

Consumer interview tools and templates



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

<https://www.esdt.com.au/>

<http://kpassoc.com.au/>

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The following templates have been developed to support you to develop an *Interview protocol* for your consumer interviews. These templates are designed as examples only and should be updated and modified to meet your needs.

An *Interview protocol* provides a framework for your interviews to promote consistency and maximise the credibility and reliability of your data. It will also help you design interviews that are ‘fit for purpose’ and support you to collect meaningful feedback.

An *Interview protocol* provides the framework for how the interview will run, including your key objectives, priorities and processes. While interview protocols are 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 information you need to answer your evaluation questions.

The *Interview protocol* should be reviewed and revised after each interview to ensure it remains relevant and useful. If significant changes to your protocol are required, be sure to include this information in your evaluation report.

Interview protocol templates

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Further information about developing an *Interview protocol* and other aspects of effective interviewing are included in ‘**Conducting in-depth interviews**’.

Examples of other relevant tools and templates are also included in ‘**Focus group tools and templates**’ including:

- Note taking template.
- Equipment checklist.
- Brainstorming template: Potential challenges and risks.



Interview purpose and approach



This provides essential background information about the purpose of your interviews which will guide the development of your approach. **You should not proceed with your interview planning until you can confidently answer each of the questions included in this template.**

<p>What is the purpose of the interviews?</p> <p><i>Consider how these interviews fit with other elements of your evaluation and/or your broader quality improvement activities.</i></p>			
<p>How will the interviews be conducted?</p>	Face-to-face	Phone	Combination
	Why is this the most appropriate approach?		
<p>Who is the target group?</p> <p><i>What characteristic or experience do they share?</i></p> <p><i>Be specific!</i></p>			
<p>How many interviews will be completed?</p>			
<p>Does your target group have any particular needs?</p> <p><i>Consider the features of your target group such as age, culture, language, function (e.g. vision, cognition, physical access).</i></p>			
<p>Which staff will be involved in the interview process?</p> <p><i>Include internal and external staff who will be involved in coordinating, designing and conducting interviews, collating and reporting results.</i></p>			
<p>Checklist completed by:</p> <p>Date:</p>			

Roles and responsibilities

Key tasks (list the agreed tasks under each heading)	Person responsible	Timeframe	Complete (sign & date)
Recruiting participants <ul style="list-style-type: none"> • Invitations & information resources. • Confirmation and reminder process. • Document and share interview details. • Collate/manage interview schedule. 			
Venue and equipment <ul style="list-style-type: none"> • Consider booking and setup of interview space. • Transport (taxis/cars for staff and/or consumers). • Catering. • Visual aids, recording equipment etc. 			
Participant incentives/reimbursements			
Consumer consent <ul style="list-style-type: none"> • Developing consent forms. • Documenting consent. 			
Developing interview questions <ul style="list-style-type: none"> • Initial development. • Pilot and review. • Endorsement of final questions. 			
Completing interviews			
Recording information			
Collating and analysing feedback			
Writing report			
Circulating report			

Interview schedule



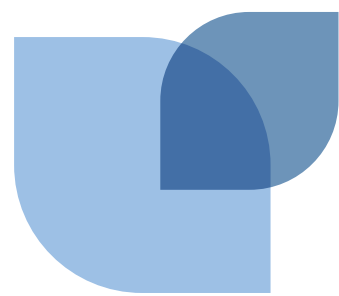
This template includes key information that should be documented as interviews are scheduled. Information about upcoming interviews should also be collated into an interview schedule to minimise the risk of double booking and to allow you to track recruitment progress etc.

It's important to ensure this information is documented consistently. When deciding on the best way (and place) to document the interview details, you should consider:

- **How and when will the information be collected?**
- **Who needs this information?** (e.g. reception staff to greet participant on arrival, interviewer).
- **When is the information required?** (e.g. if the interviews need to be de-identified, interview details should be recorded on a separate piece of paper and destroyed when the interview is complete).

