NSW Digital Service Toolkit - Activities and templates

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|  | Discussion guides  Use the template to create a discussion guide for use in research interviews. |

## Document snapshot

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| --- | --- | --- | --- | --- | --- | --- |
| **Use for**: Structuring your research interview | | | | | | |
| **When**: Ahead of research sessions | | | | | | |
| **With**: User research lead | | | | | | |
|  | Time  **30 mins +** |  | Casting **1+ team members** |  | Tools **Word** |
|  | The time you need depends on whether you’re building from previous research planning or creating a standalone discussion guide. |  | Creating your discussion guide is a 1-person job but it’s a good idea for the user researcher (if that’s not you) or someone else in the team to review it. |  | This template is in Word, you can transfer this to another tool if you’d prefer. |

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## Document guide

Running a user interview is much easier with a discussion guide to refer to. They provide the interviewer with a reminder of the key questions, and a structure to make sure nothing is missed during the interview.

This template will help save time drafting a discussion guide specific to your team and project. It provides a suggested format that covers the basics of running a user interview.

|  |  |  |
| --- | --- | --- |
| **What’s it for** | **What you’ll get** | **When to do it** |
| Efficiently producing a structured discussion guide for research interviews (instead of starting from scratch). | A simple discussion guide template you can adapt and re-use for all your research interviews. | This template can help you prepare before your research sessions. |

## How it works

### Before you start

* decide on your research questions or identify your objective in running research interview sessions
* have your list of key research questions and assumptions
* set a time limit for each session that your interview needs to stay within (Generally between 30 and 90 minutes).

**Step 1***:* List out and order the main topics of your interview

Group your questions by topics or themes that will make sense to your interview participants.

List them out in a logical order, ideally one that will make the interview flow.

**Step 2:** Insert your questions for each topic

For each topic:

* Start with a question to introduce or open the discussion about the topic
* Add a note to the facilitator which explains the intent of the question
* Add and follow-up / more specific questions you might ask to learn more
* Following the same structure, add the rest of the questions for the topic

Repeat the above for each topic.

**Step 3:** Write instructions for any user activities.

Explain and activities / tasks / usability tests that will form part of the research session. Make sure to add the links and any notes to the facilitator.

**Step 4:** Write questions that invite reflection

Reflective questions invite participants to reflect on the broad range of things covered in the interview and provide more considered answers.

**Step 5:** Test your discussion guide with a colleague.

This will help you to work out if any questions aren’t clear. You’ll also be able to re-order your questions if the interview doesn’t flow well.

**Step 6:** Write a brief introduction script for the interview to give your participants a clear understanding of:

* the purpose of the interview
* how their information will be collected
* how you will be recording and using what they tell you in the interview.

**Tip:** Once you’veadded your intro text, save a copy of the document which removes the instructions and tips from this document to leave just the intro script and discussion questions you’ve added to the template. This will make the document simpler to follow in your interview sessions.

### Timing

Allocate a timing for each section in your Discussion guide. Work backwards from the time you’ve allocated for the session and ensure you can allocate enough time to your most important questions or activities.

### What’s next?

Once your discussion guide is ready:

* Run your interviews
* Check in with your team after the first 1-2 interviews and fix any critical issues you’ve noticed in your discussion guide.

## Additional resources

[Example discussion guide (Word)](https://digital.nsw.gov.au/sites/default/files/Discussion-guide-document-example.docx)

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## ▐ Introduction script

|  |  |
| --- | --- |
| **Overview** |  |
| Purpose | Starting the research session with a written script means you cover important points like confirming participants consent and informing them of their right to end the interview if they need to.  The written script also ensures that you provide context about who is in the interview, where you work and why you are asking them questions. |

### Section 1: Introducing the session

**Time**: 5 minutes

### Our purpose

We are part of a team at NSW Government working to **[Insert purpose of agency / team].**

We are conducting some research because **[insert high-level objective of research].**

### Introducing yourself

I work for a team at NSW Government called **[insert name of team].**

The **[Insert agency name]** wants to **[Insert mission of agency / team as it relates to interview participant].**

### Introducing other people on the call

**[introduce other people by their first names]**

Our facilitator will be asking questions, keeping time.

Our note-taker will be taking notes.

