

Panelist Management

Recollective includes extensive panel management capabilities to onboard, screen, profile, segment and secure your panelists and their data



Custom Profile Fields

Panelists can be profiled via custom fields defined by site administrators. Supported field types include poll, plain-text, formatted text, date, time and video. Fields that may contain personally identifiable information can be flagged for inclusion in the removal of personal data at the end of a study.



Segmentation

Panelists can be grouped into segments manually and via custom rules based on standard attributes, custom fields and other metadata. Segments are functionally important and essential for profiling. They can automate study memberships, limit access to activities and focus communications. Segments can be @mentioned and they can be selected as email broadcast recipients.



Bulk Importing & Updating

The bulk importing and updating of panelist is streamlined through an advanced module that can process common Excel files. Each column in the spreadsheet can be assigned to a standard attribute, converted into a custom profile field or a new segment. All data is validated prior to the import to avoid format mismatches and duplicate accounts.



Invitations & Self-Registration

Panelists can also be directly recruited from any website or email list via a secure invitation link to the site or a specific study. Support is also provided for emailed invitations to self-register.



Screening & Balancing

Custom screening questions can be surfaced at both the site and study-level to qualify, profile, segment and balance the panelists as they are registered. Manual or automated approval flows are supported. Screening questions can be presented before or after account registration. Even video can be collected as part of the

screening process for advanced requirements. Applicants to a study can also be rejected automatically to satisfy balancing requirements (e.g. limit “Male” and “Age: 18-24” to 15% of the target study population).



Single Sign-On & Webhooks

Single sign-on (SSO) is supported for common consumer identity sources such as Google, Facebook and Twitter. A separate SSO protocol is also available for customers wishing to create a deeper integration with Recollective, one that can drive segmentation and assign values to custom profile fields. Webhooks allow panelist-driven events to trigger custom callbacks to external sites. Webhooks are customizable, fully logged and ideal for integration with external panel providers.



Unique Panelist Identifiers

Each panelist has up to four unique identifiers: Panelist ID (assigned by Recollective), an optional External ID (assigned during bulk import or SSO integration), an email address and a username.



Email Address Validation

Email addresses are validated in real-time when they are provided by panelists and verified with each email communication. Those with rejected emails are automatically encouraged to provide a new address upon their next visit. Panelists may also opt-out from additional email communications via an unsubscribe link included in all notices. Panelists that unsubscribe or have invalid emails are clearly identified in the platform.



Email Communications

Email broadcasts and notifications are dispatched from within a study. Site administrators are able to brand the emails including the sending email address. To maximize deliverability, Recollective provides a tool to help set up and verify the DNS entries required for email sender authentication (DKIM). The frequency of automated email notices can be customized, reduced to a daily digest or disabled entirely. All emails can be configured to include the name and address of the organization to comply with regional privacy requirements.



Privacy

Recollective assists its customers in following regional privacy regulations such as the GDPR and the CCPA. Multiple consent agreements can be presented, tracked and enforced. Agreements can be required or left optional and are used to track opt-out requests.



Personal Data Removal

As needed, or upon specific request from individuals, personally identifiable information (PII) of a panelist, or segment of panelists, can be removed without negatively impacting the research data collected. This includes the removal of panelist-provided photos and videos while maintaining annotations, audio-content and transcripts. Anonymous usage is also supported while still permitting the screening and tracking of applicants.



Language Support

Language support for the interface is currently at 24 languages and growing. UTF-8 and right-to-left character support ensures all languages are correctly displayed. All videos submitted by panelists are automatically transcribed and Recollective's speech-to-text conversion can handle 127 language and language variations.



Panelist Tracking

Metadata is tracked for each panelist to allow administrators to identify who is actively engaged in one or more studies. Study-level statistics are collected on invitations, registrations, activity completions, discussion posts, email opens, incentive points collected, and more.



Account Security

Account security is provided a number of ways such as enforcing password rules, mandating password changes, automating password expiry, limiting password re-use, supporting two-factor authentication, limiting session durations, locking on failed login attempts and more.