Checklist of Questions to Ask Potential Online Study Vendors

To help you choose a commercial tool that's right for your situation, we've created the following checklist of questions. These are questions that you should consider asking any online study tool vendor you're evaluating. Not all questions will be relevant to every situation, but many will.

1. **Cost**
    a. What is the cost per study?
    b. Is there a cost per participant?
    c. Are there any extra charges for certain data (e.g., clickstream data)?
    d. Do you offer a subscription model (e.g., for unlimited studies or participants within a time period)?
2. **Participants and Recruiting**
    a. How do you normally handle recruiting of participants?
    b. Do you have your own panel of potential participants? If so, what are the charges for using it? How large is it?
    c. Will you work with other panel providers?
    d. How does recruiting work if we provide our own participants?
3. **The Product Being Tested**
    a. Are there any restrictions on what can be tested?
    b. Can you test live sites as well as prototypes?
    c. Does the test require any code or other changes to the site?
    d. Can the site be inside a firewall (e.g., an intranet site)?
    e. Can the test just deliver tasks and questions and have the user testing something else (e.g., a phone-based system)?
4. **The Online Study Tool—for the Researcher**
    a. Is a website provided for setting up the study and accessing the data?
    b. Are there limits on the number of studies you can have at one time?
    c. Can different users be set up to use the online tool? Can they have different roles or permissions?
    d. Is it possible to save a study as a template for re-use? Or is it possible to copy a previous study's design?
    e. Does the tool support multiple languages?
    f. Is it possible to easily preview or pilot the study?
    g. Once the study is live, is it possible to make any changes?
5. **The Online Study Tool—for the Participant**
    a. Does the tool require the participants to download anything to their computer? Can they still participate without downloading it?
    b. If anything is downloaded, what is done with it after the study is over (e.g., is it removed)?
    c. Does the tool provide a progress indicator?
    d. What browsers and versions does the tool support? Has it been tested on all of them?

   e. Does the tool require a minimum screen resolution?
   f. Does the tool work on mobile devices (e.g., iPhone)?
   g. Can participants access the study instructions again any time during the study (e.g., via a link in the taskbar)?
6. **Study Setup**
   a. Do you provide assistance in setting up a study? Are there extra charges?
   b. Can the order of answer options for a multiple-choice question be randomized?
   c. Can logic be used to skip questions depending upon previous answers?
   d. Are there limits on the number of tasks or questions?
   e. Is there flexibility in the placement of the taskbar?
   f. Can "welcome" and "thank you" messages be fully customized?
   g. Can participants be redirected to a custom URL after the study?
   h. Can parameters (e.g., a participant ID) be passed to the study, or from the study to a follow-up URL (e.g., for an additional survey)?
   i. Can rules be set up to fill participant quotas based on screening criteria (e.g., if you want an equal mix of men and women, to stop accepting one if the quota is met)?
7. **Tasks**
   a. Can task order be randomized? Can one or more tasks be fixed (e.g., at the beginning or end)?
   b. Are user-generated tasks supported (where the participant defines the task)?
   c. Can the participant see the task description and the site at the same time?
   d. How does the participant indicate task completion?
   e. Is an option for giving up on the task provided?
   f. Can the task answer either be multiple-choice or open-ended? If multiple choice, is an "Other" option, with an input field, provided?
   g. Can tasks be chosen based on answers provided by the participant (e.g., about areas of the site they do or don't use)?
   h. Can tasks be randomly selected for each participant from a larger set?
8. **Task Data Collected**
   a. How is task success determined (e.g., by reaching one or more predefined URLs, by the answer to a question)?
   b. Is task time collected? If so, what all does it include (e.g., time to read the task, answer the task question, etc)?
   c. Can the participant provide comments on any task?
   d. Are rating scales or other questions supported for each task? How many and what questions can be asked before or after each task?
   e. Is clickstream data collected? Is it tied to the specific tasks?
9. **Self-reported Data Collected**
   a. What kinds of rating scales are supported (e.g., Likert scales, semantic differential)?
   b. Are standard sets of questions supported (e.g., the System Usability Scale)?
   c. Can the number of scale values on a rating scale be controlled?

   d. What types of questions are supported (e.g., single-choice radio buttons, multiple-choice check boxes, drop-down lists, open response fields, etc)?

10. Data Analysis

   a. Is an online tool provided for analysis of the data?
   b. Is it possible to access the data while the study is still "live" or does the study have to be closed?
   c. Can all of the data be exported or downloaded? What formats are supported (e.g., Excel, Word)?
   d. Is the data time-stamped (e.g., in case the site changes mid-study and you need to segment the data appropriately)?
   e. What visualizations are provided for task success data, task times, and self-reported data (e.g., bar graphs)?
   f. Are cross-tabs supported (e.g., looking at the task success data split by younger vs. older participants)?
   g. If clickstream data is supported, what visualizations and other analysis methods are provided for it (e.g., click heatmaps, analysis of most successful pages)?
   h. Are mechanisms provided for easily filtering out data for participants who weren't really trying (e.g., "speeders" and "cheaters")?