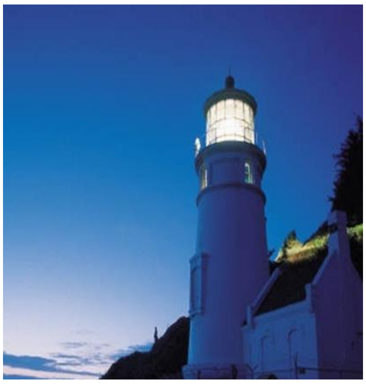
How to write a topic guide

The role of the discussion or topic guide

At the planning stage of the research, it is a practical framework that indicates what is to be excluded or included and reassures the client that the researcher will not leave anything out.
Sometimes the guide is passed round all interested parties and everyone throws something in. This is the skip theory of guide development.

Client guide



Researcher's guiding light

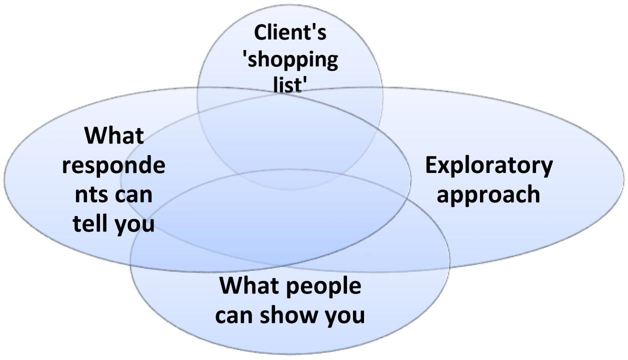
- A long and detailed guide is not practical to use in an interview. It is inflexible, draws focus away from the respondent, and interferes with building the research relationship.
- What the researcher needs is closer to a 'guiding light'. An overall direction, key steps along the way, but flexibility in question construction, order and timing.

If you have to adapt an overlong guide, chunk it into topics, rewrite it into bullet points, and use lists of probes rather than full questions. **Check with the client as to what is essential and what is nice to know.** Explain you need some flexibility in order to manage the research relationship and explore new ideas. The process of rewriting will help you internalise it.

How to write a guide

Go back to the research objectives, your hypotheses and theories. Clients sometimes treat the guide as a shopping list – "we want to know X, Y and Z about how people buy coffee." But its more useful to think of it as a **guide to a journey –** into the land of coffee usage. This will give you creativity, flow and open-ness to new discoveries.

You can start with the shopping list of questions. But if you don't reframe these you will end up asking direct questions, as in the quantitative model – which will make for a poor, and short, qualitative interview. Think about what respondents can and can't tell you, - and other ways of eliciting that information.



1. **Take an exploratory approach.** Instead of asking "what are your attitudes to paying tax?" (Which will give you a socially acceptable answer) get participants to talk about closely allied subjects, such as their interactions with the tax office, how they feel when looking at their payslip and so on.

2. **Step into participants' shoes**. What can you reasonably expect them to remember or describe? How much self-insight might they have? When may you have to get them to stop and focus, use a technique to elicit more detail, show them some stimulus material for further exploration?

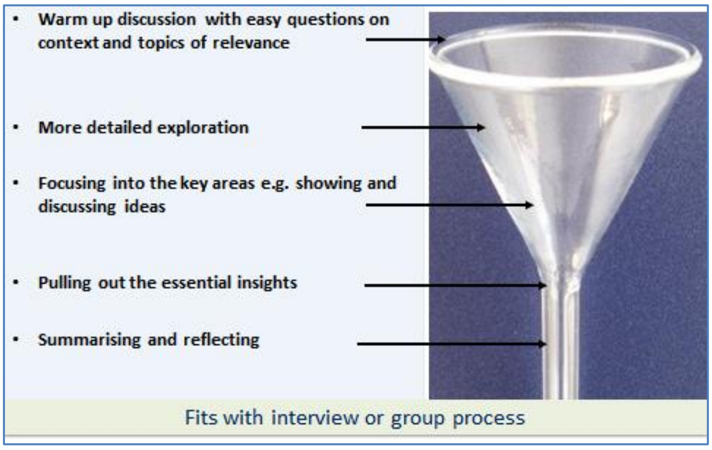
3. Remember that qualitative research can **access things people didn't know they knew** – or felt. Include visual exercises and projective techniques – and allow enough time to explore the new information they generate.

