TestingTime

Guideline for writing screener questions like a pro

Table of contents

Introduction 3

1. Setup of a screener survey 4
   - 1.1 Topic and profile criteria 4
   - 1.2 Screener structure 5

2. Question types 8
   - 2.1 Single-select vs. multiple-select questions 8
   - 2.2 Other formats 9

3. Question guidelines 11
   - 3.1 Neutrality 11
   - 3.2 Style 12
   - 3.3 Simplicity 13
   - 3.4 Specificity 14

4. Answer guidelines 16
   - 4.1 Style 16
   - 4.2 Consistent and comprehensive list of answers 17
   - 4.3 Logical structure 18
   - 4.4 Order 19

Screener checklist 21

INTRODUCTION

The screening of study participants is crucial for the quality of your study results. We know from personal experience that this is not always easy. But at TestingTime, we live and breathe screeners. For this reason, we have created a guideline on how to write good screener questions to identify the ideal people for your study. We want to share our expertise with you and show you our personal best practices with concrete examples for creating a screener like a pro.

1 Setup of a screener survey

It is important to start off right. So one of the first things you have to do is get yourself familiar with the topic of the research, the required profile and find the right screener structure.

1.1 Topic and profile criteria

Start by informing yourself about the topic and criteria to make sure you know how to ask proper questions. Please note that the language must be taken into account while setting up screener questions (English, German, French, etc.).

> **EXAMPLE**
>
> *Different mortgage contracts in Switzerland.*

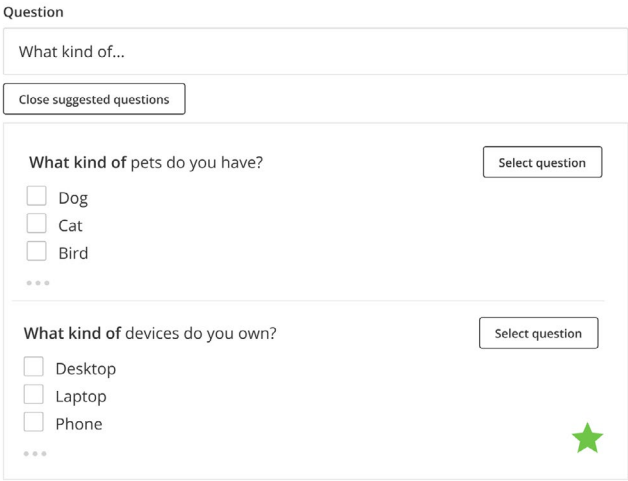
Make sure you understand the exact profile.

> **EXAMPLE**
>
> *Person has a driver's license vs. person owns a car vs. person drives a car.*

TIP #1

If you have more people at your company who screen study participants on a regular basis, then create a base of often used questions (top questions, see example). The goal is that another member of your company can reuse your questions.

EXAMPLE



1.2 Screener structure

Basically we advise you to build your question catalogue from generic to more specific, e.g. by using a top screener question right at the beginning. In this way, the study participants are filtered step by step and unnecessary invitations are avoided.

> **EXAMPLE**
>
> *When searching for people who are accountant, add the question about current employment status and exclude people who are students, looking for a job, housewife or retired. Or when looking for owners of a Tesla, add the question about the driver's license.*

> **EXAMPLE**
>
> *Ask if you have a pet before asking if you have a Siamese cat.*

Don't ask two things at a time – if you need to work with "and" / "or" in the question or answer, split the question so only one information is asked at a time.

> **EXAMPLE FOR A QUESTION**
>
> *"How would you rate the training and onboarding process?" also split this into "How would you rate the training materials?" and "How would you rate the onboarding process?".*

> **EXAMPLE FOR ANSWER OPTION**
>
> *"What is true for you?" with the criterion "I bought a mobile phone in the past month and I did this online.", ask two questions: "When was the last time you bought a mobile phone?" and "How did you buy your last mobile phone?".*

Double check the criteria: via open question or numeric entry.

> **EXAMPLE**
>
> *When looking for accountants in a company with 10-50 employees, ask "What is your exact job title? " / "How many employees work at your company?".*

TIP #2

Make sure the screener is not too long, i.e. too many screener questions (not including demographic questions and device questions). A proven rule of thumb is to use up to 5 questions, but never more than 8. If you are looking for different profiles you can make a screener for each one.

