

iHUT Checklist



Strategy & Methodology

- ❑ **Define Objectives:** Determine the primary goal, (assessing performance, uncovering needed improvements, comparing to competitors, testing a cost-reduced formula, etc.).
- ❑ **Select Test Design:** Use a ***Monadic design*** when possible. Testing one product at a time simulates real life, eliminates interaction and suppression effects, and allows for the development of normative data.
- ❑ **Standardize the System:** Ensure identical methodologies, data preparation, and analytical methods are used from test to test, including using the same research company.
- ❑ **Build a Normative Database:** Build a normative database from the results of the standardized system. This continually improves your ability to interpret scores and makes successive tests more meaningful and valuable.

Target Audience & Sampling

- ❑ **Define the Relevant Universe:** Test products among category users. For well-established brands, ensure you have a readable subsample of brand users; for brands with low market share, place more weight on the opinions of nonusers.
- ❑ **Match Samples:** Ensure respondent groups across different product "cells" are matched on key variables so differences in ratings reflect the product, not the sample.
- ❑ **Set Sample Size:** ***Target 150 to 200 completed interviews*** per test product (cell).
- ❑ **Plan for Overrecruitment:** Overrecruit by ***15% to 40% (or more)*** to account for participants who do not complete the test.

Questionnaire Design

- ❑ **Overall Measures:** Include core metrics such as an overall rating (often an 11-point scale).
- ❑ **Diagnostic Ratings:** Use 3-point or 5-point scales for attributes like appearance and freshness.
- ❑ **Open-Ended Questions:** Ask consumers what they like most, what they dislike, and for any suggested improvements.
- ❑ **Context and Usage Questions:** Include questions about who in the household used the product, usage occasions, ease of use, etc.

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Product Preparation & Logistics

- ☐ **Control the Variables:** Ensure identical product preparation, age, packaging, and labeling for all test products.
- ☐ **Branded vs. Unbranded:** Decide whether the test will be unbranded ("blind") for the cleanest measure of product performance or branded to measure real-world perceptions.
- ☐ **Calculate Inventory Needs:** Determine the quantity of product per respondent, the duration of test usage, and secure extra product to cover potential shipping damage and overrecruitment.
- ☐ **Plan Distribution:** Establish logistics for getting products to participants (e.g., priority mail, overnight) while considering specific packaging, temperature control, and sanitation needs during handling.
- ☐ **Provide Clear Instructions:** Include precise product-preparation, usage, and survey-completion instructions in the package.

Analysis

- ☐ **Leverage Normative Data:** Compare your test results against your database of test results to correctly interpret scores and utilize action standards.