4. If it's important to assess spontaneous reactions to something, make sure they will not be contaminated by anything said earlier. Watch out for order effects, and bear in mind the different stages of an interview.

5. Use open questions, list the prompts for the topics you want cover, leave space and time to explore emergent information. Make it usable, so you don't have to spend the whole interview referring to detailed questions. It's a GUIDE, not a questionnaire.

The structure of a guide

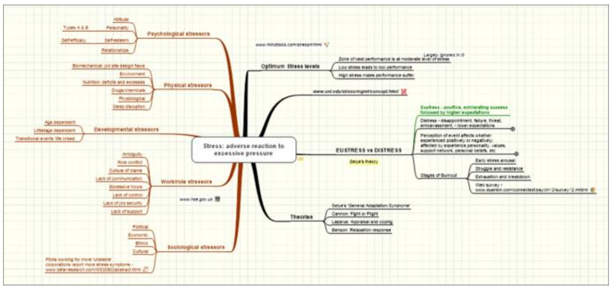
The most common structure is like a funnel



- The introduction helps to reassure the respondent and set the boundaries of the interview.
- The warm up consists of easy questions designed to build the respondent's confidence and engage their interest.

- Then there can be an exploratory stage where relevant themes and ideas are examined
- The guide starts to focus into the key subject areas. By this time the relationship should be one of empathy and trust, leading to easy disclosure.
- Once discussion of the key subjects is finished there should be a period of reflection and summarising, and a good close to the interview.

Note that in other cases guides can be structured to follow a longitudinal process or as a mind map.



How to come up with topics for the guide

- Operationalise hypotheses and theories
- Define ‘fat words’
- Ensure you have context
- Do you need to cover the rational, emotional, social and cultural?
- Brainstorm what else is relevant
- Step into client’s shoes
- Step into participants’ shoes

Operationalising turns big ideas or vague concepts in questions that can be understood and answered.

Example: You are researching employees who are striking because they disagree with management over working practices. You have a theory that collective narcissism is increasing sensitivity to perceived slights, and blocking negotiations. You cannot ask “are you influenced by collective narcissism?” You have to break down the concept into elements that can be probed and discussed such as:
Feelings that the workers deserve special treatment and respect, they could run the company better than the management, etc. These can become questions or discussion topics.

Check the brief for ‘fat’ words, that might be interpreted differently by different people. What do they mean by ‘progress’ or ‘success’? How can you tell if someone is ‘engaged’ with a communication or not?

Make sure you have enough background information to understand people’s motives for saying things. What are the relevant influences?

Remember that qualitative research can cover the rational, emotional, interpersonal/social and cultural and make sure you have questions from the relevant domains. For example, a common objective is to discover ‘attitudes’. They can come from:

- Cultural rules and traditions
- Social groups we belong to or aspire to
- Biological and psychological needs

Ask other people – you will get different points of view.

Topic guide Checklist

- Will it fully meet the objectives?
- Does it examine all relevant angles?
- Does your introduction address any concerns the respondent might have?

- What kind of mood do you want to aim for, and how will you create it?
- Is it in appropriate language?
- Is it realistic in terms of what respondents will know or be able to remember? Have you techniques to help with this?
- Does it get spontaneous awareness early (if required)?
- Have you got all the context required for understanding?
- What topics might be considered private and how can you encourage disclosure?
- Does it allow for the build-up of a trusting relationship before exploring the key issues?
- Have you included enough time for stimulus and/or techniques?
- Does it follow a flow? Change energy to keep engagement? Or are parts repetitive and boring?
- Might there be order effects or education effects - where discussing something early on changes vital attitudes later
- Does it spend enough time on the priorities?

Always try a guide on for size. Ideally run through with a colleague who is not part of the project – or at the very least, put yourself in the respondent's shoes.