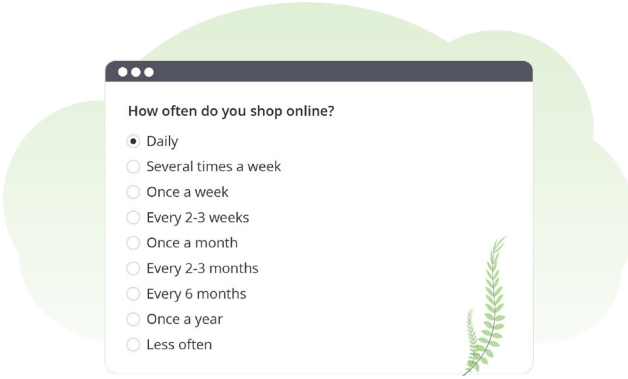
2 Question types

We offer a variety of question types, which can be used to your advantage. The following examples have proven to be the best solution for us in the past.

2.1 Single-select vs. multiple-select questions

Single-select: Use this when options are mutually exclusive (only one can be true, see image for example) or if you want the user to make one selection.

> **EXAMPLE**
>
> *"Which is your favorite app to buy tickets for public transport?".*



Multiple-select: If you want candidates to be able to select multiple applicable choices without limiting them in their selection.

At TestingTime the multiple-selection follows the principle of the "OR-rule". This means that all answer options marked with "Qualify" are independent of each other. This in turn means that out of a large number of answers marked with "Qualify", the selection of only one "Qualify"-answer is sufficient to allow the test user to proceed to the next step.

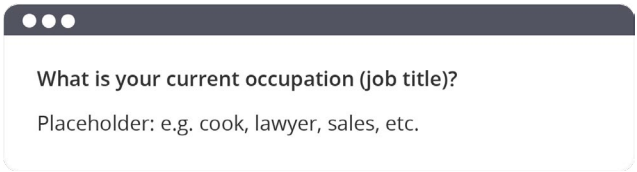
2.2 Other formats

Open questions: These types of questions are often very time consuming in terms of evaluation. We therefore advise you to use them as a priority if you only need to check the answer for a subset of people. I.e. rather at the end of a question catalogue in order to verify specific answers.

- **Double-checking criteria:**
  e.g. to check interest in watching sports online, ask "Which were the three last events you watched online?".

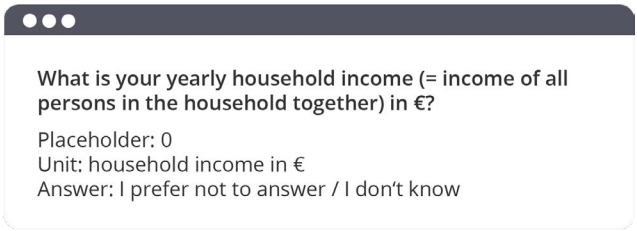
- **Getting additional information about the candidates after they were selected:**
  e.g. “What other sports are you interested in?”.

- **Ruling-out a specific option:**
  e.g. when you need to rule out a phone model, you can narrow down potential participants by asking for their phone brand (via radio buttons) and then ask them for the model in an open question – in the end you only need to look for the wrong model among those with the right brand.



Numeric questions (currently only available if screener questions are set up by TestingTime experts): These can be used to have strictly numeric values entered. They are also useful to double check criteria.

> **EXAMPLE**
>
> *“What is your yearly net income?”*



> **EXAMPLE**
>
> *“How many employees work at your company?”*

3 Question guidelines

When it comes to the questions, there are a few things to consider. These guidelines will help you to ask the questions correctly.

3.1 Neutrality

Avoid asking for agreement. People have a tendency to agree to any statement. So instead, try to give two alternatives.

> **BAD EXAMPLE**
>
> *Instead of "To which degree do you agree with this statement: I am a morning person."*

vs.

> **GOOD EXAMPLE**
>
> *Ask "At what time of the day do you feel more productive?" > "In the morning" / "In the evening"*

Questions can have an implicit direction as well – avoid "loaded questions" which push respondents toward an answer.

> **BAD EXAMPLE**
>
> *Instead of "How much do you like [...]?"*

vs.

