**Indeemo Task List Template**

This document contains tips on creating a mobile optimized Task List for your research project on Indeemo.

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| **Before you begin**, we recommend you visit this page (<https://indeemo.com/getstarted>) to get all the info you need to set up a project on Indeemo e.g. Smartphone Requirements, Recruitment Info, getting an RFQ etc. If you have already visited this page, please read on! |

# **Projects, Target Groups and Task Lists**

On Indeemo, each unit of research is defined as a **Project**. Within each Project, you can set up multiple **Target Groups** which are essentially Segments or Groupings of respondents with similar characteristics e.g. gender, demographics, location or persona. These typically correlate with the screening criteria that you give to your recruiter.

Each Target Group is given a Task List which contains all of the Tasks or activities you need them to complete. Depending on your requirements, all Target Groups can use the same Task List or each Target Group can be given a different Task List.

Think of a **Task List** as a grouping of tasks that tells the respondents what they need to do. The Task List screen in the app is where the Respondent will repeatedly go to view their tasks and then respond as you instruct them to do.

Each Task List contains multiple Tasks which instruct respondents on what you need them to do. Respondents complete their tasks by uploading Photos, Notes, Videos or Screen Recordings (“Required Responses”). This is what a Task List looks like in the Respondent App:

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|  | When designing your Task List, please remember that your respondent will be using a Smartphone to read and respond to your tasks.  The image on the left shows what a Task will look like when Respondents are using the app.  So, what might look short and succinct here in the Word Doc may actually require a LOT of scrolling in the mobile app.  Hence it’s important to keep your tasks short, granular and succinct so that Respondents can quickly understand what they need to do, complete it and get on with their day.  This document contains tips on how to maximize your project engagement by making it as easy as possible for Respondents to do what you need them to do. |

# **Tasking Strategies:**

Indeemo supports three different tasking capabilities:

**All-at-Once Tasking**

* In this task list, all tasks will be shown to the respondent as soon as they register.
* This method of tasking is usually applied to pre-task projects where showing all of the tasks to the respondent at the outset will not bias or impact the quality of the responses.
* Respondents are free to complete the tasks at any time and in any order they wish.
* This format of tasking gives the respondent more freedom to complete their tasks in their own time and at their own pace.

**Scheduled Tasking**

* Scheduled tasking should be employed in the following scenarios:
  + Where you have a lot of tasks (>5) for the respondent to complete and showing them all of these tasks at once would be likely to overwhelm them.
  + Where tasks relate to a specific event or time e.g.
    1. you want respondents to watch a particular TV show at a particular time but don’t want to let them know what show until it’s actually about to start or
    2. for a sporting or entertainment event where you want to assign tasks either before, during or after the event
    3. for a transport / medical project where you want to task respondents when they are on a particular train or sitting in a waiting room for example.
* On Indeemo, tasks can be scheduled to be shown and – if needed – hidden at a particular date or time.

**Sequential Tasking**

* Sequential tasking should be used for projects where you want respondents to carry out tasks in a particular, linear sequence or where you do not want respondent’s to look ahead to upcoming tasks until they have completed their current task.
* Examples include **Path to Purchase, Shopping missions, Customer journeys, CX / UX** projects.
* In these projects, tasks are scripted to occur in a linear sequence and each task is assigned specific number of Required Responses“.
* When the Respondent uploads the exact number of Required Respondents, they are automatically sent a push notification telling them that the next task is available for them to view in the Task List screen of the app.
* This allow each respondent to move at their own pace which means respondents can be recruited in drips and can start at any time.

**Multimedia tasking:** it’s possible to embed **images** or **videos** in your Task Lists. This can be particularly useful for:

* Adding a welcome selfie video to your Task List introductions so that you can welcome the Respondents and explain what you’d like them to do. This has a big impact on engagement and completion rates.
* You can also embed media if you need to do some Ad testing, Concept testing or Product testing. It's a powerful way to get quick feedback from Respondents.

