Conducting in-depth interviews with consumers

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The *ESDT Alliance Consumer Feedback Toolkit* is also available electronically. Microsoft word versions of some tools have also been created so they can be used electronically.

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Table of contents

In-depth interviews provide a rich understanding of an individual's perspective. They utilise semi-structured questions to explore participants' knowledge, beliefs, behaviour and experiences.

This resource provides information about how to plan and conduct in-depth interviews with consumers. It brings together information from the best practice literature and our experience designing and implementing evaluations and consumer engagement strategies within health and community services.

Introduction

In-depth interviews explore participants' knowledge, beliefs, behaviour or experiences through a set of semi-structured questions. Effective interviewers utilise the natural flow of conversation to encourage open communication and explore ideas. This allows you to collect rich information to paint a picture of your consumers' lived experiences and the factors that contributed to it.

Interviews can be useful to understand:

- An individual's perspective or behaviour and the specific circumstances or events that contributed to it (e.g. expectations or experience of a program, strengths and weaknesses of your current approach).
- The needs and perspective of individuals that are representative of a key target group.
- The feasibility of proposed approaches.
- Potential barriers, concerns or opportunities for improvement.
- The context and meaning of other evaluation data (e.g. exploring or expanding on information collected via a survey).
- How to create other data collection strategies, including relevant formats and focus points.

Strengths	Weaknesses
• Provide a comprehensive understanding of an individual's perspective and what's important to them. • Semi-structured approach allows the interviewer to clarify information, ask follow up questions and probe for further detail to gain a deeper understanding of key information. • Social interaction encourages more natural and open communication. • Can be tailored to meet the consumer's needs, skills and abilities (e.g. conducted in the client's own language, additional time allowed to support clients to participate effectively). • Allow the interviewer to explore potentially sensitive information in a safe and confidential environment. • Consumers may feel more comfortable providing feedback in person (rather than via a survey or group setting). • Can be conducted in the client's own home, or within existing appointments/interactions which enables consumers to participate more easily.	• Can be resource intensive and time consuming (unless built in to existing interactions). • Staff need to be trained in interviewing skills and qualitative data analysis. • Results can be biased by: – The interviewer or participant being invested in particular outcomes. – The participant feeling pressure to provide correct answers. – The relationship between the interviewer and the participant. • Results can't be generalised (i.e. you can't assume that your participant's views/experience are shared by others or representative of your population).

Recruiting interview participants

Further information about selecting your approach and each of the key planning steps is included in ***'Collecting and using consumer feedback effectively: Designing your approach'***.

In-depth interviews can be conducted in a variety of ways and tailored to achieve a broad range of objectives. Remember that the scope and content of your interviews will always be driven by their purpose and the needs of your consumers. Once you are clear about what you are trying to achieve, this section includes some key questions that should help you tailor your interview approach.

Who should participate?

In-depth interviews collect detailed information about people's knowledge, experiences, opinions or behaviour. It's important to remember that feedback collected in in-depth interviews is highly individualised and cannot be generalised to a broader group. Selecting the right group of consumers to participate in interviews is critical to your success.

Interview participants are usually selected because they share a key characteristic or experience.

Examples:

- While you work with a broad range of carers, you may interview people who care for a person with dementia in order to understand whether your service meets their specific needs.
- You may conduct interviews with people who stopped attending appointments after 3-6 sessions. You could discuss the reasons why they stopped attending counselling and explore opportunities to address potential challenges in the future.
- After completing a 4 week program for people who have recently been diagnosed with Diabetes, you could conduct interviews with the participants who continue to experience significant highs and lows in their blood glucose levels. This may help you understand whether those participants share specific characteristics that would indicate that the group program may not be appropriate/adequate to meet their needs. It may also clarify whether improvements could be made within the program to support better outcomes for those consumers.

Detailed information about participant selection, sampling and recruitment strategies is included in ***'Collecting and using consumer feedback effectively: Designing your approach'***. Outlined below are a brief summary of some specific strategies to consider when recruiting participants for in-depth interviews.