> **GOOD EXAMPLE**
>
> *Ask "How would you rate [...]?"*

TIP #3

Don't ask questions with a yes/no answer – there is always additional information to be gained and fraud to be prevented by asking a question with more options. This is especially true for sensitive information.

Here it is important to ask neutral (non-judgmental) and think about a mindful answer scale, e.g. instead of "Do you want to quit smoking?" with "Yes"/"No", ask "Which statement is true regarding your smoking?" with answer options "I smoke but I would like to quit." / "I smoke but I would like to reduce it." / "I smoke." / "I do not smoke.".

TIP #4

For such questions, always add an answer option "I prefer not to answer this question."

3.2 Style

Be friendly, and polite. Check whether you are using gender-inclusive language (see here). You can change the perspective.

> **EXAMPLE**
>
> *Have the candidate end a sentence like "I am … single".*

It is nice for the candidate as it breaks repetitiveness of the questions (and hence might reduce perceived screener length). It might also help get more honest answers with critical information. When you make this perspective change, first introduce it to the user.

> **EXAMPLE**
>
> *"Please end the following sentence: I am ..." – even if it makes the question a bit longer, it avoids confusion on the candidate's side from the perspective change.*

3.3 Simplicity

Try to keep questions as short as possible without losing information.

> **BAD EXAMPLE**
>
> *Instead of "How would you generally rate your impression of [...]?"*

vs.

> **GOOD EXAMPLE**
>
> *Use "How would you rate [...]?"*

Use simple language – if there are technical terms (e.g. medicaments name like Ketoprofen) rewrite the expert term in simple words. In case you want only experts to understand, you do not need to rewrite, but include an extra answer "I don't know what [...] means.". Avoid single or even double negations.

> **EXAMPLE**
>
> *"How often do you not eat all the food you bought because it expired?", better ask "How often do you throw away food because it expired?"*

Again, only ask one thing at a time. If there are metrics/numbers involved, try to use some which are intuitive.

> **EXAMPLE**
>
> *Don't ask for yearly driven km in public transport (no one knows and it's hard to estimate), but rather the average number of rides per week (easy to think of/estimate).*

3.4 Specificity

Your questions should be super specific (no room for interpretation).

> **EXAMPLE**
>
> *Have you ever driven a car of the brand BMW?*

This question is not clear enough in terms of what is meant by „driven". Is it a driver or passenger? Also, it doesn't include whether you owned or just used the car.

TIP #5

If an exact distinction is needed, the question must be formulated more specifically, e.g.:

- Do you own a car of the brand BMW?
- Have you bought a car of the brand BMW?
- Have you ever driven a car of the brand BMW as the main driver?

Also specify ambiguous terms like lately (Do you mean during the past year / month / week?) or regularly active user (Is it weekly / daily usage?).

BAD EXAMPLE

Instead of "Which of these apps do you use regularly?" or "Are you actively using these apps?"

VS

GOOD EXAMPLE

Ask "Which of these apps do you use at least once per week?"

TIP #6

Once per week is a good rule of thumb, e.g. for app usage but for rarer activities (such as placing an order in a specific online shop), you can adjust the frequency.

4 Answer guidelines

Here is how to get honest answers from respondents and what answer options to choose, e.g. predefined list of answer options or a respondents answers in their own words.

4.1 Style

Be consistent through all answer options. If the answer option finishes a sentence started in the questions, also add a ".".

> **EXAMPLE**
>
> *"I am ..."*
>
> *"... Single."*
> *"... Married."*
> *"... Divorced."*

An answer option always starts capitalised (e.g. "More than 5 times"), except it's e.g. a brand or name which starts with a lower case like iPhone.

Generally, be simple and specific (like for the question, see 3. Question guidelines). For examples, use the abbreviation "e.g.".

Make sure you include both genders in the answer when necessary. User gender-neutral words if possible.

> **EXAMPLE**
>
> *Police officer instead of policeman (en)*

If this is not possible, use both terms.

> **EXAMPLE**
>
> *Actor / actress (en)*

4.2 Consistent and comprehensive list of answers

Please always take time to make your list of answers consistent and comprehensive. Especially try to take time to research alternative and more detailed answers.

> **EXAMPLE**
>
> *"Which of these apps do you have on your smartphone?" Do some research online and list the 8 most used apps in the world.*

The participant can only pick the ones he or she has on the smartphone. But take the time to make some research on what other answer options make sense. E.g. when asking for mobility apps – which ones are important?