A task list can contain as little as 1 task and as many as you wish, but generally we recommend you show the respondent a maximum of 5-6 tasks at a time. This prevents them from getting overwhelmed by what you need them to do.

At the end of this Word doc, we have included a filled in [**Sample Task List**](#_Sample_Filled_In) that shows a typical in-home / in-store shopping and product sampling project.

We have also included a blank [**Task List Template**](#_Task_list_Template) that you should use to fill in the tasks for your own project.

# **Mobile Screen Recording**

Mobile Screen Recording is available as an optional upgrade to our standard pricing. With Mobile Screen recording, you can get Respondents to record how they navigate and use any website or app on iPhone and Android e.g. task them to start a screen recording, search for something on Google and then we will record the results they get, what pages they tap into, how they navigate that site and we record their voices as they talk through that process.

It’s really powerful for understanding the path to purchase or online customer journey. The output is a video (max 10 minutes) uploaded to the dashboard of their entire journey including their voice as they narrate what they are doing. More detail is available here: <https://indeemo.com/mobile-screen-recording-app>

# **Automated Video Transcription**

Automated video transcription is also available as an optional upgrade to our standard pricing. Currently available in English (French, German, Spanish, Chinese, Brazilian Portuguese and Japanese on the way) we partner with Microsoft to use their AI technology to automatically create text transcripts of the videos which can then be searched using our keyword tool.

Transcripts are not perfect. They can be anywhere from 80-95% accurate but the accuracy depends on the clarity of the speaker and the level of background noise. We partner with Microsoft for Automated Video Transcription. Transcription is a huge time saver when it comes to quickly telling you what is trending in a lot of videos. If you need more info on this, please contact us at [support@indeemo.com](mailto:support@indeemo.com)

# **Project Setup lead times**

Please allow **at least 1 working day** from submitting your Task List to it being set up by Indeemo.

**If this is your first project, please submit your project at least 2 working days before go live** so that we have time to arrange a demo and explain everything to you. This link has instructions on how to submirt your project for setup: <https://indeemo.com/getstarted#setup-project>

# **Support**

If you have any questions, contact us please at [support@indeemo.com](mailto:support@indeemo.com) and we will get back to you asap.

If urgent, call us on [+1 888 917 7480](tel:%2B1%20888%20917%207480) or [+44 845 528 0870](tel:%2B44%20845%20528%200870) or if you’d like to schedule a quick call please use this link: <https://indeemo.com/schedule-a-call>

Thanks,

Indeemo Support.

# **General Tips for Task List Design**

We’ve supported over a thousand projects. We know what works and what won’t. Here are some Tasking tips that will significantly improve your completion rates:

* **Give Respondents a clear introduction** so they are aware of the topic / goal of the project, how long it will take overall, when and where the tasks need to be carried out and what they are expected to do. Better still, include a selfie video of yourself welcoming them to the project and explaining what you want them to do.
* We always recommend you **start with asking the Respondents to record an intro selfie video**. This is a great way for them to try out the app and for you to get to know them.
* When scripting each task, **think about it from the respondent’s perspective**. Where will they be when responding to the task? How easy will it be for them to understand what they need to do? The simpler you make your tasks the more likely they will be to complete it and not wander off topic. (**Tip**: show your Task List to a colleague before you finish it. If they are struggling to understand it, it needs simplification).
* **Less is definitely more.** Your task should be read more like a Tweet than a Blog. So if you find yourself writing an essay, it's time to simplify your task or break it into multiple smaller tasks.
* **Make your tasks as granular as possible** (without being too closed ended). The more granular you make the tasks, the easier it will be for the respondents to complete each and that easier it will be for you to filter the responses to each task on the dashboard and analyze the responses. We generally recommend you never ask more than 3 questions in a task. If you have more than 3 questions to ask, consider splitting your task into a series of shorter tasks.
* **Be context aware**: think about the context in which the Respondent will need to complete their tasks. Will the respondent feel comfortable recording a video in line at a Starbucks for example or would a series of photos be a better way to capture what you are looking for in that situation? Videos are incredibly rich but might not be suitable for every situation. Be sensitive to how the Respondent might feel when completing their task.
* **Choose an appropriate Response Type** (Video, Screen Recording, Photo or Note) that is best for each particular task. Video is really powerful at capturing authentic behaviors and in the moment feelings / opinions. Where photos / screenshots with short captions are sufficient to detail what you want to capture, specify these instead. The best projects typically have a mixture of video, photo and note based tasks.
* **Let the Respondents surprise you!** The more open ended you can make your tasks, the more likely Respondents will be to surprise you. Projects where respondents are allowed some flexibility / creativity typically tend to be the most informative and the most successful at capturing hidden needs / unexpected behaviors.