How many interviews need to be completed?

Due to the time required to conduct and analyse the data, interviews are usually conducted with a small number of participants. There is no set number of interviews required in any given circumstance. The number of interviews required, will be dependent on their purpose and context.

When conducting interviews, you generally reach a point when consistent themes begin to emerge and you start to hear similar ideas from each person. This can be a useful indicator that you have collected enough information. Before stopping your interviews though, review your initial plan and ensure that you've captured the relevant information (and interviewed people that reflect the key characteristics of your target group).

How can I encourage consumers to participate?

- Personally invite consumers to participate. Personalise correspondence and sign letters by hand wherever possible.
- Focus on information that is important and relevant to your specific target group to capture the consumer's attention.
- Clearly describe why you are collecting feedback and how it will be used. If consumers believe that their opinion really matters, they will be more motivated to participate.
- Provide information about the key processes involved so consumers can make an informed decision. Some people are reluctant to participate in interviews because of concerns about privacy and confidentiality.
- Consider opportunities to incorporate interviews into existing service provision (e.g. include a brief interview at the end of an assessment or care planning session).
- Be flexible! Allow consumers to make a choice about how, when or where interviews are completed (e.g. if travel is a barrier, interviews could be conducted in people's homes or over the phone).
- Provide small incentives in recognition of their contribution.
- Reimburse consumers for any costs involved (e.g. travel, child care).

How do I establish consumer consent?

All participants need to provide informed consent before they take part in an in-depth interview. Where possible, this should be documented on a consent form. Consent forms should be tailored to the needs of your consumers so they have all the information necessary to make an informed choice about whether they'd like to participate.

Choosing an interviewer

Who should conduct the interviews?

Interviews can be completed by staff who work with the consumers, a staff member who isn't regularly involved with the consumers or an external person. Strengths and weaknesses of each of these approaches are outlined in the table below. Most importantly though, when deciding who should conduct your interviews, you should consider:

- **What is culturally appropriate and respectful of your consumer's skills and abilities?**
- **Who is most likely to make the consumer feel comfortable to provide feedback about your key issues?**
- **What information does the interviewer need to complete the interviews effectively?**

Interviewer	Strengths	Weaknesses
Staff member who works with the consumer	• Rapport has already been established and the worker will be familiar with the consumer's individual communication needs. • Interviews can be integrated into existing interventions (reducing time and resources). • The worker has a solid understanding of the context of the consumer's feedback.	• The consumer may not feel comfortable providing negative feedback/constructive criticism. • It is generally inappropriate to collect feedback about the service provided or the staff member's approach as this can put the consumer in an awkward position and it's unlikely you will receive accurate feedback.
Staff member who isn't directly involved in the consumer's care	• The staff member represents the organisation which may help to establish rapport. • Interviews can be scheduled at an opportunistic time (e.g. immediately before or after an appointment).	• The consumer may have reservations about providing negative feedback directly to the organisation.
External person	• The interviewer will be highly skilled/trained in interview techniques. • There is no pre-existing relationship between the interviewer and the consumer, so feedback may be more objective and the interviewer can ask for information freely. • The consumer may feel more confident to provide constructive criticism to an independent person. • Dedicated time and resources to complete the interviews (often results in the interviews being completed in a timely manner).	• Developing rapport may require extra time. • The consumer may be reluctant to communicate with someone they are unfamiliar with. • The interviewer needs to be briefed about any specific needs or communication requirements. • Requires dedicated budget.

Interviewer skills

The interviewer's role is to lead the consumer through the interview process and ensure that key information is collected. Interviewers must therefore be confident in the following skills:

- Building rapport and creating a safe and comfortable environment where consumers feel confident sharing their experiences, ideas and opinions.
- Juggling the needs of the consumer with the purpose of the interview.
- Remaining neutral (i.e. Not sharing your own opinions and demonstrating that there are no right or wrong answers).
- Allowing the conversation to evolve at a pace that the participant feels comfortable with and utilising opportunities to explore key ideas as they emerge naturally.
- Tailoring their approach to meet the individual needs of each participant.
- Managing time effectively and keeping the interview on schedule.

