

# Get the right participants for UCD studies in different markets

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**Localization is necessary when a foreign-designed study is conducted in the local market. Finding the right participants is crucial to the success of a UCD study. From the experience accumulated in our customer interview projects in China, we summarized several points that need to be considered for locating the right participants in a localized UCD study.**

Keywords: customer recruitment, localization

## Background

Thanks to the quick economic growth in developing countries, developing countries are becoming increasingly important markets to many multinational companies. A rising number of companies began to customize their products for these markets. To understand the local markets, UCD methods are applied to find out the market differences. These differences suggest where localization solutions can boost customer satisfaction and drive future sales.

## Issues addressed

In many UCD studies that aim to find out the market differences, the study project is designed by one core UCD team and conducted in multiple locations. By using the same instrument, it is hoped that geographic differences can be determined. Will the project goal be achieved by exactly following core team's design in different countries? Apparently, the answer is "no". The study must be localized because it will be conducted in different marketplaces, with different customers.

Getting the right participants is the prerequisite for the success of a UCD study. Without the right participants, all study results might turn out to be meaningless. Who are the right participants for the study in the local market? How can we get the right participants? As a China UCD team, we summarized several key points that need to be considered for customer recruitment, from the experience accumulated in our customer interview projects.

## **Localizing the sampling plan**

Sampling plan is the starting point of recruitment. You may select two participant groups of the same characteristics in two markets to get comparable results. But it is not always right. Sometimes, you need a group of participants with different characteristics to get comparable data. Different market situation might result in different sampling plans.

For example, in one customer interview project, the sampling plan required recruiting the companies whose employee number is within a certain range and who have the intention to purchase one type of IT device. During the recruiting, we found it was very difficult to find this kind of customers in the China market. In China, the IT development level is not as advanced as that in the U.S. The Chinese companies who consider purchasing this device usually have more employees. After discussing with the U.S team, we realized that the main purpose of this study is to understand the characteristics of the small customers who will buy this device. Since employee number is an underlying characteristic of interest, it should be different in each market. On the consideration of the market difference, we relaxed employee number constraint in China.

Another example is that, in U.S., we might want to proportionally sample 4 different industry segments, namely, manufacturing, retail, wholesale, and services. Suppose this resulted in a sample of size 10, 30, 20, and 40 respectively. We should not use the same sample sizes in China, because the proportions of these segments in China economy are different. Thus, the "industry segment" variable would be operationalized differently in the two countries.

Besides changing the values of some sampling variables, you might also need to add or remove some variables in the sampling plan.

Suppose you conduct a study to check the staffing situation of mid-market customers. In the U.S., the company ownership variable is not needed in the sampling plan because the ownership variable does not bring much impact on the customers' behavior in the U.S. However, in China, the mid-market customers can be sorted by three ownership types: state-owned or state-owned holding companies, private companies, and foreign-invested companies. The ownership variable impacts the Chinese customer's behavior. For example, the private companies and state-owned companies can adopt different hiring strategies. So when studying the mid-market customers in China, you might want to proportionally sample the companies of different ownership types to ensure unbiased result.

Before you start the recruitment, it is crucial for you to fully understand the objective of the study. Then this objective should be used as a baseline to check the sampling plan and adjust the sampling plan according to the local market situation.

## **Localizing the recruiting method**

Besides the sampling plan, the recruiting method should also be localized. From our project experience, we found that two points must be considered when localizing the recruiting method: local business process and cultural difference.

Even within one company, there might be different business processes or conventions in different locations. These differences will affect the customer recruitment process or channel.

For example, in the U.S., the IBM mid-market customers do not have close contact with some representatives from IBM. The UCD team can contact these customers directly for UCD study recruitment. However, in China, most IBM mid-market customers have their IBM client representatives who are in charge of all IBM related affairs with those customers. Under this process, it is inappropriate for our UCD team to contact the customers directly without sales representative's acknowledgement in advance.

Besides the local business process, cultural difference is another factor that should be considered. Through our project experience, we find that 3 dimensions of Hofstede's 5 culture dimensions are key to customer recruitment. They are:

- Power distance (The degree to which less powerful members of a culture accept the unequal distribution of power)
- Collectivism & Individualism (The extent to which people are expected to stand up for themselves, or alternatively act predominantly as a member of the group)
- Uncertainty avoidance (The extent to which a society attempts to cope with anxiety by minimizing uncertainty.)

In China, the power distance is much larger than in the U.S. When recruiting a customer company for a UCD study, even if you only need to interview a common system administrator, it will be better if you start your communication with their manager. Getting management approval is necessary before an invitation is accepted. If the manager supports your invitation, the later procedure will be very smooth. If you start the recruitment from a common employee, you might be rejected by their manager in the last minute after you have put much effort on this customer.

China is a collectivist society. In a collectivist society, harmony should always be maintained and direct confrontations should be avoided. [1] Chinese people attach great importance to society network. Recruiting will have higher acceptance rate if it is done through a person that the customers are familiar with. In our project, we found that recruiting through our client representative is an effective way because these people already have close relationship with the people in customer companies.

Uncertainty avoidance also needs to be considered. Since there are a lot of junk mails, an e-mail from a stranger is suspicious. In the early contact phase, phone contact is necessary, even if the correspondence must be initiated via e-mail. For example, before sending out a pre-visit questionnaire, you need to call the customer to inform them that you will send an e-mail for pre-visit questionnaire. After you have met them in person, it is not a problem to

do the later communication through e-mails. Based on Geert Hofstede's *Culture and Organizations: Software of the mind*, China's score in this dimension is quite close to the U.S.'s. [2] In our studies, we did not see much difference between U.S and China in this aspect.

## **Conclusion**

To conduct an effective localized UCD study, it is very important to find the right participants in local markets. Local market situation, business processes, and cultural differences are the factors that should be considered in recruitment. After checking these factors, both the sampling plan and the recruiting method should be adjusted accordingly. All the factors discussed in this study are based on our customer interview projects, but they can be extended to other types of UCD studies after evaluation.

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