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The role of the discussion or topic guide

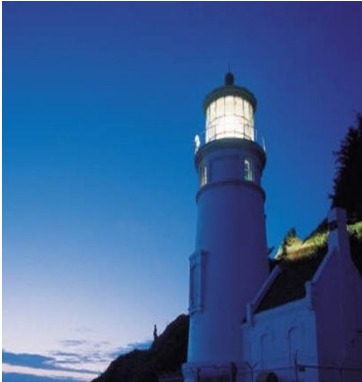
At the planning stage of the research, it is a practical framework that indicates what is to be excluded or included..

- It’s a forum for the formulation and exploration of hypotheses.
- It demonstrates to the client that the interviewer has understood all the issues and will not leave anything out. (So it can become overlong and detailed.)

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 to manage the research relationship and explore new ideas. The process of rewriting will help you internalise it.

How to write a guide

STEP 1 Brainstorm what should be included

If you haven’t already done so, go back to the research objectives, your hypotheses and theories.

Clients sometimes treat the guide as a shopping list – “We are launching recyclable coffee pods, so we want to know what people think of the idea, the price, the packaging. Oh and what channels are best to use for marketing. And.....”

Clients are using rational System 1 thinking because that is how they work. But consumers are influenced by many factors, some of them emotional, some social, some not in their conscious awareness. Your guide will be richer if you think about these in advance.

- Do some background research
- Ask the client for more information about the business initiative
- Check the internet, social media
- Wonder what emotional, social, and cultural approaches might bring in terms of understanding

Take an exploratory approach. Instead of asking directly “how likely are you to buy recyclable coffee pods?” get information so that you can assess their attitudes and likely behaviour.

Some of the things you would consider are:

- What is the relevant behaviour and what drives it?
- Is it rational, emotional, social, or cultural?
- How habitual is it? How could it be changed?
- What is the context for the behaviour?
- What conscious and unconscious cues might affect it?
- What cognitive biases might be in operation?
- What is the competitive context? What alternatives are there?
- What are the needs and ambitions, personal and social?
- What are their fears and anxieties – what pushes them away?
- What are their beliefs and understanding about the product area, the organisation / product / service? What are these founded on? What is accurate and what is hearsay or myth? Where does this information come from?
- What sources of information do people have?
- How trustworthy or influential are they? In what ways?
- How does your offer map out in terms of rewards/gains versus effort/ drawbacks/ potential losses? This would include pricing and value for money, if relevant.
- What in your offer are people drawn to and why? What are the emotional benefits or consequences of what you are proposing?
- How much do they believe what you are saying?
- How do you best communicate with them – what channels, what strategies? How do you best engage?
- What are the longer-term implications for the organisation or brand?

Importantly, you will need to prioritise the questions and approaches that will be most helpful in reaching your objectives. Ask: “what will the client be able to do differently with this knowledge?”

Have a list of **Need to know**, and then a list of **Nice to Know**, to be included if there is

STEP 2 Imagine the group or interview from the participant's view

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?



Design to avoid boredom

1. 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. **Include some exercises that will engage people (e.g. mapping) even if they are not strictly necessary.**
2. If it's important to assess spontaneous reactions to something, make sure they will not be contaminated by anything said earlier.
3. Make sure you have good stimulus material for presenting or exploring any new ideas. Check how well it communicates. Otherwise you will waste time trying to explain what it was supposed to show.



Pre-tasks to stimulate respondents into thinking about the subject



Packs, products, brochures, advertising, photographs – existing material



Exploratory material to talk around broad concepts, positionings, ideas, etc



Material that shows or describes products, ads or services that do not yet exist

STEP 3 Write open questions, prompts and probes

Use open questions, list the prompts for the topics you want cover, leave space and time to explore emergent information.

FOR EXAMPLE

Attitudes to recycling -(focus on kitchen waste)

Recycling behaviour:

How consistent is it?

What makes it easier or harder to recycle?

Motivations for recycling -Probe

- Feeling good (virtuous)
- Environment
- Social expectation

Make sure your guide has a good flow from one topic to another and fits within the time allocated. This has to be a guess initially. Most guides get revised after the first few interviews or groups when its evident what is more or less important.