Designing your approach

If you collect feedback using a structured set of questions, this is considered a survey.

Surveys are useful to collect information from consumers in a consistent way, so that the results can be collated more easily, used to identify trends or results that may be reflective of the broader population.

Please refer to ***'Developing consumer surveys'*** for more information about this approach, including strategies to support effective phone based and face-to-face surveys.

Interviews can be conducted effectively face-to-face or over the phone. Your approach should be driven by the needs of your consumers (what is going to work best for them) and the practical logistics.

You can conduct short and simple interviews by incorporating 1 or 2 key questions into an existing appointment or intervention. Regardless of your approach, be sure to inform the consumer about why you are asking the question and how the information will be used.

Interviews don't need to be long and complicated.

The following section contains information about the strengths and weaknesses of each approach and provides recommendations about strategies to support you plan and conduct effective interviews.

References

For further information about in-depth interviews see:

Family health international (2005). *Qualitative Research Methods: A data collector's field guide* (see pg. 29–50).

Pathfinder International (2006). *Conducting In-depth Interviews: A guide for designing and conducting in- depth interviews for evaluation Input*.

Delve, H.L. & Limpaecher, A. (2024) *In-Depth Interview for Qualitative Analysis*. DelveTool 2024c, Feb5

Coleman, P. (2019) *In-Depth Interviewing as a Research Methos in Healthcare Practice and Education: Value, Limitations and Considerations*. International Journal of Caring Sciences. V12:3 p.1879

Face-to-face interviews

Face-to-face interviews enable you to build rapport with clients and create a space that promotes open conversation. While most interviews are conducted one-on-one, face to face interviews can also be conducted with a couple, family, or a client and their carer.

Strengths	Weaknesses
• Visual cues (e.g. body language and gestures) provide valuable information to support the conversation. • Easier to build rapport. • Can include practical activities, visual prompts and tools to support consumers to stay focused and provide feedback in a way that suits them. • Likely to have the consumers undivided attention. • Can include more questions (appropriate for face to face interviews to last up to an hour). • Interpreters can be used with minimal disruption to the flow of the conversation.	• Greater time commitment (face to face interviews often take longer as there is more informal conversation and need to factor in travel time). • Travelling to an interview may be a barrier for some consumers. • Some people may feel reluctant to discuss sensitive issues or personal information if they feel intimidated or judged by the interviewer sitting in front of them. • Interviewer safety can be a concern if interviews are being conducted in consumer's homes (or out in the community) with unknown consumers.

Setting up for successful face-to-face interviews

Designing the Interview protocol

- Speaking face-to-face allows the greatest flexibility so you can be creative in your approach. Incorporate practical activities, equipment and visual aids to explore issues in a way that is meaningful for the consumer. This can also help maintain people's interest and focus.
- When you're very confident in your ability to maintain focus and achieve your objectives, consider ways to create opportunities for consumers to take the lead in designing how they will provide feedback.

Recruiting participants

- When feedback is being collected for any reason other than to direct that person's individual service, you must gain consent from the consumer. This includes specifically seeking consent to collect and use that information for your evaluation or quality improvement processes.

Choosing a time and place to conduct the interview

- Face-to-face interviews are most efficient when you can embed interview questions into existing interactions or appointments with your consumers. Think carefully about the amount of time required to complete the interview to ensure that a client's 'treatment' time isn't taken over by your interview. Where necessary, consider scheduling longer appointment times.
- Schedule the time and location of your interviews around what is most convenient and appropriate to the participant's circumstances.
- Create a space that is comfortable and private. Consider the needs of your consumer in relation to the accessibility of the venue.
- Choose a location that is familiar to the participant and/or provide transport to and from the venue. This can increase participants' confidence about attending an interview.
- Sometimes it's appropriate to conduct an interview in the consumer's home. Be aware though that it is more difficult to control the space and minimise disruptions in someone's home, so plan ahead and develop strategies about how you can manage these challenges.

