

THE ENTERPRISE'S GUIDE TO
BUYING & DEPLOYING
**UX Research &
Insights Platforms**



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NOTE FROM THE AUTHORS



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We've spent the past 15 years partnering with renowned brands to develop excellent customer experiences across the physical and digital worlds. Without a doubt, the most significant and consistent driver of success is high-quality research that is accessible to decision makers across the organization.

Today, there are more tools than ever before to support the research function. In this guide, we'll help you navigate the landscape in order to select the right solutions for your team and organizations.

SECTIONS

I. Industry Trends

II. Product Comparisons

III. Resources

Featuring



SECTION I

Industry Trends

The pandemic upended industries and dramatically impacted consumer preferences and behaviors. While technology leaders have long recognized that consumer expectations are always increasing, the pace is now accelerating rapidly. Today's executives demand that their organizations operate on faster iterations, using customer feedback to inform decisions. It's a paradigm shift in culture, with research at the front center.

In the [Guide to Leveling Up Research Operations](#), there is an outline of the critical capabilities for research teams to achieve excellence in today's dynamic landscape. If you haven't already done so, it is recommended that you first familiarize yourself with that report and the rubric below.

		Stage 1 Beginning	Stage 2 Developing	Stage 3 Integrating	Stage 4 Optimizing	Stage 5 Insight driven	
Process	Conducting research →						
	Collaboration	Little collaboration or oversight. Stakeholders conduct "shadow research" across the organization	Oversight and provisioning of research tools across the organization	Researchers across the organization are collaborating on methodologies and tooling	Researchers are embedded on teams and initiatives to streamline high-quality research	Standardized intake forms, prioritized research projects, research involvement at key phases, and total visibility	
	Efficiency	Each research project is ad hoc, costly, and slow	The most commonly used methodologies are defined and repeatable	Standard operating procedures are being put in place to make research more defined and repeatable	All required methodologies are defined and repeatable	Speed-to-insight enables rapid data-driven decision-making across the organization	
	Presenting research →						
	Analysis	Little to no analysis beyond generating raw data	Ad hoc analysis is costly and slow	Insights are summarized but often lack context towards desired business outcomes	Analysis methodology and best practices are well defined and respected	Templates and tooling for analysis and alignment across the organization	
	Impact	Most research misses the mark and "sits unread in an inbox." Business stakeholders generally "fly blind" when making decisions	Data is cherry-picked from reports to reinforce previously made decisions	Recommendations are considered but lack follow through	Reports influence key decisions	All decisions are made with insights	
	Scaling research →						
	Longevity	Research is forgotten about immediately upon completion	Key stakeholders review research shortly after completion	Review meetings are held between researchers and stakeholders	Reports are digestible and shareable. They frequently circulate throughout and across departments	All research is tagged, organized, and discoverable by stakeholders for querying and reuse	
	Value	Value is unknown and undefined	General understanding that there is a positive ROI for avoiding bad decisions and discovering new opportunities	ROI is more defined but still lacks a connection to clear business outcomes	Continuous budgeting for ongoing and ad hoc research initiatives	Clear and well-defined price and ROI for each type of research compensated for by business units directly	
	People	Culture →					
People		There is no formal team or function for primary research, beyond perhaps traditional brand tracking studies	There is a small but dedicated research team but it cannot possibly keep up with the demands of the organization	Research department is created as an internal agency or embedded into product teams	There is a sizable and well-equipped research team that can handle strategic requests and parachute into initiatives as needed	There is both substantial demand and supply of research across the organization. Research is integrated into decision making processes	
Leadership		Leadership is indifferent about research	Leadership verbally acknowledges the value of research	Leadership supports research	Leadership invests in research	Leadership is involved in initiating and consuming research, and advocates for a culture of customer-centricity	
Systems	Technology →						
	Tooling	Procurement blocks technology acquisition with a preference for outsourcing to agencies	Procurement carefully considers technology adoption on condition of ad hoc usage for defined initiatives and budgets	Research has budget to purchase tools but a PoC is required	Research has a dedicated budget for technology and continuous availability and usage	Research has a mature budget for existing tools and continuous exploration for new technologies	
	Competency	Research relies heavily on an agency of record that is built on a long-standing relationship	There is a single power user for any existing tools, with limited usage or understanding within the research team	There are one or two power users of available tools but institutional knowledge is not documented or shared	There are multiple users within the research team, and well defined use cases and documentation	The organization is aware of the existing research tools, capabilities, and use cases. There is widespread adoption and collaboration	

Industry Trends

Virtually every process in research has been digitized in the past decade. Customer interviews can now be done remotely or even asynchronously with “unmoderated” interviews, focus groups can be facilitated with AI, and of course few surveys are still conducted with pen and paper.