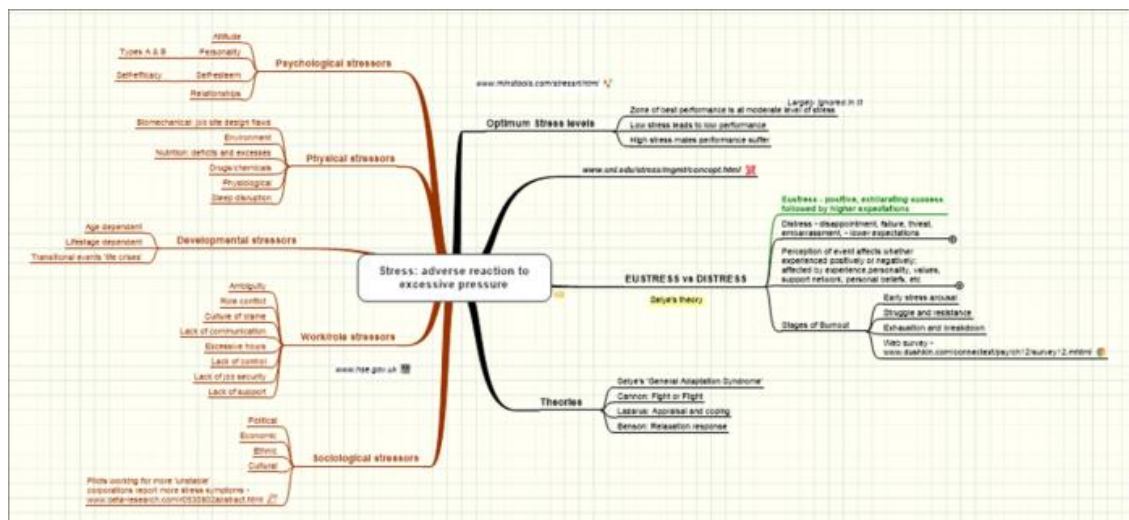
The structure of a guide

The most common structure is like a funnel. It goes from broad, easy topics to a narrower focus. Start with the interviewer's or moderators' introduction, that sets up the boundaries and 'rules' of the research.



- The introduction helps to reassure the respondent/s.
- The warmup 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. **This is the key time to introduce most projective techniques or explore the critical research issue.**
- If you need to vary the order in which stimulus material is presented, work it out before you start the research.
- 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. An example of a guide in tabular format can be seen at the end of the document.



How to write the researcher's introduction

This needs to be welcoming, friendly, and professional at the same time. Some of the information you must give is required by Data Protection legislation. And it is a good idea to follow the MRS or ESOMAR [Code of Conduct](#). Add whatever you need for your own circumstances.

Write it as a set of bullet points. When you deliver it you may need to stop every now and again to check everyone is following you.

Above all, make the respondent feel valued and important.

Psychology of a good introduction	What you actually say
Sound friendly, warm and competent	<i>Welcome and thanks</i>
Respondents feel more comfortable as they know more about the situation	<i>Introduce yourself, company, explain purpose of research</i>
Its OK to criticise, you won't hurt feelings	<i>Independent</i>
Feel protected, empowered	<i>Code of Conduct, anonymity, right to withdraw</i>
Your information is very valuable	<i>Reason for recording or viewing</i>
Set expectations of freer interaction	<i>'Chatting' (informal), doing exercises</i>
Its not a test, researcher is non-judgmental	<i>No right or wrong answers</i>
Not groupthink or the company message	<i>Your own personal views matter</i>
You can relax. The researcher is expert in process management	<i>Interviewer's job is to ask questions, manage the time, move on if necessary</i>
Set an appropriate tone for the subject	<i>Be serious / be creative / be collaborative – model whatever you need</i>
Change norms of conversation	<i>Model the language to be used</i>
We will look after all your needs	<i>Housekeeping issues, refreshments, etc.</i>

How to design the respondent's warm up

- You need to get people talking straight away
- Ask each person to say no more than three things about themselves, one of which should be their name
- Ask easy questions about behaviour, don't make it a challenge. Some icebreakers work well but others make people cringe, so consider your audience.
- To get people talking in sentences rather than one-word replies, use "tell me about...."
- Use the opportunity to get some context about the subject matter. You will later find it helps to understand why people say what they do.
- You can use pre-tasks – asking people to identify a relevant object or app, for example, that they talk about at the start.
- **For in person groups, you can do a paired introduction.** Participants interview each other in pairs and present the other person to the rest of the group.

How does the guide help manage people?

If you have a good introduction, warm up, and you have done Step 2, you will be able to:

- Explain the purpose of the research and the roles of researcher and participant
- Reassure people its not a test, make them feel valuable
- Make them feel safe and willing to disclose freely
- Make the process interesting for them with a variety of tasks and questions
- Give yourself the power to manage the time and manage contributions (if anyone is talking too much)
- Reassure people that you will finish on time.

A good close is also important. Leave time for some reflection at the end of the group.

Indicate you are coming to the end of the session.

Ask people to summarise what they found most interesting/ relevant?

OR you summarise and check if its accurate.

OR ask what key message you should take back to the organisation you are working for

AND Finish by asking "Is there anything you want to say that you have not had a chance to say?"

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 it through with a colleague who is not part of the project – or at the very least, put yourself in the respondent's shoes. Understand what you could answer easily and what might prove challenging.

Even with the best planning, you may need to change it after the first few groups or interviews as you cannot anticipate everything in advance.

EXAMPLE TOPIC GUIDES *Saturday/Sunday Times Readers Topic Guide*

The objective of the research was to assess interest in potential TV advertised compilation albums. One idea was to brand and link the albums to the Sunday Times Play Supplement (then available on a Saturday) or the Culture Supplement (Sunday).

