**PLAYBOOK** 

# EXPLORATORY RESEARCH

+ research guide templates

Understand your customer to generate new ideas, strategize and grow

yasna.ai **Yasna** 

# Introduction

This playbook is about how exploratory research helps generate and refine product and marketing ideas. It offers a simple and structured approach to gaining new insights about users and connecting those insights directly to the creative process.

Whether you're running research yourself or working with external partners, and regardless of the method you choose, this approach will help you build a solid foundation for making "everyday empathy" part of your workflow.

It's for anyone expected to come up with ideas: brand and product managers, marketers, creatives, and researchers.

#### **About Yasna**

Yasna is an all-in-one platform for market research, powered by Al. It automates in-depth interviews and supports researchers at every stage of the interviewing process, from setup to reporting.

Yasna combines quant scale with qual depth making sure you catch all the insights and validate them instantly. Fast and efficient, Yasna is the go-to solution for exploratory research when resources are tight—helping you understand people for product development, even with a small team.

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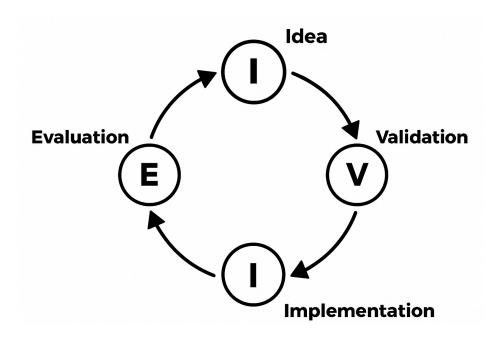
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# **Starting Points**

# Ideation as Business Process

Let's look at the classic cycle: IDEA – VALIDATION – IMPLEMENTATION – EVALUATION.

Nearly every product evolves this way. Ideas emerge, get tested (or not), some are implemented, results are reviewed—and the cycle repeats.



At the IDEA stage, the goals are:

- To find ideas (generate them)
- To develop ideas (shape, make them concrete, express them clearly)

An idea can be anything—a new business, a product, a feature, packaging, an ad, or even a tiny UI tweak. Like figuring out where to place a button for better conversion. Big or small, ideas need to be discovered and refined.

#### In short:

You need to come up with ideas.

If the team stops generating ideas, progress stalls. So ideation should be a systematic, ongoing process inside any company.

# The Real Work Happens in the Manager's Head

Here's the catch: the idea has to appear in the manager's brain. Nowhere else. Their internal neural network processes incoming information and transforms it into ideas.

New information is key here. In fast-changing environments, past experience can quickly lose relevance. To keep coming up with ideas, managers need fresh input.

The question is: what kind of new information fuels good ideas?

# Surprise as a Tool

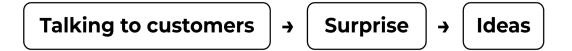
Great products solve real human problems. That means the best idea-generating input is new insight about user needs.

A need is a subjective feeling of something missing—often hard to articulate. To understand needs, you have to talk to people. That's what qualitative researchers do. Let's say you've talked to 20 customers. How do you spot the real insight in all that data?

Claude Shannon (the father of information theory) said:

"The amount of information in a message is proportional to how surprising it is."

Imagine you've never seen a duck. You meet one and it says "quack." You're surprised—that's new info: ducks quack. It says "quack" again—now you're not surprised. The second quack adds no value. Duck as a source of information is exhausted.



Sure, colleagues and friends can help you think. But their knowledge of your users is limited—just like yours. You'll stop being surprised by them too. To keep evolving your product, talk to people who actually need it. Pay attention to what surprises you—that marks the arrival of new, useful information.

# Surprise Should Be Within Reach

Talking to users should be as easy and accessible as grabbing a snack at a Google office. But usually, launching a qualitative study is a whole production. That effort barrier means research happens less often than it should. As a result, good ideas surface too late—or weak ideas move forward.

This playbook introduces a simple framework to make idea generation and development easier. It's built on:

- Familiar business situations: "Ah, this is one of those cases."
- Standard protocols: "In this case, I do X, Y, Z."
- **Substantive involvement:** The manager is a key part of the research, but their effort goes into thinking, not organizing

# **Framework**

Below is a simple guide for choosing the right exploratory research approach. Use it when you're facing one of the two business situations:

- A) you need to come up with something new, or
- B) things are unclear and you need to figure out what's going on.