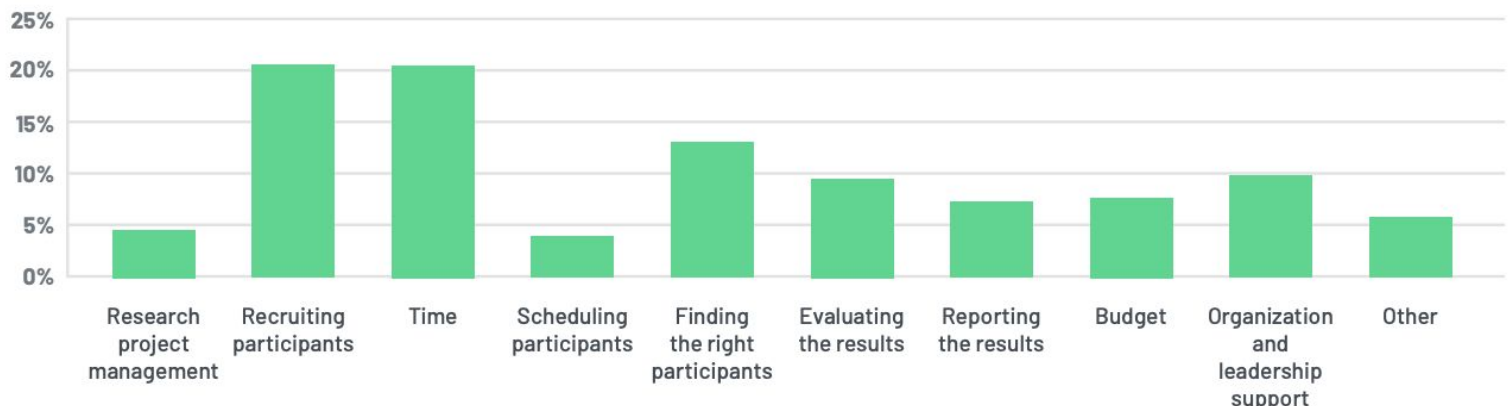
All of this is to say that on top of exponentially more decisions that need to be made within an organization, there are also exponentially more tools and technologies that research teams need to consider and master. Research teams need to construct a toolkit that meets the evolving needs of the organization. While that varies from organization to organization, it generally includes tools for conducting UX research and that storing insights for widespread access and querying.

Conducting UX research

Before we consider tools, let’s outline the requirements and capabilities needed for effectively executing on a study.

1. **Study strategy and alignment.** Fundamentally, research exists to inform decision making. Business stakeholders must have access to a standardized format to input their learning objectives and other key information and have visibility into the research team’s priorities, toolkit, and timeline.
2. **Methodology selection.** After aligning on learning objectives, your research team must select the right techniques to generate actionable insight. Generally, there’s a methodology and corresponding toolkit for qualitative and quantitative data generation.
3. **Participant sourcing.** You need a well-defined beta group or standing panel of participants eager to give feedback for research studies, with general access to current and prospective users/customers for occasional research needs.
4. **Time-to-insight.** The majority of studies are templated from input to output, powered by technology, and have predictable timelines and costs. Expertise and energy are reserved for the most bespoke and strategic studies. Most importantly, insights are generated before decisions must be made.

What is your most significant pain point or obstacle when it comes to conducting research?