Completing the interviews

- Make sure you are very familiar with the *Interview protocol* before you start. When you're face-to-face with someone, it's very easy to lose track of the conversation and be re-directed onto other topics.
- If you are going to record the interview, let people know in advance and clearly explain how the recording will be used, stored and destroyed.
- The presentation and preparation of the interviewer/s is very important. Take care to dress and act in accordance with community standards. Consider what is culturally appropriate for your customer.
- Practice asking questions and taking notes/recording answers in advance.

Phone interviews

Phone interviews can be a simple and effective way to collect consumer feedback. When speaking on the phone though, it is important to keep it simple, stay focussed and limit the number of questions you ask.

Strengths	Weaknesses
• No travel required. • Consumers may feel increased anonymity and therefore more able to talk about sensitive issues. • Can feel less intense or intrusive. • Telephone interviews are usually shorter than face-to-face interviews. • Interviewer can write notes or refer to written materials discretely, without distracting the participant. • In some cases, data can be entered directly onto a computer, to reduce duplication.	• Unable to observe the participant's body language. • Cannot control other distractions for the consumer. • Interviewer and consumer may talk over one another. • More difficult to maintain concentration over the phone. • When completing an interview with an interpreter, it can be challenging to maintain the flow of conversation over the phone. • More difficult to reach some consumers – particularly those who are financially disadvantaged and may not have access to a phone.

Setting up for successful phone interviews

Designing the Interview protocol

- Limit the length of your interview to a maximum of 30 minutes (15 minutes maybe more appropriate for many consumers). Remember to factor in time to introduce the interview and answer any questions or concerns the person may have.
- Focus on one or two key issues. This ensures you can explore the relevant issues in detail without losing concentration or the interview becoming too arduous.
- Consider whether visual cues would support the consumer to participate effectively. If so, send the resources out prior to your scheduled interview time. Make sure the participant has the information in front of them before you get started.

Recruiting participants

- Let people know in advance that you will be completing interviews over the phone.
- If you anticipate the interview will take longer than 10 minutes, schedule a set time to call them.
- Consider how and when you need to gain consent from consumers to participate. In some circumstances, you should collect consent prior to including their number on the call list (especially when the interview is being completed by an external agency).

Developing systems to structure and track calls

- Set clear guidelines about how many times people will be called.
- Develop systems to manage callbacks to ensure that you only set call back times when you're sure that an interviewer will be available.
- Design a call sheet to track the outcome of your calls (see example below). A call sheet allows you to record information about the outcome of your calls and keep track of your ongoing work. This is particularly useful if multiple people are completing interviews or you have a large number of interviews to complete.

Example Call Sheet Design:

Consumer Name:	Bob			
Phone Number:	1234 5678			
Contact Attempt	Staff Initials	Date	Time	Outcome
1	KP	10/9	11:15am	No answer
2	LD	11/9	3:30pm	Spoke to Bob's wife, Mary. Request Call back 4pm 12/9
3	DP	12/9	4pm	Interview complete

Completing the interviews

- Be prepared – make sure you have all of the information you need before making the call.
- Consider how you will take notes and record answers. Phone based interviews can be recorded by connecting a voice recorder to your phone. Always remember to inform the participant how and why you are recording information.
- Before you start, check to make sure that the participant is comfortable and ready to begin.
- As you can't rely on the person's body language, check in periodically to make sure they are ok to continue or whether they need a break.
- Tell the participant that you'll be writing notes during the interview and let them know if you need a minute to catch up.
- Clearly explain to consumers that they have the option to opt out, or take a break at any time.
- Allow time directly after the interview is complete to review your notes and ensure that all responses have been recorded as accurately, legibly and completely as possible. If anything is unclear or incomplete, or a question has been missed, you should call the person back as soon as possible, apologise for the oversight and ask for further information.

Conducting effective interviews

This section includes general information and ideas about strategies that can support you to run effective in-depth interviews. While interviews should not be completely scripted, it's essential to develop a clear plan to help stay on track and keep to the allocated time.