Our technical support will be assisting with online tools.

### Introducing the session

This session will take **[insert length of time]** and we have lot to get through, so we may have to move the discussion forward at certain points.

We will be recording this session / we will be taking notes during the session.

All responses are confidential.

When we report the insights from this session, we remove all names any personally identifiable information from the insights.

There are no right or wrong answers,

* We just want to hear your personal opinions
* We are testing the concepts, not you
* If you have trouble using anything at any point, then that is our fault, not your fault
* Be as open as you want, as you go through these concepts
* We want you to tell us what you’re interpreting in your own words.
* So, say what’s on your mind.

If you feel uncomfortable answering any questions you don’t have to answer them. Or if you feel uncomfortable continuing the research at any stage you can stop the session.

### Introduction to the topic

**[This is an example for COVID-19, please adjust according to your topic]**

We’re going to speak with you today and go through a couple of activities to better understand your experience looking for information about COVID-19 on the NSW government website.

### Starting the session

I can see that you have already signed the consent form, thank you for that.

[If not, can you sign it now before recording starts]

As I mentioned earlier, we’ll be recording the session. We will start recording now.

We’ll also be sharing our screen so you can access our concepts and tools. We’ll explain this process in more detail when we get to this stage.

### Questions

Have any questions? If you have any questions during the activity let us know.  
Do you have any questions so far?

## ▐ Discussion guide

|  |  |
| --- | --- |
| **Overview** |  |
| Purpose | Following a discussion guide will ensure your research participants have a consistent experience. It also helps the research stay on track during the interview. |

### Section 2: Background questions

**Time**: 8 minutes

Stimulus: none

#### General questions to get the conversation started

**[Tailor these questions for relevance to your discussion]**

Firstly, tell me about yourself.

Have you interacted with NSW Government lately?

If yes, what?

For what reason?

How was that experience for you?

**\*\*\*For each research topic, copy this section and fill out the key parts below\*\*\***

Question Section #: **[Topic]**

**Time**: **[XX]** minutes

**\*For each question, copy this section\***

Question: **[Insert question]**

Intent of question: **[Record why you’ve included this question in the interview, so the interviewer can refer to it as they are facilitating]**

Follow-up questions: **[Insert questions]**

**\*\*\*For each activity, copy this section and fill out the key parts below\*\*\***

### Activity Section #: [Activity name]

### Time: [XX] minutes

Stimulus: **[Add URL]**

#### Introduction to activity

**[Insert instructions for activity]**

#### Notes

**[Insert notes here]**

### Section 3: Reflective questions

**Time**: **[XX]** minutes

We’re coming to the end of the interview now, and I just want to take a moment to reflect on the things we’ve discussed.

**[Insert questions that invite participant to reframe, prioritise or further explain the key points raised in the interview]**

### The last section: Thank you and end

**Time**: 3

minutes

We’re nearly out of time.

Is there anything that we discussed today that you’d like to talk about more?

Thank you, this has been informative, thank you for your time.

Your insights into **[think of a topic they provided insights into]** will be really helpful in **[Insert objective of research].**

### Future research

One last question; would you like to participate in future research?

## ▐ Interviewing tips

|  |  |
| --- | --- |
| **Overview** |  |
| Purpose | Good research interview facilitation is a skill. These tips are good to keep in mind. |

During the interview:

* Take time to adjust to their conversation pace and style
* Think about your discussion guide and get participants talking with open, neutral questions like:
  + how do you…?
  + what are the different ways you…?
  + what do you think about…?
* Encourage them to give more detail with simple follow-up questions like:
  + you said… when/why/who was that?
  + can you tell me more about…?
  + in what way…?

And more generally, try to:

* focus on stories and real examples - avoid generalities and talking about how things ‘should’ happen
* make sure you really listen - show the participant you’re interested in what they’re saying
* make sure you understand what the participant has said - ask follow-up questions if you’re not sure
* don’t change the flow of the interview abruptly - if a participant goes off topic, wait for a natural break and gently bring them back to what you want to talk about
* try to stay quiet - the more you talk, the less your participant will talk
* don’t stick to your discussion guide rigidly - let the conversation develop naturally and be prepared to dig into any new and interesting issues that come up



Document end.