

FREE SCREENING TEMPLATE

# Tester Screening Checklist

Recruit testers who give you the truth — not the polite answer. A field-tested framework for qualifying participants whose real behaviour, not their good intentions, predicts how your product will actually perform.

- 1 Targeting profiles and pre-written screening questions by category
- 2 A questioning method that gets honest signal instead of flattery
- 3 Red-flag and bad-data detection, plus quality controls
- 4 A weighted scoring rubric and pass / hold / reject decision tree

# Why screening decides everything

A product test is only as trustworthy as the people in it. Recruit the wrong testers and you don't just get weaker data — you get *confidently wrong* data that sends you shipping the wrong thing. Most bad test results trace back to the screen, not the survey.

Good screening does three jobs at once: it finds people who genuinely match your target customer, it filters out professional testers and bad actors, and — most overlooked — it asks questions in a way that surfaces the truth instead of the answer people think you want to hear.

## The core principle

**Ask about what people actually did — never what they think they'd do.**

People are unreliable narrators of their own future behaviour. They'll tell you an idea is great to be kind, claim they'd "definitely buy it," and overstate how often they do things. Anchor every important question to specific, recent, real events in their life. Past behaviour is evidence. Opinions about the future are noise.

## How to use this checklist

- Define your ideal tester in **Part 1** before you write a single question.
- Build your screener from Parts **2-4**; keep it to 8-12 questions so good candidates don't drop off.
- Apply the quality controls and red-flag filters in Parts **5-6** as you review responses.
- Score and decide with the rubric and decision tree in Parts **7-8**.

# Define your ideal tester

Screening for "everyone who might like it" returns mush. Write down who you actually need to hear from — then screen hard against it.

## Target profile

| CRITERION                                    | YOUR DEFINITION |
|----------------------------------------------|-----------------|
| Who this product is for (in one sentence)    |                 |
| Category they must already engage with       |                 |
| Behaviour that proves they have the problem  |                 |
| Minimum usage / purchase frequency           |                 |
| Demographics that genuinely matter (and why) |                 |
| Hard disqualifiers                           |                 |
| Sample size needed                           |                 |

### Watch the demographics trap

Age, gender, and income are easy to screen on but rarely the real driver. Lead with **behaviour** — what someone does and buys — and use demographics only where you can name the concrete reason they change the answer.

## Quota plan (optional)

| SEGMENT | TARGET COUNT | WHY IT'S IN THE STUDY |
|---------|--------------|-----------------------|
|         |              |                       |
|         |              |                       |
|         |              |                       |

# Demographic & eligibility screening

The baseline fit questions. Keep them tight, and only ask what you'll actually use to qualify or segment.

- ☐ Age range falls within target band
- ☐ Location is in scope (shipping / market / language)
- ☐ Household composition matches (e.g. has children, lives alone, pet owner)
- ☐ Relevant income or spending bracket
- ☐ Role / decision-making authority (for B2B: do they buy or influence the buy?)
- ☐ Lifestyle or life-stage segment relevant to the product
- ☐ No hard disqualifier present (see Part 1)

## Disguise what you're screening for

If candidates can see the "right" answer, some will give it to qualify. Bury the qualifying option among plausible alternatives, and avoid yes/no questions where "yes" obviously gets them in.

## Example — category usage (multiple choice, not leading)

"Which of the following have you bought in the last 3 months?" — list your category alongside 4-5 unrelated decoys, rather than asking "Do you buy [category]?"

## YOUR SCREENING NOTES

# Behavioural screening

The heart of a good screen. You're proving the candidate already lives with the problem your product solves — through what they've recently done, used, and paid for.

- ☐ When they **last bought or used** something in the category (a date, not "regularly")
- ☐ What they **currently use** today and what they pay for it
- ☐ How often they actually do the relevant activity — verified against a recent example
- ☐ What they've already tried to solve the problem (DIY, competitors, workarounds)
- ☐ The real trigger that made them buy or switch last time
- ☐ Evidence of spend: they already pay money, time, or effort against this problem

## Specifics over generics

### "Walk me through the last time..." beats "Do you usually...?"

Generic questions invite generic, flattering answers. A request to narrate one concrete recent episode forces real memory and exposes whether the behaviour is actually there. If they can't recall a specific instance, the behaviour probably isn't frequent enough to matter.

#### Question bank — behavioural (adapt to your category)

- "What did you buy the last time you needed [job-to-be-done]? When was that?"
- "What are you using for this right now, and what does it cost you?"
- "Tell me about the last time [problem] came up. What did you do?"
- "What have you already tried to fix this? What happened?"

# Truth-first questioning

How you ask determines whether you can trust the answer. These rules turn a screener from an opinion poll into an evidence check.

## 1 • Talk about their life, not your idea

Don't describe the product and ask if they'd want it — they'll be polite. Ask how they handle the problem today. The truth comes out regardless of what they think of you.