This guide has been edited to remove confidential information.

Respondent's introduction:

Using the placement questionnaire, describe their taste in music

How do they find out about new releases and make up their minds to purchase – give example of a recently bought album.

Role of press vs TV/radio in informing purchase

Role of general press vs specialist music press

Papers/Imagery

Using mastheads of the main papers, check readership – how started, how long for, favourite sections of the weekend paper.

How are papers and the experience of reading them different on weekdays, Saturday, and Sunday? If they could not read the paper for a month, what would be missing from their lives?

For SAT/ SUN TIMES readers – how are these papers different from the others?

- Word Association - everyone writes down on Post Its as many words as they can think of that they associate with STimes
- Personification: If the paper became a person and walked into the room, who would they see? What characteristics would this person have? What kind of music would she/he like?
- Design a 'visitor centre' to recreate the experience of the Sat/Sun Times
- Collage: Intuitively pull out pictures that they associate with the S/S Times and describe

Summary – brand footprint

Which values are central and unique – which are part of the brand but are shared with other papers?

PLAY/CULTURE Show recent copies

What are the most valuable parts of these? To what extent do they read/note the music reviews? Have they ever bought on the recommendation? What do they think of the people who write the reviews?

PLAY/CULTURE link with music

SHOW BOARD WITH 'REMOVABLE' ARTISTES

Build up a profile of the artistes they would associate with Sunday Times/Play and Culture
What about **older acts** like George Michael, Sade, Eurythmics, Lenny Kravitz, Sinéad O'Connor, Lisa Stansfield, Wet Wet Wet etc?
Are there **sub-groups** of acts?

IF Play/Culture were to release albums, what would they expect to be on them and who would they be aimed at?

Idea of **Critic's choice** – if the reviewers were to choose the tracks, - how would respondents feel about the result?

(ROTATE PLAY AND CULTURE SEGMENTS)

Play Concepts

SHOW PLAY SERIES BOARDS & INDICATE NEW MUSIC AND CLASSICAL CHILLOUT COLLECTION

Is this the type of music they would expect from Play?
What would personally interest or not interest them?

SHOW NEW MUSIC TRACKLIST

Discuss to whom it would appeal and why?
Interest in purchase

SHOW CLASSICAL CHILLOUT COLLECTION TRACKLIST

Discuss to whom it would appeal and why?
Interest in purchase

SHOW DESIGNS FOR BRANDING

Overall fit with brand
Comparison of designs, preferences, reasons, principles of sub/branding

LOOK at other CDs to choose appropriate styles of packaging

Alternative Format for a topic guide to follow and explore topics as the respondent raises them (Topic Private Medical Insurance vs NHS)

	Getting PMI	Past dealings with Private hospitals	First awareness of illness/condition treated on NHS	Planning \ organising treatment	NHS Treatment & recovery	Post-treatment attitudes
Awareness/ knowledge	Briefly – who PMI is with, when and why got it, how feel about having it – what makes you want to have it?	Top of mind awareness of private hospitals/groups	When? Who? How? What?	Key players/factors in the decision Tests, scans etc	Key staff and attitudes to them	Changes you would make if you could re-write the past; if any?
Influences		How find out which are good? Which are trusted influencers/advisers?	Did you blame anything /anyone for it?	Sources of information? Personal vs. media? Consistency of advice?	What was expected or unexpected? Big and little things you noted? Who or what made things happen?	Role of media in influencing? What would you do differently in future?
Decision-making		Which used in the past and why?	Why started to consider NHS?	What clinched the decision to go NHS?		
Emotions /motivations		List what is of value in private care. Ladder up briefly – and why is that important to you?	If I was inside your brain that day, how would I feel?	Any doubts about the decision or the treatment?	What emotions did you experience and what triggered them?	If you became ill again, God forbid, what exactly would you look for in the care you received?
Survival needs/ belongingness Power/influence Competence/control Understanding Aesthetics			What is of value in the NHS? List and ladder up briefly – why is that important to you?	Who or what were you most concerned about pre-treatment?	How safe /cared for /in control did you feel and why?	And why is that important to you?
Images, aspirations, similes/ metaphors		What comes to mind about private? Associations, images, users, feelings etc? Are you a PMI person? What is it similar to – book, film, person, experience?	What comes to mind about NHS? Paint me a picture of the NHS as you saw it then. What is it similar to – book, film, person, experience?	What outcome were you hoping for?	At what other times have you felt similar to the way you felt during treatment?	What would you most want to see, hear, and feel when considering your care? Think of another time when you have experienced something similar?
Social context / group norms, influences		What are other people thinking or feeling about you using private care?	Compare private care and NHS – what other relationships are they like?	What did people say when they found out you were going NHS?		What would you say to family and friends about the decision?
Cultural norms		How does society in general currently judge private care?		How would the newspapers have reported your case?		What are the trends in society about PMI-NHS?