On the next page there is a [**Sample Task List**](#_Sample_Filled_In) that shows how you a simple path to purchase project.

Underneath that, you will find a blank [**Task List Template**](#_Task_list_Template) which you can fill in for your own project.

# **Sample filled-in Task List** (for reference only)

This is a sample task list to give you an idea of what a Sequential Task List for a simple path to purchase study might look like. Tasks are brief, easy to understand and contain no more than 3 questions.

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| Brief introduction  Standard Tip Text (provided by Indeemo)  Task Title  Task Description  Required Responses  Completion message | Welcome to the our research project! Thank you for taking part.  Over the next **week** we would like you to use Indeemo to complete **4 tasks** related to purchasing headphones. This will involve some in-home tasks, an online screen recording and an in store shopping mission. Tasks are sequential, so after you complete Task 1, Task 2 will automatically appear here in the Task List below.  Once you have read and understood each task and are ready to respond, **simply tap on the + button on this screen**, choose the type of response that each task specifies (Video, Screen Recording, Photo or Note) and follow the prompts on each screen. When recording videos, please ensure:   * That your device is always in landscape mode. * That you are in a position with good lighting. * There is minimal background noise (if possible).   **1. Intro Selfie Video and Current Headphones.**  To get started, please record a 1-2 minute landscape selfie video and tell us a little bit about yourself:   * Who you are? * What you do? * Show us your current headphones and tell us what you like / dislike about them and why?   Required responses:  1 video  **2. Searching for new Headphones.**  We would like to understand how you use your mobile to decide which new headphones to purchase. Using the Screen Recording option on Indeemo:   * Ttake us on a journey of the various apps or websites you use to research, compare and select your next set of headphones. * As you navigate the various apps or websites, talk us through what you see on screen and * Explain any in-the-moment decisions you are making as you carry out your research.   Please stop your recording after you have decided on which headphones you wish to buy. If you wish to do multiple Screen Recordings, please do so. No detail is too big or too small!  Required responses: 1 Screen Recording  **3. Purchasing new Headphones.**  Once you have decided which headphones you wish to purchase, please go to the nearest store that stocks this brand. While in store, point your camera at the headphones display (showing us what your eyes are looking at) and record a video that shows us:   * What are your impressions of the various headphones on display? * What headphones are catching your eye and why? * Show us which headphones you want to buy and tell us why you made your choice.   If you wish to upload more than 1 video, please feel free to do so.  Required responses:  1 Video  **4. Using your Headphones for the first time.**  We would now like you to go home and record a video of yourself unboxing the headphones and trying them out for the first time. Please position the camera in landscape selfie mode so we can see both the box and your face in the recording. In your video tell us:   * What is positive or negative about your out-of-the-box experience and why? * While trying out your headphones for the first time, what is positive of negative about your experience and why? * Are you happy or unhappy with your purchase and why?   Feel free to record multiple videos if you wish. Your feedback is really valuable to us and no detail is too small!  Required responses:  A minimum of 1 video  That's it!  Thank you so much for taking part. We look forward to meeting you in person at the upcoming Focus Groups. Your incentive will be paid after you attend the group sessions. |

# **Blank Task List Template** (for you to fill in):

Please fill in the following tables with your instructions and tasks for the projects.

If you require different Task Lists for different Target Groups, please ensure you save a separate version of this Template for each unique Task List.