Also, the range of numbers you give may influence answers when you give answer options with absolute numbers.

> **EXAMPLE**
>
> *Frequencies of 1-2 times per week / 3-5 times per week / ...*

TIP #7

If you ask for daily tv time and give 5 answer options between **60 min** and **240 min** you will have lower responses than with a range of **1h to 4h**, because people don't want to think.
Give a wide range to avoid strong bias and make sure to be consistent – that there is no gap or overlap between your steps, e.g.:

- **Avoid gaps:**
  1 child / 2-4 children / 6 and more children
- **Avoid overlapping:**
  1 child / 1-4 children / 4 and more children

4.3 Logical structure

For single choice questions, make sure your answer options are mutually exclusive – meaning by logic, only one of them can be true.

> **EXAMPLE**
>
> *"I just bought a car" and "I am currently looking for a car" can both be true and should not be options in one single choice question.*

Always make sure your answer options are "exhaustive" – this means everyone needs to be able to pick an answer which fits.

> **EXAMPLE**
>
> *With frequencies, the highest option should include "or more".*

TIP #8

If necessary, include an option like:

- ”Other”
- “None of the above”
- “I am not sure”
- “I prefer not to answer”
- “I don’t understand [...]”

4.4 Order

Think about the order of your answer options (if there is no numerical ranking like for duration or frequency). Make sure the answer you are aiming at is not always on top (move it around between questions).

For long lists of options (from 6-7 items), order them alphabetically. Make some exceptions in the following cases:

TIP #9

The “Other” option should always appear at the end.

> **EXAMPLE**
>
> *Content-related answer options such as “Health Insurance app” and “Other insurance app“.*

Well, there you have it. Our expertise summarised in this guide. And always remember, taking a little extra time can drastically increase your recruit's effectiveness. We speak from experience.

Are you ready to get started recruiting participants with TestingTime? Follow this link to start with your order to let TestingTime recruit your test users.

TestingTime

Screener checklist

Use the TestingTime template for a quick check of your screener.

1. Setup screener

- [ ] Get yourself **familiar** with the topic/criteria
- [ ] Understand your **exact test user profile**
- [ ] **Start with generic** questions and then go to specific ones
- [ ] Reuse existing questions from your team if you can
- [ ] Only ask **one information at a time** – split questions if necessary
- [ ] **Only write up to 8 questions**
- [ ] If you look for different profiles, split the order if necessary

2. Choose question format

- [ ] You can choose between **single-select and multi-select**
- [ ] Use **open questions** to double check critical information

Continued on next page ⟶

3. Question guidelines

- [ ] **Avoid** asking for **agreement**, especially don't use yes/no questions – try to give two ends of a scale instead (e.g. instead of "How much do you like [...]?", ask "How would you rate [...]?")
- [ ] Make sure your question is **short** and **easy to understand** (short sentences, simple words, explain expert terms...)
- [ ] On the other hand, your question needs to be **specific** and leave no room for interpretation (avoid specifying terms like „active user", "regularly",...)
- [ ] **Avoid "loaded questions"** which point the user in one direction

4. Answer guidelines

- [ ] Make your questions **visually appealing** (use consistently capital letter at the beginning and ".")
- [ ] Make sure you use **gender-inclusive language**
- [ ] When you need to come up with alternative answers, make some **research** about what other options are relevant to make the question reusable
- [ ] When you give options with numbers (e.g. frequencies: 1-2 times per week / 3-5 times per week / ...), give a **wide range** and make sure there is **no gap or overlap** between steps
- [ ] **Everyone** needs to be able to answer the question – Think about including an **extra option** „Other" / „None of the above" / „I am not sure" / „I prefer not to answer"
- [ ] **Vary the position** of the required criterion (don't always place it on top)

TestingTime

DESIGNING USER-FOCUSED PRODUCTS

TestingTime is the fastest and most modern platform for ordering test users for user research. We enable project managers and UX researchers and designers to order the test users they need in minutes. We take care of recruitment, provide a personal briefing and pay all participants.

More than 1500 companies all over the world recruit their test users with TestingTime in order to obtain unbiased feedback on user-focused web pages, mobile apps and physical products.