Developing an Interview protocol

An *Interview protocol* provides the framework for how the interview will run, including your key objectives, priorities and processes clearly documented. This promotes consistency, assisting you to identify trends or similarities in people's feedback. When interviews are conducted by multiple interviewers, having a clearly documented *Interview protocol* is even more important.

Your *Interview protocol* should include the following key elements:

- An overview of the purpose and goals of the interviews.
- Roles and responsibilities for staff before, during and after the interviews.
- The information provided to participants prior to the interview including recruitment and consent strategies/tools, confirmation and reminder processes.
- An introduction statement.
- Key questions and examples of relevant prompts.
- Agreed note-taking/recording instructions.
- Risk management strategies.
- Conclusion and summation statements.
- Follow up activities.

Knowing your *Interview protocol* allows the conversation to flow from one topic to the next, building on the participant's answers. Therefore, if the participant starts discussing pertinent information out of order, you can swap the order of the questions and maintain the flow.

While an *Interview protocol* is designed to promote a consistent approach, the priority should always be to conduct effective interviews that make it as easy as possible to collect the feedback you need. After each interview, reflect on what did and didn't work and revise your *Interview protocol* accordingly. Ideally, your core questions should stay the same, but the way you ask the questions, and the strategies you use to probe for more information, may change. When reporting your results, it's important to describe any changes you made to the *Interview protocol*.

An *Interview protocol* template is included in ***'Consumer interview tools and templates'***. The protocol is not designed to be a script you recite, but should include key information and questions to ensure you stay on track and are very clear about the goals and priorities of the interview.

There is no single set of questions that you can ask to collect great feedback from everyone. Every interview will be different! The information you collect and how you collect it should be driven by your purpose and your consumer.

Beginning the interview

Successful interviews rely on successful communication and shared understanding of the purpose and process of the interview. Therefore, while you will have provided the consumer with information before the interview (i.e. as part of recruitment and scheduling), it's essential to reiterate key information at the beginning of every interview.

Your introduction should include the following key points:

- Personal introductions, welcome and thank you!
- An overview of the topic and purpose of the interview.
- Why they have been asked to participate and the value of their feedback.
- The general structure of the interview, including the scheduled duration, breaks, how you would like them to participate, opportunities for them to ask questions or share additional information.
- Consent process and opportunities to opt out or have a break (e.g. remind them that they don't have to answer any questions they are uncomfortable with and can stop at any time).
- How information will be recorded, analysed and reported. As interviews often collect detailed information from a small group of people (and are usually conducted one-on-one), it is especially important to reinforce how you will protect the consumer's confidentiality and ensure they cannot be identified.
- An opportunity for the consumer to ask questions or raise concerns.
- When you've completed your introduction and addressed the consumer's questions, confirm they're ready to start.

It is useful to create a script, or prompt sheet for your interviews that can be included in your *Interview protocol*. This will ensure that the key points are covered and promote consistency across interviewers.

An effective introduction is key! By outlining your expectations, you can set the tone of the conversation and help participants understand how they should participate.

The following example demonstrates one way that key information can be discussed, using language that is meaningful and relevant to the participant. You should always tailor your introduction to reflect the purpose, context and scope of the interviews you are completing.

Example:

Thank you (participant name) for making the time to talk to me today.

My name is Lou and I will be conducting the interview. I work here at Marvellous Managers as a quality manager. I work with all of our Community Services teams to make sure that we're doing everything we can to deliver the best possible services to our community. One of the big changes we've been working on this year is developing care plans with all of our clients.

Last month, you worked with our assessment officer, Tracey to develop your care plan. Today, I'd like to talk about your experience developing and using your care plan. I'd also like to hear your ideas about how we can improve our processes and the care planning tools we use.

This is the first step for us. I'm conducting interviews with 10 clients to help us understand the issues around care planning that are important to our clients. Then we will develop a survey to send out to all of our clients later this year. This will help us to learn more about how we can make the most of our care plans and make them as useful as possible for our clients.