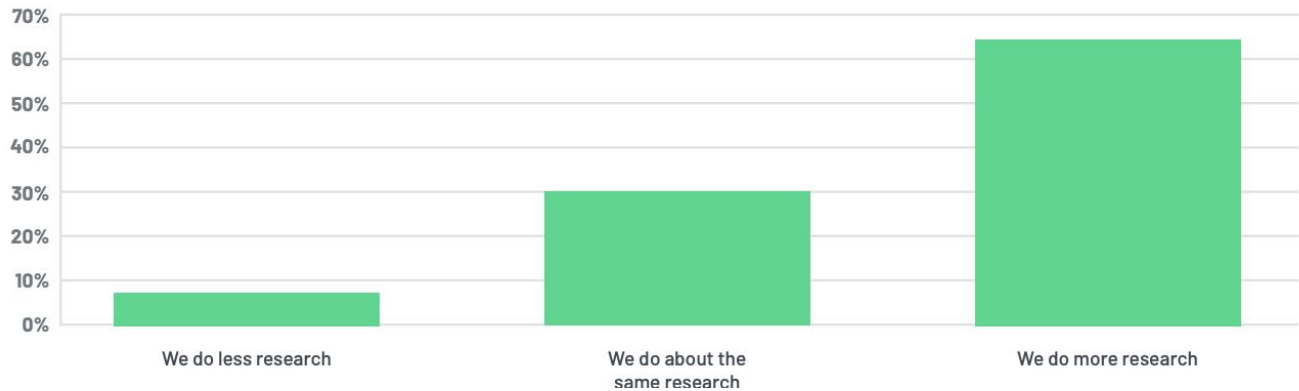


Industry Trends

Scaling insights

As a research team gains mastery over conducting and presenting research, the rest of the organization naturally develops a wider appetite and demand for research. The next challenges then are scaling research to satiate that demand and ensuring that insights are widely accessible afterward.

Compared to last year, how much research is your organization conducting?



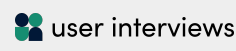
Survey of 100+ researchers from [Guide to Leveling Up Research Operations](#)

1. **Insight management.** The research team's job isn't done once they've conducted and presented research and informed key decisions. The study needs to be catalogued alongside other studies in a research and insights repository. A centralized repository exists for research conducted throughout the organization. Customer interviews are transcribed and queryable. Studies and insights are tagged, organized, and easily discoverable by relevant stakeholders. Institutional knowledge is documented and accumulates.
2. **Insight access and reuse.** Research is accessible via a research repository to relevant stakeholders with appropriate permissions. Each research study has potential upside via discovery by new stakeholders on an ongoing basis.
3. **Impact & ROI.** The research queue is prioritized based on relatively objective metrics related to urgency and impact. There is widespread visibility and alignment on priorities. The volume of research grows and the queue is managed effectively with business stakeholders eager but generally content with pacing.



SECTION II

Product Comparisons for conducting UX research



Study strategy
and alignment

**Research
planning**

Collaborative document and task management

×

×

×

**Expert
support**

Team available for study planning, design, execution, and analysis

Professional services available

×

Dedicated research partner available

Methodology
selection

Surveys

×

×

×

Robust library of survey templates

Interviews

Dedicated Zoom app for moderated UX interviews

Robust library of interview templates for moderated or unmoderated interviews

×

Robust library of interview templates for moderated or unmoderated interviews

Participant
sourcing

**Proprietary
panel**

Proprietary panel and third-party panel integrations

Proprietary consumer panel

Proprietary consumer and B2B panels

Third-party panel integration

**Niche
recruiting**

Custom recruiting with a specialized focus on verified B2B professionals

×

Live intercepts combined with first-party panel management

Live intercepts

Time-to-insight

**Automated
analysis**

Transcription and tagging

Transcription

×

Quantitative industry benchmarks

**Interactive
reporting**

Highlight reels, exports, and integrations

Video clips and CSV export

×

Video clips and CSV export

Pricing

Start free; flexible pricing & discounts for enterprise tiers

Custom pricing for enterprise

Pay as you go per interview or \$175/month for lightweight version

Begins at \$500/month for lightweight version. Custom pricing for enterprise.

**Recommended
for**

Global organizations with mature research teams that need enterprise-grade customer interviews and support.

Research teams that need basic unmoderated interview capabilities.

Early stage startups on a budget seeking DIY workflows.

Research teams that want an all-in-one platform for all UX research capabilities.

SECTION II

Product Comparisons for scaling insights



Management & categorization

Tagging

Zoom app for Live Note-taking and real-time tagging, with tagging selected text in transcripts

Select text and tag transcript to build video highlights across recordings

Select text and tag to build a taxonomy

Collaborative note-taking with AI-assisted tagging

Integrations

Native integrations with Zoom and Google Drive, and custom for any other too or workflow.

