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ESM WORKSHOP SERIES · PART TWO

Implement the *Study*

Pilot, evaluate participant experience, build onboarding materials, then run at full scale.

By Louis Tay and Marilyn Uy

OVERVIEW

Four steps from pilot to full scale

Step one

Run a pilot study

A small sample, run properly, tells you what a large one would only tell you too late.

Step two

Assess participant experience

Recruitment, motivation and compliance — the three things that decide whether data arrives.

Step three

Create a participant handout

Everything a participant needs after the study team has stopped being in the room.

Step four

Run the full-scale study

Invite, hand out the materials, then watch response rates and act on them early.

STEP ONE

Run a pilot study

1

Recruit a small sample

10–15 individuals is enough to surface most of what is wrong.

2

Gather feedback on the study components

How long each survey takes, the timing and frequency of prompts, the items themselves, and whether the instructions are clear.

3

Use what the pilot tells you

The point of a pilot is to change the study — budget for the changes before you start.

STEP TWO

Assess participant experience

1

Recruitment

What strategies you use depends on your sample — and on what is in it for them.

2

Motivation

Keeping participants engaged is what keeps observations arriving in week three.

3

Compliance

Orientation and clear expectations, applied evenly across everyone.

Three questions to answer before you recruit

1 **What is in it for the participant?**

Compensation is one answer, but rarely the only one that works.

2 **What is in it for the company or institution?**

Access is granted by people who need their own reason to grant it.

3 **Why should they complete your study?**

Starting is easy to ask for. Finishing is what the design has to earn.

Maintaining motivation is vital to the project

1

Research alliance

Participants are part of the scientific process of learning and discovery, not a data source.

2

Feedback

Provide individualized feedback on their own growth and learning.

3

Show progress

Give participants information on their compliance rate over time.

Increase compliance before the study starts

1

Conduct a systematic participant orientation

An orientation everyone actually receives, not one that depends on who onboarded them.

2

Ensure everyone receives the same onboarding information

Variation in onboarding shows up later as variation in response rate.

3

State the expectations for completion

How many surveys, over how long, and what counts as finishing.

Regular follow-up is key

1. **Remind participants of the incentives**

   For low-response participants, the first intervention is usually the simplest one.

2. **Remind them of the thresholds**

   e.g., 80% completion for payment — a threshold nobody remembers is a threshold that does no work.

3. **Consider loss-aversion framing**

   “You lose a dollar each time you miss a survey, out of $30” lands differently from “you gain a dollar each time you complete one, up to $30.”

STEP THREE

Create a participant handout

The handout is what a participant has in week two, when the study team is no longer in the room.

Who and why

Title, contact details, and a short study rationale

- Phone and email that a participant can actually reach
- Why the study matters and how they are helping

What it involves

How the study is completed, and how long it takes

- Is there a baseline survey?
- Is there a follow-up survey?
- Expected frequency of prompts

What they get

Incentive and payment schedule, plus FAQs

- When a participant can expect to be paid
- Clarify terms like “in the moment” — the past hour, or the past five minutes?

STEP FOUR

Run the full-scale study

1

Invite participants

By account email or by access code, depending on how your sample was recruited.

2

Provide the handouts your team created

Study details, instructions for completion, and the FAQs.

3

Monitor response rates

Be proactive with low-response participants — the intervention that works in week one rarely works in week three.

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Where the monitoring actually happens

Once a project is launched, the Insights area tracks participation in real time — so a falling response rate is something you see rather than something you reconstruct afterwards.

Participation Log

Submission and response rates, per participant

- Overall and current metrics side by side
- Show or hide columns, and download the log

Messaging

Reach a participant without leaving the study

- Message participants directly from the log
- Set additional reminder notifications on a schedule

Payments

Balances and compensation in the same place

- Check balances from the Logs tab
- Top up funds from Settings → Finance

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NEXT IN THE SERIES

Part Three: Manage the Data

Cleaning, missing data, and the problematic responses that survive both.

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