All of the feedback you give us will remain strictly confidential. None of your personal information will be shared with anyone. Your name will not be attached to any of your comments and we will change any personal details that might identify you, to make sure that what you tell us remains private. If you tell us about any serious problems, we will work with you to solve them. If I don't have all of the information we need, I'll make sure we find the right person to help. Regardless of the feedback you give us, we will not take away services that you need.

I would like to use this tape recorder to record today's interview so I can just concentrate on our conversation. I'll still take a few notes, just to keep me on track and make sure that I don't forget anything. No one else will have access to the tape. Once we are finished, I will use the tape to type up a record of the interview and then the tape will be destroyed. Is that ok with you?

We're aiming to complete all of the interviews this week and then we'll write a summary report by the end of July. We're going to share the report with our assessment team so we can work together to address any urgent issues and then get to work on designing the survey. We will also send you a copy of the summary report and an update about the changes we're going to make. We'll also share information about the survey, and the final results in our regular newsletters.

Do you have any questions, or is there anything else you'd like to know before we start?

I have a list of key questions that I'd like to ask you. You may also have some information or ideas that we haven't thought of. I really want to hear what you think is important about care planning. Please feel free to tell me whatever you think. If we haven't covered everything at the end, there will also be an opportunity for you to share extra ideas.

We've set aside 45 minutes for our conversation today, so we will aim to be finished at 11am. I know your time is precious, so I will keep track of the time and will let you know when we have 10 minutes to go. If you need a break at any time, please just let me know.

Are you happy to get started?

Asking interview questions

In-depth interviews are not designed to be scripted. It is important though, to develop a set of key questions that will guide the conversation. Allow time to be flexible and encourage people to share the information that they think is most relevant. You also need to consider what is appropriate for your participants, what is achievable within the timeframe (and within your skill set) and what is most important. It can be difficult to know how long it will take to answer each question, or how many questions should be included in an interview. The only way to test this is to practice! As a general guide, it may be appropriate to include 6 – 10 key questions within a one hour interview.

Writing interview questions

- **Write a list of the themes you want to cover and prioritise them.**

  Identify the questions you must ask and any questions that would be 'nice to know' (but aren't essential).

- **Ask positive, open ended questions**.

  Open questions promote discussion and create space for the participant to share the information that is most important to them. Only use closed questions when you need to check facts or as a gentle introduction to a new topic.

> ***Example:***
>
> Asking negative questions like "why haven't you", "why don't you", "why can't you" can be intimidating and reinforces the person's weaknesses or mistakes.
>
> Instead, reframe the question to ask about "Why do you feel like that?", "Why did you decide on that approach?", "Have you tried any other ways of doing it?"

- **Personalise the questions.**

  Use the person's name and integrate relevant details about their circumstances as much as possible. This helps to build rapport and demonstrate the relevance of the questions.

- **Develop prompts and probing questions.**

  Brainstorm and practice the prompts and probing questions you can use to expand on your questions, clarify and explore responses. Asking probing questions is also a useful way to build rapport, show the participants that you value their feedback, recognise their expertise and demonstrate the level of detail that you're looking for.

> ***Example:***
>
> Probing questions can include:
>
> Tell me more about …
>
> What happened then?
>
> Why do you think …
>
> Could you give me an example of …
>
> Can you explain XXX a bit more?

Recording information

When reporting your interview findings, using direct quotes and/or writing case studies can be a powerful way to share your learnings and tell a consumer's story. It's important to consider how you will capture the detail of each participant's responses so you can use their feedback in meaningful ways.

Recording interviews (via audio or video) provides a detailed record of the conversation, however it may also be appropriate to take notes throughout the interview. The table below includes a summary of the strengths and weaknesses of each approach and strategies to support effective recording.

Whichever option you choose, always tell the consumer how the information will be recorded, stored and destroyed.