Native integrations with Zoom and Google Drive, and 3,000+ more via Zapier

Native integrations with UserZoom, Slack, Jira, Google Drive, Dropbox, Box, and Zoom

Limited set of native integrations

Access & reuse

Search & filter

Intuitively search across metadata, tags, transcripts, and notes to source insightful moments from research

Search the full text of research data and insights across all projects in your workspace

Search text with smart suggestions

Search text and tags

Unlimited seats

Included in every plan to ensure seamless adoption

Pay per researcher with unlimited read-only viewers

Pay per researcher with unlimited read-only viewers

Pay per researcher

Highlight reels

Slice-and-dice raw user interviews into on-demand insight clips

Reports with text and analysis

Reports with text and analysis

Slice-and-dice raw user interviews into on-demand insight clips

Usage analytics



See which teammates have viewed stories and start conversations with comments and mentions



Expert services

Team available for study planning, design, execution, and analysis



Personal onboarding and training

Pricing

Start free; flexible pricing & discounts for enterprise tiers

Begins at \$15/month per researcher

Free for 1 researcher and then \$9,000/year for 4 research users

Begins at \$33/month per researcher

Recommended for

Global organizations with mature research teams that need seamless workflows and integrations across their research tools.

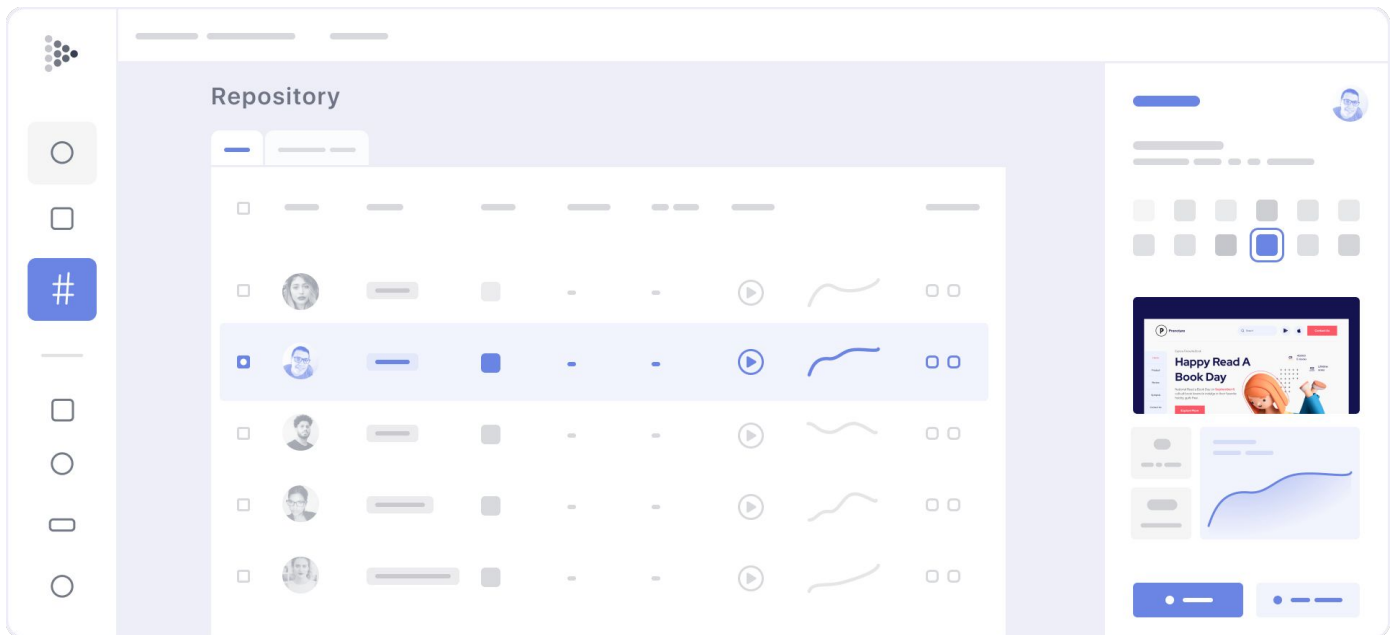
Nimble venture-backed companies with integrated product and research teams.

Mid-sized organizations that store most files in cloud services and do research in UserZoom.

Organizations that want a dedicated repository and to conduct research elsewhere

Product Comparisons

Tetra Insights



Tetra is the End-to-End Insights Enablement Platform, making it easy to turn your user research into valuable insights. The platform is built for global research and design teams who depend on reliable, sharable insights.