**Type of Task List**

Enter an X in the “Required” column. Please note you can only choose one Task List type.

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| **Type of task list** | **Required?** |
| **All-at-once Task List:**  All tasks and the completion message are shown to the Respondent as soon as they log in. |  |
| **Scheduled Task List**  Tasks and the completion message are displayed (and optionally hidden) at specified start / end times. Notifications for new tasks will be sent at the specified times. |  |
| **Sequential Task List**  Tasks will be displayed one at a time in a linear sequence. When respondents complete their current task, a Notification will be sent telling them their next task is ready. |  |

**Optional Upgrades**

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| **Upgrade option** | **Required** |
| **Mobile Screen Recording**  Would you like to upgrade your project to include [Mobile Screen Recording](https://indeemo.com/mobile-screen-recording-app)? | Yes / No |
| **Automated Video Transcription**  Would you like to upgrade your project to include Automated Video Transcription? | Yes / No |
| **Extended Video Duration**  We default videos to 3 minutes but can increase (or reduce) the duration if required. If you need videos to be longer than 3 minutes (max limit is 10 minutes) specify the duration here: | Specify duration (if >3min): |

Please note: if Mobile Screen Recording, Automated Transcription or Extended Video Duration have not already been quoted, the cost will increase.

**Target Groups**

Enter the names of the Target Groups who will be required to complete this task list.

For each Target Group, please provide the email(s) of the Recruiter / Moderator who the respondents can contact if they have any questions about the tasks / compensation etc.

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|  | **Target Group Name**  A short descriptive name that labels the Target Group / segment | **Moderator Email(s)**  Research colleagues who need moderator access |
| Group 1 |  |  |
| Group 2 |  |  |
| Group 3 |  |  |
| Group 4 |  |  |
| Group 5 |  |  |
| Group 6 |  |  |

*Add more rows if needed*

If you need help at any time, contact us at [support@indeemo.com](mailto:support@indeemo.com)

**Task List Introduction**

Use the following form to fill in your Task List.

If different Target Groups are doing different tasks, please create multiple versions of this Task List template.

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| **Task List Introduction Tips:** |
| Start with your introduction. We recommend you mention the following in your intro:   * Welcome the Respondent to the project, * Explain the purpose of the project (what you generally need them to do), * Confirm the duration of the project. * Confirm how many tasks in total they will need to complete. * If the tasks are Scheduled or Sequential, explain that tasks will be revealed over the course of their fieldwork. * If there is an out of home component, e.g. a shopping mission, please also mention this here so they can plan ahead. * We recommend you include your name and contact email in case they have any issues.   Finally, you can embed an intro selfie video from yourself after the project has been set up. You can do this via the Indeemo Manage Projects screen. Intro videos from you will have a huge impact on engagement and quickly builds rapport with the Respondents.  There is no need to include the video here. We will email you instructions on how to add it once the project has been set up. |

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| **Task list introduction:** |  |

Scroll down for Tasks.

**Tasks**

Here are some tips on how to design a task that makes it easy for respondents to understand and complete:

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| **Task Title and Task Description Tips:** |
| **Task Title:**   * The Task Title should be a short title that encapsulates the entire task e.g.   + “Intro selfie video”   + “Daily diary task”   + “In store shopping video task”   **Task Description:**   * The Task Description should explain the **PURPOSE** of the Task i.e. set the context for what you generally need them to do and ideally explain why. This will make it easier for the Respondents to grasp the objective of the task. * If the task requires them to be in a particular place or **location,** give them guidance on where they should complete the task e.g. “while standing in store…” or “find a private place and record a video to tell us…” * Tell them how they need to respond to the task e.g.:   + “Record a 1-2 minute landscape selfie video and tell us..”   + “Using a series of photos with written captions, tell us…”   + “Choose the Note option on Indeemo and tell us…”   + “Using the Screen Recording feature on Indeemo, do the following:” * Use bullets for your questions / to tell them exactly what they need to do. Use **bold** or underline font to emphasize important parts of the task. * **Use a maximum of 3 bullets / questions per task**.   + Going beyond 3 risks respondents going off topic and diluting the quality of the response.   + If you have more than 3 questions per task, consider splitting the task into a number of smaller tasks. It’s better to have a larger number of small, granular tasks than a small number of dense, heavy tasks.   + If you feel you must stick with a larger task, split the task into parts e.g. “Part A”, “Part B” etc. The reason behind this is it enables the respondents to work their way through their tasks without losing track and, more importantly, without wandering off topic.   **Required Responses:**   * Required Responses tell Respondents exactly what they need to do to complete the task. This ensures they can track their own completion and will minimize any confusion. * **For All-at-once or Scheduled task lists,** the Required Responses can be descriptive sentences e.g.:   + “1 video or at least 3 photos with captions” or   + “A series of screenshots with captions” or   + “At least 1 video and 3 photos with captions per day” * **For sequential task lists,** you need to exactly specify a number of Required Responses in order for the platform to move the Respondent onto their next task. The following inputs are supported: * Single responses: 1 Note, 1 Photo, 1 Video, 1 Screen Recording (if Screen Recording is being used on your project) * Multiple Responses: e.g. 2 Notes, 3 Photos, 2 Videos, 1 Screen Recording (or any number >1) * Boolean (AND/OR) options: e.g.: 1 Video or 3 Photos, 1 Photo or 1 Note, 1 Video AND 2 Photos |

Fill in your tasks overleaf:

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| **Task Title**  *(Short title that encapsulates what the task is all about)* | 1. Intro selfie. |
| **Task Description**  *(Max of 3 questions / task. This can include images or videos if needed)* | Please record a 1-2 minute, landscape selfie video to introduce yourself and tell us….. |
| **Required Responses**  *(Number and type of responses required to complete the task)* |  |
| **Start date / time**  *(Mandatory for Scheduled Task lists).* |  |
| **End date / time**  *Optional for scheduled task lists.* |  |

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| **Task Title** |  |
| **Task Description** |  |
| **Required Responses** |  |
| **Start date / time** |  |
| **End date / time** |  |

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| **Task Title** |  |
| **Task Description** |  |
| **Required Responses** |  |
| **Start date / time** |  |
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| **Task Description** |  |
| **Required Responses** |  |
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| **Task Description** |  |
| **Required Responses** |  |
| **Start date / time** |  |
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| **Task Title** |  |
| **Task Description** |  |
| **Required Responses** |  |
| **Start date / time** |  |
| **End date / time** |  |

*Copy and paste more rows as required.*

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| **Completion Message Tips:** |
| Finally, the Completion Message appears at the end of the Task List and tells the Respondent what happens next.   * On **All-at-Once** Task Lists it will be visible throughout the duration of the fieldwork. * On **Scheduled** Task Lists, it will appear at the end of the last day of fieldwork * On **Sequential** Task Lists it will appear as soon as the Respondents complete all of their tasks.   We recommend you use the Completion Message to:   * Thank the respondents for taking part. * Explain what happens next e.g. that you’re meeting them in a focus group or who will contact them and when. * Most importantly, tell them when you will be in contact and when they can expect to be paid ☺ * Another great technique is to record and embed a selfie video on Scheduled and Sequential Task lists. It is an awesome way to finish the project. |

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| **Completion message** | For example….  We look forward to viewing your posts.  We may be in contact via Indeemo with some comments / questions on your responses so please be sure to switch on notifications for Indeemo.  We will be in contact re next steps.  Thanks. |
| **Display Date / Time**  *(Mandatory for scheduled task lists)* |  |

Again, if different Target Groups need different task lists, please save multiple versions of this template and create a separate word doc for each Target Group’s task list.

Once you have finished your Task List, **click here for tips on how to submit your Project via the dashboard:** https://www.indeemo.com/getstarted#setup-project

If you have any questions, contact us at [support@indeemo.com](mailto:support@indeemo.com).

Thanks,

Indeemo Support.