Recording approach	Strengths	Weaknesses	Recommendations
Using a recording device	• Allows you to focus on the conversation and maintain rapport. • Enables a more natural flow of conversation. • You can go back and clarify, or review information after the interview. • Allows you to capture verbatim quotes.	• If the recording does not work, the entire interview is lost. • Time consuming to transcribe. • Consumers may feel self-conscious or concerned about confidentiality which can bias their responses.	• Practice setting up and using the device before the interview. • Have a backup plan!
Taking detailed notes	• Reiterates that the conversation is confidential. • Some consumers feel that their information is valued and important when they see their answers being written.	• Very challenging to maintain a natural flow of conversation while writing notes.	• Create a note taking template to record notes in an organised way (practice using it). • Consider whether it's appropriate to have someone else sit in during the interview to take detailed notes.

Concluding the interview

Once you've collected the information you needed, allow time for the participant to ask questions and share other information they think is relevant. To encourage participants to share their ideas, you should:

- Allow 10 minutes at the end of your interview for this discussion.
- Reinforce that you're there to learn from the consumer and genuinely value their ideas.
- Reflect on something particularly interesting or valuable they've shared.
- Ask the participant about their experience.

Finally, you should:

- Provide a summary of the key points you discussed.
- Clarify the next steps, including when and how you will share the results.
- Provide the participant with contact details of someone they can speak to if they have any follow up questions, additional feedback or concerns. Ideally, you should provide your own contact details and the details of another staff member/stakeholder.
- Ask the participant if they have any other questions.
- Thank them for their valuable contribution!

Follow up activities

Debrief

Immediately after the interview, review your notes and add relevant details. Even if the interview was recorded, it's useful to make notes about your experience of the interview and your key learnings. Reflect on what worked well, what didn't work and any unexpected information or reactions.

Transcribe recordings

During formal research, interviews are generally recorded and transcribed verbatim, however you should determine what is appropriate depending on the context of your interviews and how the information will be used. It may be adequate to document key themes.

Notes about your own experience and observations should also be recorded and stored alongside the transcripts.

Provide participants with the opportunity to review their transcript and a summary of the themes to ensure that you have accurately interpreted the information. For some consumers, it may be necessary to review this information in person, or over the phone, rather than sending out large documents. While many consumers don't feel like it's necessary to review their information, you should always provide them with the opportunity.

Review and update the Interview protocol

While your *Interview protocol* is designed to promote a consistent approach, the priority should always be to make it as easy as possible for consumers to provide feedback in a way that allows you to answer your evaluation questions.

After each interview, it is important to reflect on what did and didn't work and revise your *Interview protocol* accordingly. Ideally, your revisions should maintain your core questions, but the way you ask the questions, or strategies you use to probe for more information, may change. If you add new questions, it is important to document this in your report.

Managing challenges

Careful planning is important to ensure that it's as easy as possible for consumers to participate and provide you with useful feedback.

Brainstorm potential challenges and risks

It's important to consider any challenges that may occur while you're planning or conducting your interviews and plan ahead so you can avoid (or at least minimise) as many of these challenges as possible.

Consider the challenges for consumers and the challenges you may experience planning or coordinating the interviews, recording information and analysing the results. Think about:

- How can you ensure that everyone has equitable opportunities to participate in your interviews and/or provide feedback in a way that is appropriate for them?
- How can you ensure that every interview participant feels safe, comfortable and able to participate effectively?
- What information does each participant need and how should this information be shared? While you want to provide everyone with consistent information, the way you share information and the level of detail provided should be tailored to the individual.
- What could go wrong planning or conducting the interviews? What's your back up plan?

A brainstorming template is included in ***'Consumer focus group tools and templates'***. This would also be appropriate to use when preparing for in-depth interviews.

Common challenges

Included below are a summary of common challenges that occur during in-depth interviews and strategies that can be effective to manage them. We encourage you to consider these issues when designing your *Interview protocol* and identify the strategies that you can implement to minimise or mitigate these challenges.

Challenge: The participant has little to say, provides vague responses, Yes/No answers etc.