Pros

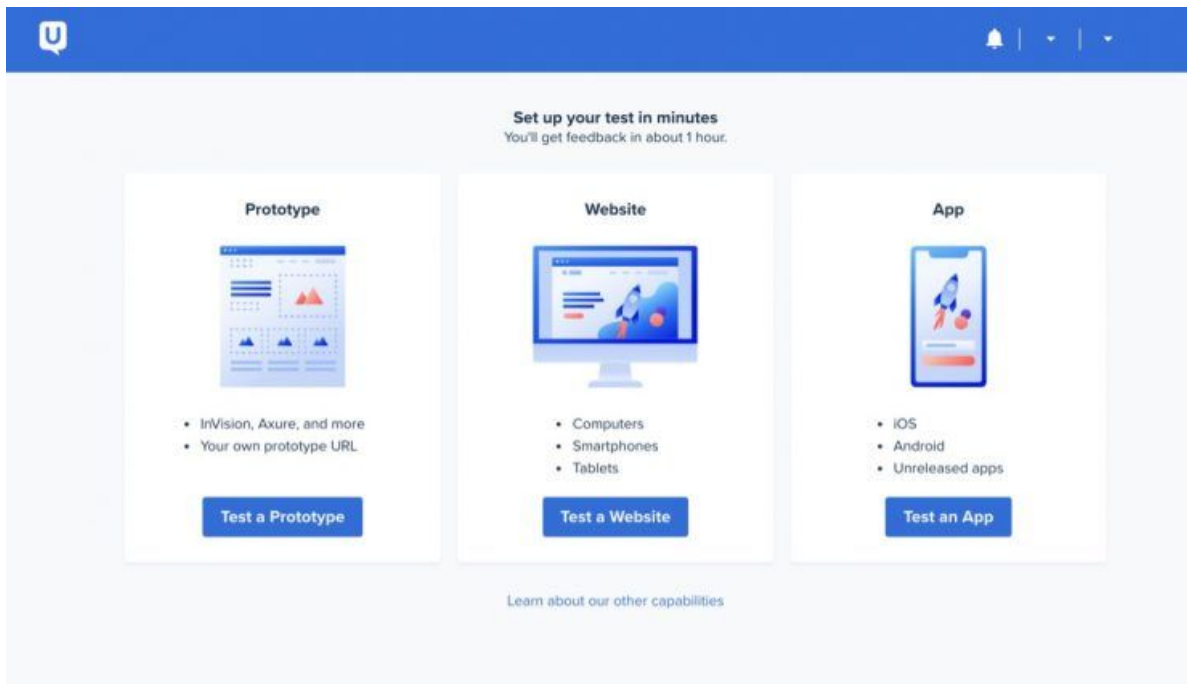
- Dedicated Zoom app for powering user interviews
- Import any data type
- Native qualitative research capabilities with video transcription
- Native repository capability for easily querying insights by tag or transcript
- Unlimited users for seamless adoption
- Highlight reels to power decision-making
- Easily integrate with other research platforms
- Start for free with flexible pricing and annual discounts for enterprise tiers

Cons

- Survey capability requires integration with third-party
- Lacking in-depth usage analytics

[Read G2 reviews →](#)

UserTesting



As the market leader for on-demand unmoderated interviews, UserTesting has become a household name in the research community.

Pros

- Templates for all common research studies and learning objectives
- High-quality proprietary panel of consumers
- Software is easy-to-use

Cons

- Limited access to B2B participants
- Restrictions around importing / exporting data
- Enterprise pricing only

[Read G2 reviews →](#)

Product Comparisons

User Interviews

USER INTERVIEWS Projects Participants Dennis New project

Help us test a new app! [🔗](#) [↗](#)

Manage participants Edit confirmation email Invite participants Export data

Showing 1 - 40 of 256 1 2 7 »