Participant name	
Date and time	
Venue	
Participant needs	<ul style="list-style-type: none">• Document specific information that will assist the interviewer to complete the interview. This may include cultural considerations, physical accessibility, equipment, or communication strategies that will support the consumer to participate effectively.• If you're interviewing consumers that are known to you (or other members of your team), document relevant information prior to recruitment.• If the interview is being conducted by someone who is unknown to the consumer, ask the consumer about their needs during the recruitment process. For example: "It's important to us that you feel comfortable during the interview. Is there anything that you'd like the interviewer to know beforehand? Is there anything we can do to make it easier for you to be involved?"
Interpreter required	Yes / No If Yes ... Language
Interviewer details	Name: Contact Details:
Assistant/s	Name: Contact Details:

Interview structure and processes



This tool is not designed to be a script you recite, but should include key processes, strategies and relevant questions. It helps interviewers stay on track and promotes a consistent approach.

Introduction		
Key points	Content	Time allocated
Welcome and introductions	<ul style="list-style-type: none"> • <i>Welcome the consumer and introduce yourself (and note taker if relevant).</i> • <i>It can be useful to ask the consumer about their motivation for participating in the interview and whether they have any specific expectations.</i> 	
Purpose of the interview/s	<ul style="list-style-type: none"> • <i>Provide an overview of the topic and purpose of the interview including:</i> <ul style="list-style-type: none"> – <i>Key points for discussion.</i> – <i>How the information will be used.</i> – <i>Value/Importance of participant's contribution.</i> 	
Schedule	<ul style="list-style-type: none"> • <i>Introduce how the interview will run including:</i> <ul style="list-style-type: none"> – <i>Duration and breaks.</i> – <i>Expectations about participation.</i> – <i>Opportunities for them to ask questions or share additional information.</i> 	
Recording/data collection and reporting strategies	<ul style="list-style-type: none"> • <i>Show the participant how information will be recorded, analysed and reported.</i> 	
Consent and confidentiality	<ul style="list-style-type: none"> • <i>Reinforce consent and confidentiality. Remind the participant that they don't have to answer anything they are uncomfortable with and can stop at any time.</i> 	
Any questions???		
Are you ready to get started?		

Interview questions		
Key points	Content	Time allocated
Engagement question/s	<ul style="list-style-type: none"> • <i>Begin with easy questions to build rapport, create a sense of safety and introduce the topic for discussion.</i> 	
Exploration questions	<ul style="list-style-type: none"> • <i>For each question include:</i> <ul style="list-style-type: none"> – <i>Key question.</i> – <i>Purpose.</i> – <i>Format/structure.</i> – <i>Equipment required.</i> – <i>Prompts/probing questions.</i> 	

Concluding the interview (allocate a minimum of 10 minutes)		
Key points	Content	Time allocated
Summary of key points	<ul style="list-style-type: none"> • <i>Provide a summary of the key points you discussed, noting any particular highlights and key learnings.</i> <p><i>NB: You may invite the assistant/notetaker to participate in this part of the discussion.</i></p>	
Final questions	<ul style="list-style-type: none"> • <i>Ask the participant:</i> <ul style="list-style-type: none"> – <i>If they'd like to share any other relevant information (e.g. Have we covered everything about XXX that you think is important? Is there anything that we've missed?).</i> – <i>About their experience of participating in the interview.</i> – <i>Whether they have any questions or concerns?</i> 	
Purpose of the group	<ul style="list-style-type: none"> • <i>Reiterate the purpose of the interview and how the information will be used.</i> 	
Next steps	<ul style="list-style-type: none"> • <i>Clarify the next steps, including when and how you will share the results.</i> 	
Staff contact details	<ul style="list-style-type: none"> • <i>Provide contact details of someone they can speak to if they have any follow up questions, additional feedback or concerns.</i> 	
Thank you		



