Tips for Creating a Discussion Guide

A discussion guide helps you prepare for spending time with a person whose experience you wish to better understand. The goal is to create a framework for the participant to share openly with rich detail.

1. THE GROUNDWORK - Get these all out on sticky notes

- Consider your project's topic – who is involved in activities related to it and what are those activities?
- Whose experience and associated activities would you like to learn more about?
- What specific interactions – among people or between people and specific tools/objects – are you curious about?
- These activities, topics and questions form a backdrop for your inquiry.

2. SHOW RESPECT AND GAIN TRUST

- Thank the participant(s), reinforce that it is their expertise and experience you seek to learn from, confirm the time and address any questions they have.
- Confirm it is OK to record video and/or audio for internal purposes only.
- Throughout the interview acknowledge and thank them for their helpfulness and insights and that you are learning a lot about how things really work.

3. START WITH A GRAND TOUR

- Begin with a broad open-ended question that covers the overall experience you are trying to learn more about.
- Use, "Take me through ..." as an easy way to start. i.e. "Take me through how you serve your clients from when they stop in through completing the program."
- This allows the participant to touch on a broad range of activities and sets the stage for your further inquiry.

4. THEN EXPLORE SPECIFICS

- Now ask them for more detail in a particular area they covered that is especially relevant to your project.
- Occasionally, refer to your list of activities, topics, questions you wrote down in planning for the interview to confirm you are getting good info to answer them.

5. WRAP IT UP

- Make sure to respect the time or your participant and close on time or before.
- Look to ask a blue sky question at the end. "If there were no barriers to a new way of doing this, how should it work?"
- Thank them for their time and ask permission to follow up.