# **01. Identify Your Business Situation**

Start by identifying the situation you're in. It might feel like there are endless variations and each one is unique—but in reality, most cases fall into just a few core types.

The object of study is a person (user/customer), the subject of study is his/her needs, perceptions and behaviour. Let's look at how these can be studied in different business cases.

All exploratory research tasks immediately fall into two categories:

- **Ideation** understanding people in order to come up with something (a product, strategy, or communication).
- Refinement testing understanding people's reactions to your ideas (product, strategy, communication) in order to develop them (shape them, make them concrete, express them clearly

# | Ideation

Understanding people in order to come up with something

#### **Business situations:**

- Assessing the potential of a new market and defining a market entry strategy
- Identifying growth opportunities for an existing product in the current market
- Finding niches or ideas for new products and conceptualizing those products
- Understanding issues with a current product and exploring possible solutions
- Generating new creative and communication ideas

#### **Expected research outcomes**

- Descriptive insights about "how things are"
- Conclusions about the potential of a market or direction
- Hypotheses about growth opportunities based on analysis of how the current product and its marketing are perceived, including drivers, barriers, unmet needs, and competitors

Insights for generating creative and communication ideas.

# Refinement Testing

Understanding people's reactions to your ideas

#### Business situation:

 You have a raw idea (for a product, feature, or communication). You need to develop it, make it more concrete, and articulate it clearly.

## **Expected research outcomes**

- Conclusion about the potential of the idea
- Areas for improvement

# 02. Choose the Subject of Your Research

Once you've chosen your column, you need to decide what exactly you want to talk to people about.

In the case of **Refinement Testing**, it's straightforward. Choose based on the material you need to test.

In **Ideation**, there are more options. The specific research topic depends on your product's lifecycle stage and which part of the product you can influence (what kind of ideas you are looking for). The most frequent options and basic guidelines are shown below.



Understanding people to come up with something

## Subject of Research

# A. How people are currently satisfying the need you're interested in.

This should be explored in almost any situation where you're looking for growth opportunities. Especially before launching a new product or entering a new market, but not exclusively.

This can be done by talking with people about:

- Category usage & perception
- Brand usage & perception (all brands)
- Customer journey
- Lifestyle & values

# B. How people use and evaluate your current product, brand, and communication.

This should always be studied when you already have a product in use.

This can be done by talking with people about:

- Customer experience feedback
- Churn analysis
- Brand audit (your brand)

# C. How people perceive and relate to a certain external phenomenon.

This should be studied when you need to analyze a phenomenon in terms of its potential opportunities or threats to your business.

This can be done by talking with people about:

• Concept (phenomena) comprehension & attitude.

# Refinement Testing

Understanding people's reactions to your ideas

#### Subject of Research

#### How people understand and perceive your idea or concept.

This can be done by presenting relevant stimuli and talking about it to your target audience:

- Insight test
- Product idea test
- Product design test
- Pack test
- Creative test
- Landing page test
- Advertising idea test
- Product placement feedback

#### 03. Draft Your Research Guide

Use the templates at the end of this playbook. Depending on your goal, you can combine questions from different templates.

Be mindful of interview length. For in-person interviews, you can go longer (up to 60 minutes). For automated ones, keep it shorter (around 15 minutes).

In any case, it's a good idea to stay focused and talk only about what really matters. This improves both the quality of the insights you get from respondents and the clarity of your analysis—ultimately leading to better decisions.

# 04. Define and Talk to Your Audience

Now that everything is ready, it's time to talk to people. But first, define exactly who you'll be talking to. You should speak with the target audience of your product—either potential or current users.

The target audience includes everyone who could theoretically need your product and who is physically able to use it.

Describe your target audience using this template:

- Demographics
- Geography
- Likelihood of having the relevant need

Demographics are important for recruiting respondents and often heavily influence preferences.

Geography defines your target market. If you work across multiple countries, always research each country separately—market conditions vary significantly.

Likelihood of need helps filter for people who actually might use your product. For example, if you're making diapers, you probably don't want to interview people without kids of the right age.