<input type="checkbox"/>	Name	Status		Email	Phone	Age	Education	Martial Status	Race
<input type="checkbox"/>	Jonathan Snow	Confirmed 6/18/18 @ 4pm	Reschedule	timothy_90@gmail.com	(762) 633 3854	21	Tertiary education	Single	Hispanic or Latino
<input type="checkbox"/>	Mason Wilson	Confirmed 6/18/18 @ 4pm	Reschedule	william_60@esc.com	(581) 417 5087	26	Bachelor or equivalent	Married or in a civil union	African American
<input type="checkbox"/>	Gary Santos	Confirmed 6/18/18 @ 4pm	Reschedule	santos4gary@hotmail.com	555-444-2828	24	Bachelor or equivalent	Single	African American.
<input checked="" type="checkbox"/>	Jennifer West	Confirmed 6/18/18 @ 4pm	Reschedule	jennifer@west.com	(708) 850 9201	22	Tertiary education	Single	Asian
<input type="checkbox"/>	Tyler Rice	Confirmed 6/18/18 @ 4pm	Reschedule	tyler@microsoft.com	(805) 447 7226	22	Secondary education	Single	White
<input checked="" type="checkbox"/>	Ann Perry Snow	Confirmed 6/18/18 @ 4pm	Reschedule	ann@riff.com	(162) 960 6735	25	Bachelor or equivalent	Married or in a civil union	White
<input type="checkbox"/>	Estrada Katerine	Confirmed 6/18/18 @ 4pm	Reschedule	SxSv@gmail.com	(498) 311 8102	20	Tertiary education	Single	Hispanic or Latino
<input type="checkbox"/>	Allan Ronald	Confirmed 6/18/18 @ 4pm	Reschedule	winterfel4eva@hotmail.com	(691) 521 7715	24	Tertiary education	Divorced	White
<input type="checkbox"/>	Xyung Do	Confirmed 6/18/18 @ 4pm	Reschedule	doxyung13@outlook.com	(845) 451 5545	23	Tertiary education	Single	Asian

2 participants selected - Select all 25 confirmed participants Cancel Message Reschedule

User Interviews is focused on being the most powerful research participant recruiting and management capability, with a proprietary panel of 700,000 participants.

Pros

- Access to a proprietary panel to supplement first-party participants
- Incentive management and integrations with survey capabilities
- System-of-record for user feedback to prevent participant fatigue
- Calendar booking for interviews

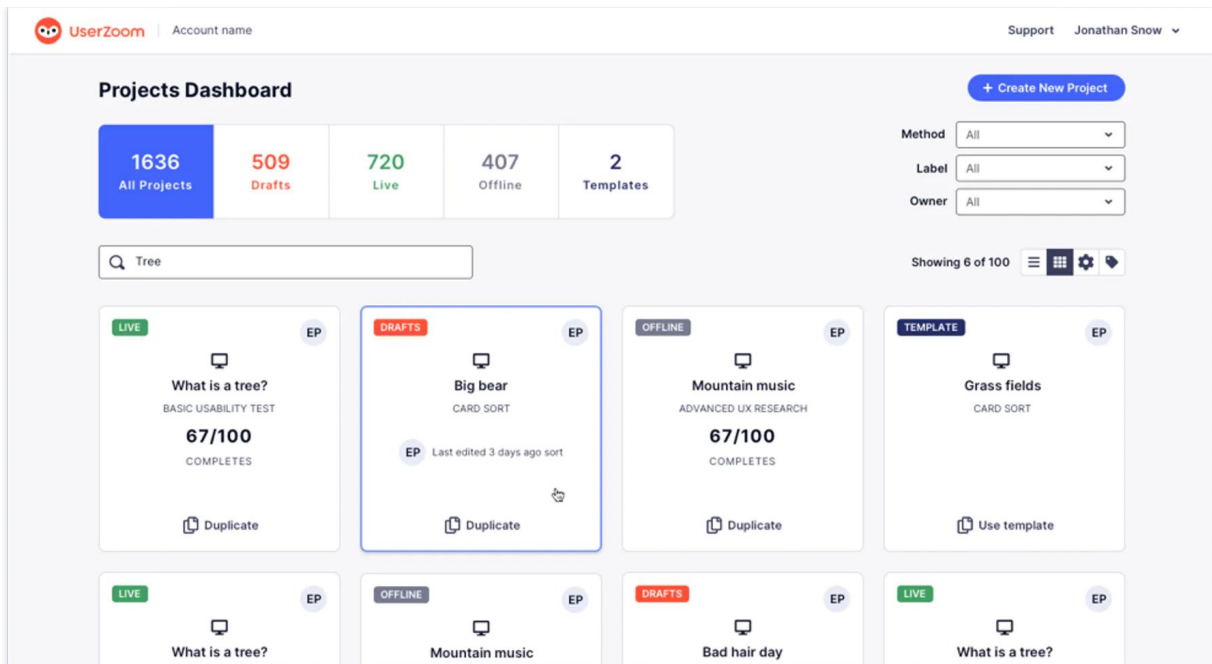
Cons

- Lacks a built-in qualitative or quantitative research capability beyond participant management

[Read G2 reviews →](#)

Product Comparisons

UserZoom



Aiming to be the all-in-one research platform, UserZoom's acquisitions of Validately and EnjoyHQ give it survey, interview, and repository capabilities.

