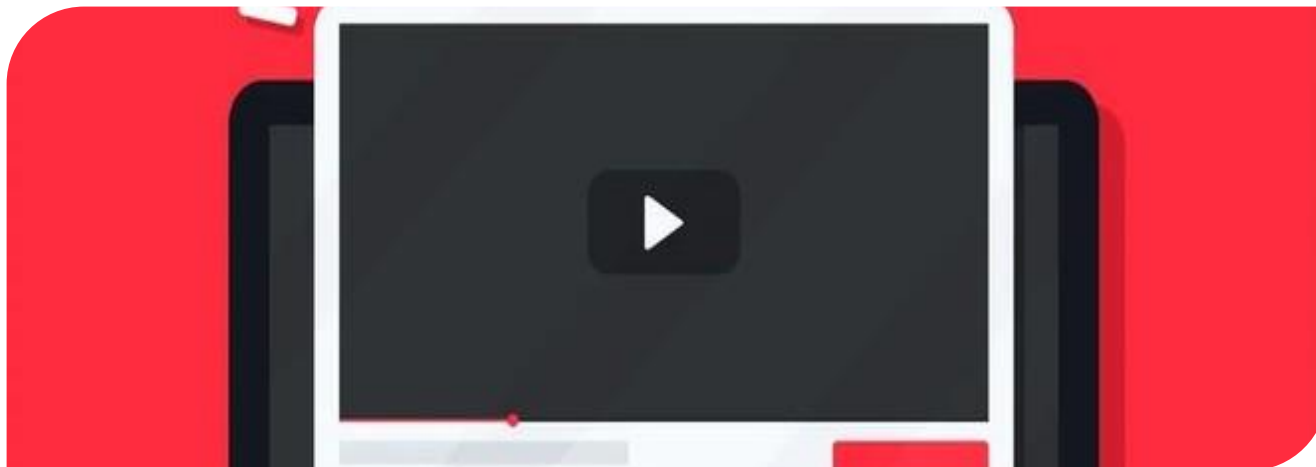
In addition to ensuring your guide addresses all research objectives, crafting an online moderation guide should take full advantage of the digital format and its unique features.

For designing effective questions and exercises in an online community, consider the following:

- How can you create a mobile-friendly design with shorter, more concise tasks suited to smaller screens?
- How can you add structure to open-ended qualitative items by incorporating closed-ended, quantitative questions for balance?
- How might task randomization and grouping be used to support concept testing strategies?
- How can group-based activities be organized and shared to encourage collaborative engagement?
- How can you include interactive and media-rich questions to minimize lengthy text responses, such as using projective techniques or annotation exercises?

Keeping these points in mind will help you develop a guide that is optimized for digital participation, enhancing the online research experience.

Video integration



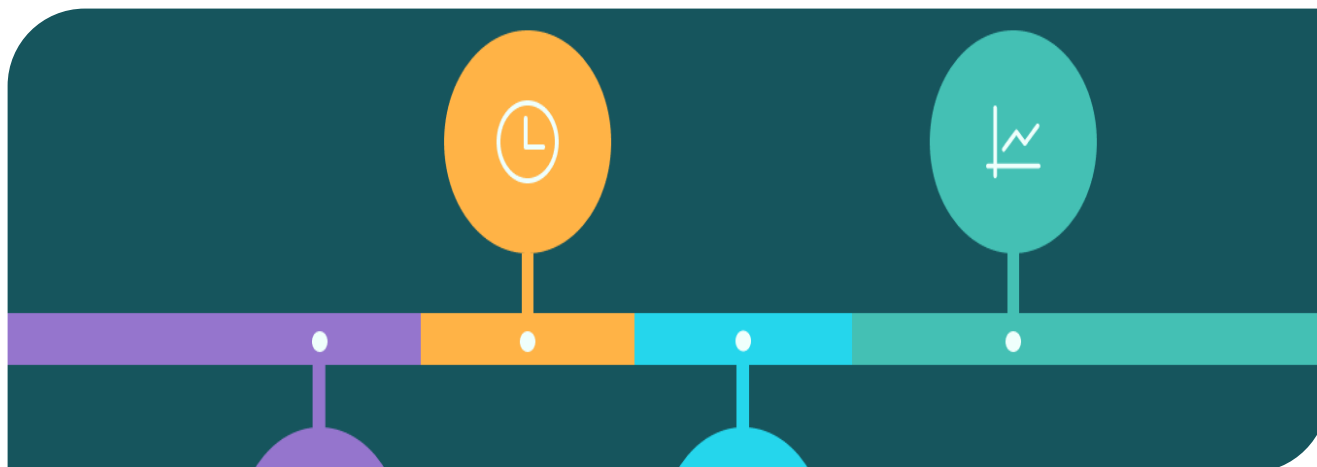
In modern online research, video has become a powerful tool. Whether used by participants or researchers, integrating video can add significant value to your study.