#### **EXAMPLE**

You're building a recipe app that suggests meals based on what's left in the fridge. Your market is Grenada. Your audience might be:

- Men and women aged 20–50
- Located in Grenada
- Have cooked at home in the past month

If you're planning to speak with current customers you already have access to, you usually don't need to narrow down the audience further. But you might want to select specific segments—like lapsed users—to understand why they stopped using your product.

This playbook doesn't cover how to recruit participants. It also doesn't limit your choice of interview format. You can do in-person or remote interviews, message-based conversations, community discussions, or even traditional focus groups. The core approach remains the same.

You can recruit participants via our trusted panel providers when you create a project on <u>vasna.ai</u>



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The easiest way to conduct in-depth interviews

# **Full List of Guide Templates**

#### Guide Templates for Ideation:

Category Usage & Perception

**Brand Usage & Perception** 

Concept (phenomena) Comprehension & Attitude

<u>Customer Experience Feedback</u>

#### Guide Templates for Refinement Testing:

<u>Insight</u>

Product Idea

Product Design

Pack

**Landing Page** 

Advertising Idea

Product Placement Feedback

# **Guide Templates for Ideation**

## **Category Usage & Perception**

Explore current category usage to identify unmet needs and get ideas for potential improvement or innovation.

#### **Category Examples**

Cat food, coffee machine, dishwasher tablets, hair spray...
Vacation planning app, meditation practices, home cleaning services...

#### Research Objectives

- Involvement and importance of the category
- Level of satisfaction
- Typical occasions
- Drivers (what drives usage)
- Unmet needs (opportunities)

#### <u>Guide</u>

#### **Involvement**

What first comes to your mind when you think about INSERT CATEGORY — what words, associations? When you think about this category, how does it make you feel?

How often do you use INSERT CATEGORY?

In general, how important is INSERT CATEGORY for you? {Use a scale from 1 to 5, where 5 means "Highly important"} Imagine INSERT CATEGORY won't exist anymore, how would it make you feel? Why so?

#### Satisfaction

Overall, are you happy with the choice and quality of the products in INSERT CATEGORY? {Use a scale from 1 to 5, where 5 means "Fully satisfied"}

If not (answers 1, 2, 3): Why are you partly satisfied, what are the reasons for that?

#### **Typical Occasions**

Describe the most typical occasion when you use INSERT A CATEGORY — where are you, with whom, what is your mood, why do you need this product/service in this particular moment? Are there any other occasions when you use this product? Please give an example of at least another occasion.

#### **Drivers**

Why do you use INSERT CATEGORY, what benefits does it give you? Probe on both rational and emotional motives of the category usage.

#### **Unmet Needs**

Is there anything that you lack in this INSERT CATEGORY? What would you add or improve?

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#### **Brand Usage & Perception**

Explore consumer preferences and motivations for using different brands in a category to get ideas for potential improvement or innovation.

#### Category Examples

Cat food, coffee machine, dishwasher tablets, hair spray...
Vacation planning app, meditation practices, home cleaning services...

#### Research Objectives

- Repertoire of the brands used, most often used brand
- Rational choice criteria of the most often used brand (benefits)
- Emotional choice criteria of the most often used brand (image attributes)
- Motives and occasions of other brands usage (if applicable)

#### <u>Guide</u>

#### Repertoire of the brands used

What brands of INSERT A CATEGORY do you use? What brand do you use most often?

#### Benefits of the most often used brand

Speaking about your most often used brand, why did you choose it — what are the main benefits for you? Ask them to name at least 3 benefits.

#### Image attributes of the most often used brand

When you think about this brand, what associations, images, emotions come to your mind? How would you describe this brand with 3 adjectives?

#### Motives and occasions of other brands usage

What other brands of INSERT A CATEGORY do you use from time to time? For each of the brands mentioned, ask what are the reasons and the occasion when they buy this brand instead of their most often used one.

#### **Areas of Improvement**

Is there anything you don't like about the brand that you use most often? What would you improve in this brand so it becomes your only choice?

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# **Concept (phenomena) Comprehension & Attitude**

Assess consumer awareness and understanding of concepts to gauge relevance and potential for positive reception or improvement.