Pros

- Surveys, unmoderated interviews, moderated interviews, and repository all integrated into one platform
- Third-party panel integrations, proprietary panel, and first-party participants all available
- Comprehensive list of native integrations for insights repository

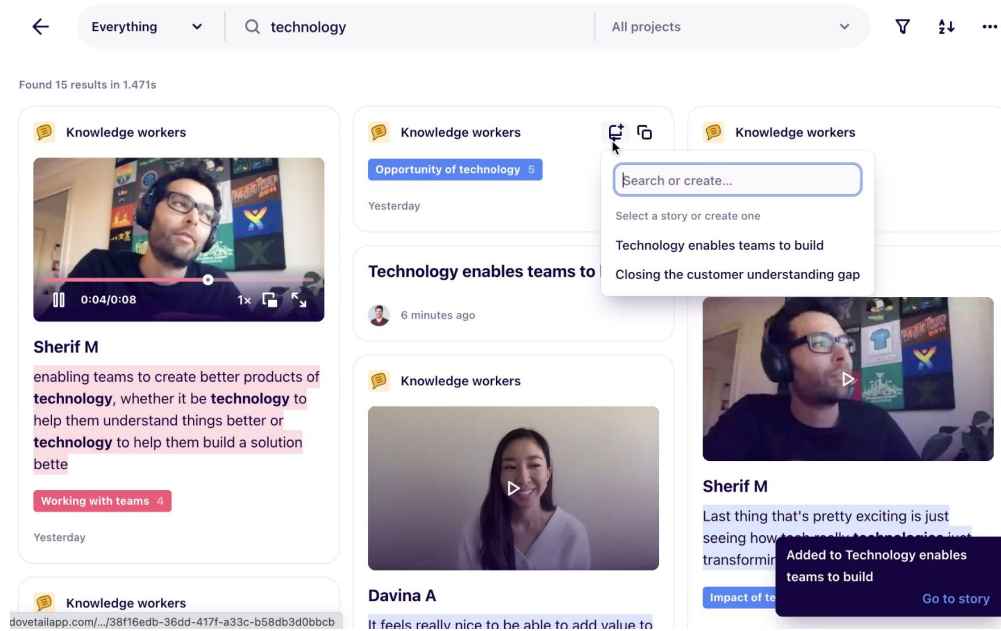
Cons

- Disconnected and dated experiences for each capability
- Complex pricing across each product

[Read G2 reviews →](#)

Product Comparisons

Dovetail



Dovetail is democratizing research with a slick platform for storing insights, generating interactive reports, and managing participants.

Pros

- Impressive and intuitive user experience
- Automated insights and sentiment analysis
- Simple pricing and feature set