## 2 • Ask about the past, not the future

"Would you use...?" and "How much would you pay...?" are hypotheticals people answer optimistically. Replace every one with "When did you last...?" and "What did you pay...?"

## 3 • Dig for commitment

Real interest costs something. Look for candidates who have already given up time, money, or reputation against the problem — signal a stated "I'm interested" can't fake.

## 4 • Listen more than you talk

A screener isn't a pitch. Every sentence you spend selling is a sentence you're not learning from. Keep questions open and let them do the talking.

## Reframe the question — swap the left for the right

| DON'T ASK <span>OPINION / FUTURE</span>   | ASK INSTEAD <span>BEHAVIOUR / PAST</span>          |
|-------------------------------------------|----------------------------------------------------|
| "Would you buy a product that does this?" | "What did you buy last time you had this problem?" |
| "Do you think this is a good idea?"       | "How do you handle this today, step by step?"      |
| "How much would you pay for it?"          | "What do you currently spend solving this?"        |
| "Do you usually struggle with X?"         | "Tell me about the last time X happened."          |
| "Would you use this every week?"          | "How many times did you do this last week?"        |

# Quality controls

Filters that protect your data from professional testers, distracted respondents, and conflicts of interest.

## Professional-tester screening

- ☐ Asks how many product tests / surveys they've taken recently (frequent testers = caution)
- ☐ Checks for "straight-lining" — identical answers down a rating grid
- ☐ Open-ended answer is specific and on-topic, not generic boilerplate
- ☐ Completion time is plausible (not suspiciously fast)

## Attention & honesty checks

- ☐ At least one instructional check ("Select 'Strongly agree' to continue")
- ☐ A trap option — a fictitious brand / product they couldn't truthfully have used
- ☐ Two consistency questions that should logically agree

## Conflict of interest

- ☐ Does not work for you, a competitor, or in market research / advertising
- ☐ No household member in the above categories
- ☐ Hasn't tested this exact product before (unless wave testing intentionally)

# Red flags & bad-data signals

Even a qualified-on-paper candidate can produce worthless data. These are the tells that an answer is flattery or fabrication, not fact.

## Bad data — discount or discard

| SIGNAL                                               | WHY IT'S MISLEADING                                                         |
|------------------------------------------------------|-----------------------------------------------------------------------------|
| Compliments — "I love this", "great idea"            | Feels like validation, predicts nothing. Politeness, not commitment.        |
| "I would <i>definitely</i> buy / use this"           | A hypothetical future promise. Stated intent rarely survives a real wallet. |
| Generic claims — "I always", "I usually", "everyone" | No specific event behind it. Often an idealised self-image, not behaviour.  |
| Future / conditional answers — "I'd probably..."     | Speculation. Anchor back to a concrete past instance.                       |
| Eager to qualify, vague on specifics                 | May be telling you the answers they think let them in.                      |

## Recruit-rejection red flags

- ☐ Inconsistent answers across consistency questions
- ☐ Failed instructional or trap-brand check
- ☐ Can't produce a single specific recent example of the target behaviour
- ☐ Over-qualified on every dimension (too perfect = coached or dishonest)
- ☐ Conflict of interest disclosed or detected

# Scoring rubric

Turn judgement into a repeatable score. Weight what predicts good data — real behaviour and fit — above everything else.

| CRITERION                                                     | WEIGHT | SCORE 0-5 | WEIGHTED |
|---------------------------------------------------------------|--------|-----------|----------|
| Category behaviour & recent usage (evidence of real activity) | 30%    |           |          |
| Has the problem / evidence of spend                           | 25%    |           |          |
| Target-profile fit (demographic / segment)                    | 20%    |           |          |
| Answer quality (specific, consistent, on-topic)               | 15%    |           |          |
| Articulateness / willingness to give feedback                 | 10%    |           |          |
| <b>Total</b>                                                  | 100%   |           |          |

## Thresholds

### Pass • 4.0+

Strong fit and real behaviour.  
Recruit.

### Hold • 3.0–3.9

Borderline. Recruit only to fill a  
quota gap.

### Reject • <3.0

Weak fit or untrustworthy data.  
Pass.

### Disqualifiers override the score

Any failed attention check, conflict of interest, or trap-brand hit is an automatic reject — no matter how high the weighted score.

# Decision tree

Run every candidate through the same gate, in order. Stop at the first failure.

- **1. Eligible?** Meets demographic / location / hard requirements → if no, **reject**.
- **2. Clean?** Passes attention, trap-brand, and consistency checks → if no, **reject**.
- **3. Independent?** No conflict of interest → if no, **reject**.
- **4. Real behaviour?** Can cite a specific recent example of the target behaviour → if no, **reject**.
- **5. Score?** Weighted score  $\geq 4.0$  → **recruit**. 3.0–3.9 → **hold for quota**. Below 3.0 → **reject**.

## Recruit better testers, automatically

Portifer screens, recruits, and manages vetted consumer panels —  
so the people in your test are the ones whose behaviour actually  
predicts your launch.

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