#### **Examples**

Healthy hair, upcycling, body positivity, pet insurance, cozy atmosphere in a restaurant, mental health...

#### Research Objectives

- Awareness and comprehension
- Daily usage and synonyms
- Evaluation

#### <u>Guide</u>

#### **Awareness and Comprehension**

Have you ever heard the word/phrase INSERT CONCEPT? Please answer yes or no.

How would you explain INSERT CONCEPT in your own words (what does this mean)?

#### **Daily Usage and the Synonyms**

Do you use this word/phrase INSERT CONCEPT in your daily conversations?

If yes: In the context of which products, services, or brands do you use it?

If not: Why not?

What alternative or synonym would you prefer to describe the same concept?

#### **Relevance and Importance**

How relevant and important is this word/phrase to you — do you have similar thoughts? {Use a scale of 1 to 5, where 5 means "Highly relevant and important"}

If yes (answers 4, 5): What exactly makes this word/phrase relevant and important for you? How does it make you feel?

If not (answers 1, 2, 3): Is there anything in this word/phrase that resonates with you?

What would you change to make it more relevant or important?

#### **Evaluation**

Do you like this word/phrase INSERT A CONCEPT? {Use a scale from 1 to 5, where 5 means "I like it a lot"}

If yes (answers 4, 5): What exactly do you like and why? If not (answers 1, 2, 3): What do you dislike and why?

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## **Customer Experience Feedback**

Get customer experience feedback after using a service — such as making a purchase in an online store, visiting a bank branch, or requesting help in a food delivery app. The goal is to understand how customers feel about their interaction and identify opportunities for improvement.

#### Research Objectives

Customer experience assessment:

- Level of satisfaction, likes and dislikes
- Areas for improvement

#### Guide

#### Level of Satisfaction

We'd like to understand how you felt about your recent experience with INSERT A SERVICE. Please be honest — your feedback is valuable.

Did you like your overall experience? {Use a scale from 1 to 5, where 5 means "I liked it a lot"}

If yes (answers 4, 5): What exactly do you like and why? If not (answers 1, 2, 3): What do you dislike and why?

## **Areas of Improvement**

What would you change or improve to make this experience better for you? Was there anything you expected but didn't get? What could be added or done differently to meet your expectations?

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# **Guide Templates for Refinement Testing**

# Insight

Test problem statements (also known as insights) within a specific category to understand if — and how exactly — they resonate with your target audience.

#### **Examples**

I want to transition my wardrobe to more sustainable options, but it's difficult to identify which brands are genuinely eco-friendly and worth the investment.

I want to maintain a consistent skincare routine but there are so many products out there. I'm overwhelmed and unsure which ones are right for my skin type.

I wish cleaning my home was quicker and more efficient, but I can never find products that truly work on different surfaces.

#### Research Objectives

Potential of the insight:

- Relevance
- Current problem solving approaches
- Satisfaction with existing solutions
- Unmet needs
- Areas of improvement

#### Guide

I would like to show you one statement and understand if it resonates with you or not — INSERT INSIGHT.

#### Relevance

How relevant is this to you — do you have similar thoughts? {Use a scale of 1 to 5, where 5 means "Highly relevant"} If yes (answers 4, 5): What exactly makes this statement relevant for you? How does it make you feel? If not (answers 1, 2, 3): Is there anything in this statement that resonates with you? What would you change to make it more relevant?

#### **Current Problem Solving Approaches**

What do you do to solve the problem described in this statement? Name all the solutions you use to solve this problem.

#### Satisfaction with existing solutions

Overall, are you happy with the solutions that you found so far to solve this issue? {Use a scale of 1 to 5, where 5 means "I am fully satisfied"}

If not (answers 1, 2, 3): Why are you partly satisfied, what are the reasons for that?

#### **Unmet Needs**

What could be an ideal solution to solve this problem — what could help you to solve this issue in the most efficient way?

#### **Areas for Improvement**

What would you change in this statement to make it more appealing and relevant to you?

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#### **Product Idea**

Test product or service ideas to assess their potential and identify directions for further development. The idea should be easy to grasp — described in a clear, benefit-driven way, similar to a short ad. You may also include images or videos.

#### **Examples**

Weekly delivery of pre-seasoned fruits and vegetables, ready to cook — for people who want to eat healthy without spending time on prep.