What to do:	What not to do:
• Encourage the participant to elaborate by: – Asking probing questions. – Prompting them to explain their answer or provide you with examples. – Using body language and silences (e.g. nod and wait). • Ask the question in a different way. • Move to a different question and listen for cues throughout the conversation that would allow you to follow up on the relevant issue. • If the participant feels uncomfortable answering a question, respect their decision and thank them for their honesty. • End the interview if the participant is unable or unwilling to answer your questions effectively. • Review and revise your *Interview protocol* to address any ongoing challenges/gaps (consider your recruitment strategy, interview format, structure and content).	• Keep asking the same question over and over again. • Start with highly personal, sensitive or controversial questions. • Keep pushing when the participant has had enough (you may risk the client fabricating the answers or disengaging completely).

Challenge: The participant describes other people's experiences or opinions

What to do:	What not to do:
• Reinforce the value of the participants own unique knowledge and experience. • Remind them that there are no right or wrong answers. • Use their name and ask specific questions or ask them to provide examples of their own experience. • If they don't have any experience or ideas about a specific question, reassure them and ask if they're happy to move on to the next question. • Ask them if they feel the same way and/or how they feel about the other person's experience.	• Assume that the participant's experience/opinion is the same as the people they are describing. • Record the information as if it is their own experience. • Keep pushing if they are uncomfortable sharing their own perspective.

Challenge: The participant strays off the topic	
What to do:	**What not to do:**
• Provide a clear introduction at the beginning of the interview about the key issues/topics you will be discussing and refer back to this. • Listen for a natural segue and redirect the conversation by repeating or re-phrasing the question. • Reiterate the time restrictions of your interview (reinforce that you don't want to keep them later than expected). • If the participant raises an issue that is beyond the scope of your interview (but needs to be addressed), write a note and let the participant know how the issue will be followed up.	• Embarrass or discipline the participant. • Include lots of facts or complex information that could confuse or overwhelm consumers. • Ignore signs of impatience, annoyance or boredom.

Challenge: The participant provides information about an upcoming question	
What to do:	**What not to do:**
• To maintain the flow of the conversation, take the opportunity to listen and explore the issue as it arises naturally. Be sure that when that line of questioning is completed, you go back to your original question and collect any additional information. OR • Acknowledge that you'd like to explore that issue and will come back to it later. Repeat your original question to re-orient the participant and collect the relevant information. When it's appropriate, acknowledge that you'd like to come back to that issue, paraphrase what they have already told you and then encourage them to explore it further.	• Interrupt them.

Challenge: The participant starts interviewing you	
What to do:	**What not to do:**
• Reinforce they are the expert. • Let them know you have written down their questions and offer to follow up after the interview. • Remain neutral. • Deflect questions that ask for your opinion.	• Allow them to take control of the interview. • Share your ideas as this can influence (bias) their responses. • Embarrass or discipline them.

Challenge: The participant raises an issue of concern and/or becomes emotional	
What to do:	**What not to do:**

• Before you start interviewing, document a clear plan about who or how support can be provided if this situation arises.
• Listen to what they have to say and acknowledge their feelings.
• Take a 5 minute break.
• Request the participant's consent to raise the issue with an appropriate person (e.g. manager) and advise them of the follow up process.
• If the participant shares information that you feel puts them at risk, you are obliged to provide them with accurate information.
  – If you have serious concerns, stop or suspend the interview.
  – In many cases, it is appropriate and ethical, to provide information or feedback after the interview is completed.
	• Ignore it!
	• Continue the interview if you have significant concerns about their safety or wellbeing.
	• Stop and correct people about information that is incorrect if there are no safety concerns (i.e. they have misinterpreted information or are telling you something false).

Example:

If a participant tells you that they have stopped taking their heart medication because they heard it could give them cancer, you have a responsibility to follow this up. You need to use your professional judgement, to determine the appropriate response.

- If the person appears unwell, is experiencing chest pain or is highly anxious, stop the interview and attend to the issue immediately.
- If the person appears well and reports no concerns, you may choose to continue. Once you have completed the interview, you should follow up with the person about their heart medication and ensure they can access accurate information. You may not know the answer yourself (and that's ok). Your responsibility is to offer to connect that person to someone who can provide them with accurate information.