If you are planning to incorporate video, consider these key points:

- Is there a video introduction prepared to introduce the moderator, the team, and the community, helping to establish a sense of connection and encouraging participants to share video responses themselves?
- Would certain questions benefit from a video explanation that includes visual examples, especially for tasks with complex instructions or multiple steps?
- Are there questions where visual cues, like facial expressions and tone, would provide deeper insight into participants' responses?
- Could video compilations of meaningful participant responses enhance reporting and make insight presentations more impactful?
- How might video or media-rich activities be integrated creatively in the guide (e.g., having participants record messages or letters)?

Reflecting on these considerations will help you effectively integrate video, enriching the insights and engagement in your study.

Study timeline and time management



A key consideration for online studies is the time commitment required, both from participants and the research team. The total time involved, along with the structure, pacing, and segmentation of activities, plays an important role in sustaining engagement and maximizing response rates.

When planning your online study, think about the following:

- How can we design activities to keep participants focused on meaningful questions without unnecessary filler content?
- Are questions and tasks organized into smaller, more frequent activity sets to encourage targeted engagement and facilitate smooth progression through the study?
- Have you tested your design to ensure the estimated time commitment for participants aligns with what they'll actually spend?
- Is the allotted time realistic for completing activities as well as for any required interaction or discussion within the community?
- Are the incentives appropriate for the expected level of participant involvement?
- Does your team have sufficient time and resources to actively manage the community—responding to questions, prompting deeper insights, acknowledging participation, and sending reminders as needed?

Considering these aspects will help you build a well-structured study that respects both participants' and researchers' time, fostering engagement and a positive research experience.

Building community and engagement



A significant benefit of community-based online research is the ability to foster participant engagement and gather deeper insights through both individual interactions and broader group discussions.

If your study has a social component or aims to keep participants engaged, consider the following:

- In a smaller community, how will you engage with participants by reviewing responses and replying thoughtfully to ask follow-up questions, offer encouragement, and recognize particularly insightful contributions?
- For larger communities, what strategies will you use to comment on enough responses to keep momentum, sustain engagement, and maintain direction?
- What format will best support socialization within the study: a structured approach where participants complete activities then engage, an open discussion format, real-time socializing, or a combination?
- Would group interactions benefit from using @mentions to prompt multiple participants to engage around a highlighted response, rather than directing the same follow-up to individuals?

By addressing these points, you will create an engaging, interactive environment that encourages participation and enhances the richness of your data.

Getting in touch with us

Terapage help firms understand the trends and insights that matter to them, in the ways that matter to their respondents. We believe that great things happen when people really understand each other. That is why we offer an innovative way to research human needs, their behaviours, journeys, and personal experiences. Understand the humans behind the pie charts, the sentiments behind the analytics, the why behind the what, who, when and where. We help you experience what they feel at work, online, at home, and in store in a way that's not just innovative, but real, raw, rich, and very human.

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