A facial foundation that adjusts to your skin tone in real time, removing the need to match or blend.

Smart sneakers that count your steps, monitor posture, and suggest stretching exercises after long walks.

#### Research Objectives

Idea potential:

- Initial emotional response
- Appeal
- Purchase intent
- Uniqueness
- Areas of improvement

#### Guide

We would like to discuss with you an idea for a new product/service — INSERT PRODUCT IDEA. This is not a final product, but just a concept. Please focus on the idea itself and give detailed and honest answers; your opinion is very important to us.

#### **Initial Emotional Response**

What are your first thoughts, ideas, feelings, when you hear about this idea?

#### **Appeal**

Do you like this idea or not? {Use a scale from 1 to 5, where 5 means "I like it a lot"}

If yes (answers 4, 5): What exactly do you like and why? If not (answers 1, 2, 3): What don't you like and why?

#### **Purchase intent**

Would you be interested in using or buying this product? {Use a scale from 1 to 5, where 5 means "Would definitely try"} If yes (answers 4, 5): When would you use it? What would it replace? If not (answers 1, 2, 3): Why not?

# Uniqueness

Is the idea unique?
If yes: What makes it unique?

# **Areas for Improvement**

What would you change in this idea to make it more appealing and relevant to you?

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# **Product Design**

Test early-stage product design concepts (functionality, interface, or physical form) to evaluate their usability and appeal.

# Research Objectives

Product design potential:

- Initial emotional response
- Appeal
- Usability and intuitiveness
- Uniqueness
- Purchase intent
- Areas for improvement

#### Guide

We'll show you an early design of a product (not the final version) and ask a few questions about it. Please give detailed and honest answers; your opinion is very important to us. INSERT PRODUCT DESIGN (IMAGE)

# **Initial Emotional Response**

What are your first thoughts or feelings when you see this design? What stands out?

# **Appeal**

Do you like the design overall? {Use a scale from 1 to 5, where 5 means "I like it a lot"}

If yes (answers 4, 5): What exactly do you like and why? If not (answers 1, 2, 3): What don't you like and why?

# **Usability**

Do you think this product would be easy to use? Why yes or why not?

# **Uniqueness**

Does this design look different from other products you've seen? {Use a scale from 1 to 5, where 5 means "Very unique"} If yes (answers 4, 5): What makes it unique?

#### **Purchase Intent**

Would you be interested in buying the product in such a design? {Use a scale from 1 to 5, where 5 means "Would definitely try"}

If yes (answers 4, 5): When would you use it? What would it replace?

If not (answers 1, 2, 3): Why not?

# **Areas for Improvement**

What would you change in this design to make it better for you personally?

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# **Pack**

Test consumer reactions to product packaging concepts to assess their potential and to identify direction for further development.

# Research Objectives

Pack design potential:

- Initial emotional response
- Appeal
- Uniqueness
- Purchase intent
- Expectations based on the packaging
- Areas for improvement

#### Guide

We would like to show you the packaging of INSERT A CATEGORY and ask you a few questions about it.
INSERT AN IMAGE OF THE PACK. Please look at this pack carefully and give detailed and honest answers — your opinion is very important to us.

# **Initial Emotional Response**

What thoughts, associations, and images come to your mind when you see this pack design? Ask them to give at least 3 associations.

# **Appeal**

Do you like this pack? {Use a scale from 1 to 5, where 5 means "I like it a lot"}

If yes (answers 4, 5): What do you like about it? Why? If not (answers 1, 2, 3): What do you dislike about it? Why?

# **Uniqueness**

Do you find this packaging unique? If so, what elements make it unique?

#### **Purchase Intent**

Would you be interested in buying the product in such a pack? {Use a scale from 1 to 5, where 5 means "Would definitely try"}

If yes (answers 4, 5): When would you use it? What would it replace?

If not (answers 1, 2, 3): Why not?

# **Expectations Based on the Packaging**

What would you expect from the product inside this pack? What characteristics should it have (expected quality, specific attributes)?

# **Areas for Improvement**

What would you change in this packaging to make it more appealing to you personally?

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# **Landing Page**

Test user reactions to a landing page of a product or service to assess its lead generation potential and to identify direction for further development.