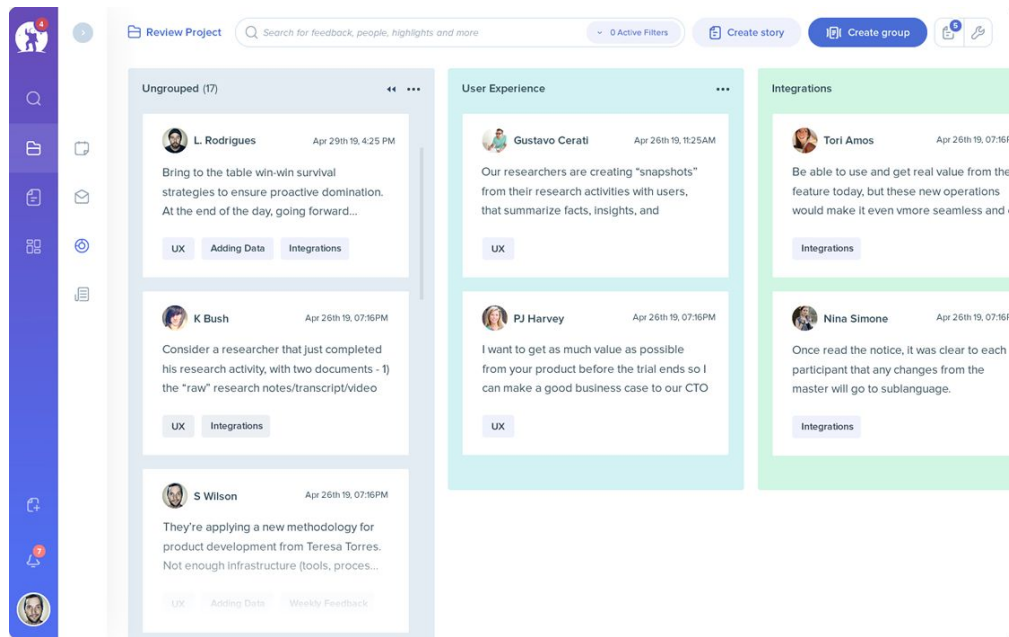
Cons

- Limited customer assistance and expert research services
- Lacks participant recruiting capabilities
- Limited set of integrations
- Lacks native capabilities for conducting research
- Primarily qualitative insight oriented

[Read G2 reviews →](#)

Product Comparisons

EnjoyHQ



Now part of the UserZoom umbrella, EnjoyHQ benefits from being both a powerful repository and integrated with qualitative and quantitative research capabilities.

Pros

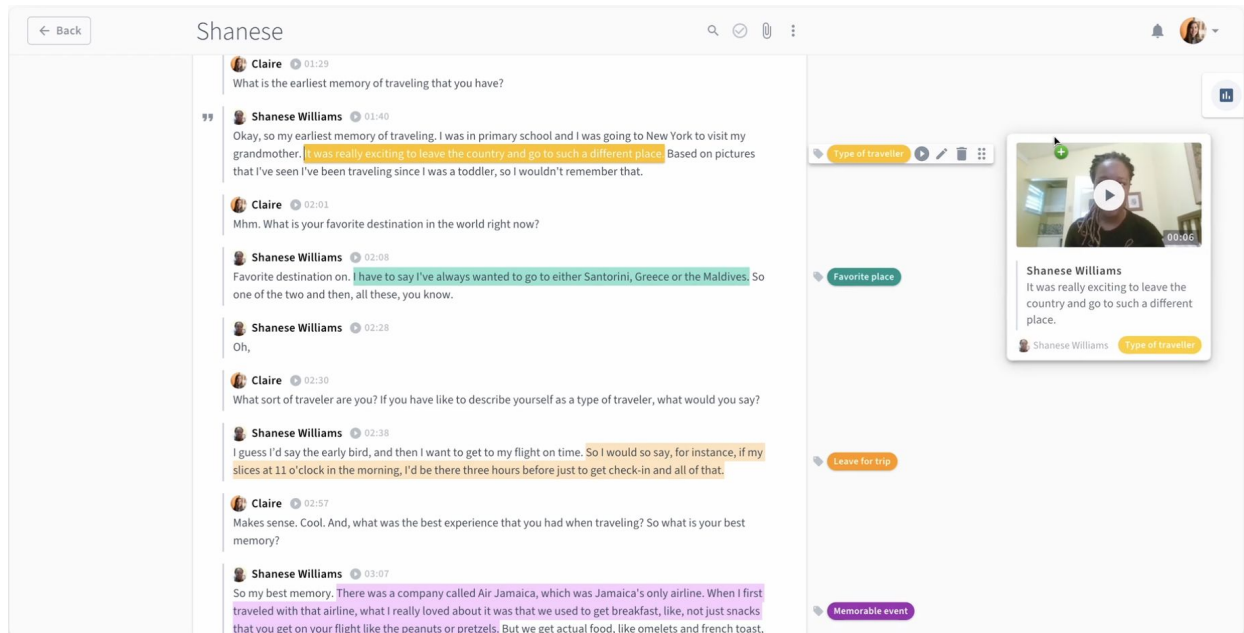
- Extensive set of native integrations
- Unlimited storage and transcription on all plans
- Focused on storing qualitative and quantitative insights

Cons

- Primarily focused on storage and classification, less on analysis or reporting
- Expensive for more than one researcher
- Ongoing integration into UserZoom suite is primitive

[Read G2 reviews →](#)

Condens



Focused on qualitative data analysis, storage, and querying, Condens is a powerful repository for user interviews.

Pros

- Automated tagging and clustering accelerates insight categorization
- Slide and dice interviews into highlight reels
- Project-based pricing available

Cons

- Lacks participant management or recruiting capabilities
- Very limited set of integrations
- Lacks native capabilities for conducting research
- Primarily qualitative insight oriented

[Read G2 reviews →](#)