# Research Objectives

Landing page potential:

- Initial emotional response
- Appeal
- Clarity
- Purchase intent
- Areas for improvement

#### Guide

We would like to show you a landing page INSERT LINK. Please visit the page and get back to me. I will ask you a few questions about it. Please provide detailed and honest answers — your opinion is very important to us.

# **Initial Emotional Response**

What thoughts, associations, and images come to your mind when you see this landing page? Ask them to give at least 3 associations.

# **Appeal**

Do you like this landing page? {Use a scale from 1 to 5, where 5 means "I like it a lot"}

If yes (answers 4, 5): What do you like about it? Why? If not (answers 1, 2, 3): What do you dislike about it? Why?

# **Clarity**

What do you think they offer or motivate you to do on this landing page? If not mentioned spontaneously, please specify which product/service and brand are offered.

#### **Purchase Intent**

Would you be interested in buying this product/service? {Use a scale from 1 to 5, where 5 means "Would definitely try"} If yes (answers 4, 5): When would you use it? What would it replace?

If not (answers 1, 2, 3): Why not?

## **Areas for Improvement**

What would you change in this landing page to make it more appealing to you personally?

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# **Advertising Idea**

Test advertising concepts (boardomatic, animatic, storyboard, video, etc.) to assess their potential and to identify direction for further development.

#### Research Objectives

Ad idea potential:

- Attention triggers
- Initial emotional response
- Clarity
- Appeal
- Uniqueness
- Credibility
- Purchase intent
- Areas for improvement

# <u>Guide</u>

We would like you to evaluate an advertising concept. This is NOT a finished ad, just an idea. Please focus on the concept itself rather than the quality of execution.

# **Attention Triggers**

Imagine that you want to tell a friend about this ad. What would you tell him or her? How would you describe the main

idea of this ad? What do you think the creators wanted to convey about the product and brand?

# **Initial Emotional Response**

What were your first thoughts, feelings, associations when you saw this idea?

# **Clarity**

Is this ad idea clear to you? {Use a scale of 1 to 5, where 5 means "Absolutely clear"}. If not absolutely clear (answer 5): What is not clear, what questions arise when you see this ad? Probe what else.

### **Appeal**

Do you like this ad idea in general? {Use a scale of 1 to 5, where 5 means "I like it a lot"}

If yes (answers 4, 5): What do you like about it? Why? If not (answers 1, 2, 3): What do you dislike about it? Why?

## **Uniqueness**

How unique is this ad idea? {Use a scale of 1 to 5, where 5 means "Very unique"}

If yes (answers 4, 5): What makes it unique?

# Credibility

Is it credible? {Use a scale of 1 to 5, where 5 means "Absolutely credible"}

If yes (answers 4, 5): What makes it credible? If not (answers 1, 2, 3): What makes it not credible, what confuses or repels you?

#### **Purchase Intent**

Would you be interested in buying this product/service? {Use a scale from 1 to 5, where 5 means "Would definitely try"} If yes (answers 4, 5): When would you use it? What would it replace?

If not (answers 1, 2, 3): Why not?

# **Areas for Improvement**

What changes would you suggest to make this advertising more appealing to you?

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# **Product Placement Feedback**

Gather customer feedback after real-life use of a physical product like shower gel, energy drinks, or a car. The goal is to assess long-term potential and spot areas for improvement.

# Research Objectives

Assessment of the experience with the product:

- Level of satisfaction, likes and dislikes
- Purchase intent
- Areas for improvement

#### <u>Guide</u>

#### **Level of Satisfaction**

We'd like to understand how your experience with INSERT A PRODUCT was. Please be honest — your feedback is valuable.

Did you like your overall experience? {Use a scale from 1 to 5, where 5 means "I liked it a lot"}

If yes (answers 4, 5): What exactly do you like and why? If not (answers 1, 2, 3): What do you dislike and why?

#### **Purchase Intent**

Would you be interested in buying this product? {Use a scale from 1 to 5, where 5 means "Would definitely try"} If yes (answers 4, 5): When would you use it? What would it replace? If not (answers 1, 2, 3): Why not?

# **Areas of Improvement**

What would you change or improve to make this product more appealing and relevant to you?

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