

How to... Have individual conversations

1. Why use this method?

The **benefits** of having individual conversations (also called interviews) are:

- they enable a deep source of insight into people's experiences, attitudes and beliefs. There is the ability to clarify and confirm what is being said in a way that is more difficult with other engagement methods, such as surveys.
- you can begin to understand wider issues that interlink and have impacts on the topic you are discussing when the conversation is free flowing.
- some communities/people will feel more comfortable feeding back individually.

But, there are some **considerations**:

- Intensity in terms of time (planning, undertaking and analysis), expense, and possible emotional strain (if topics being discussed are sensitive/ traumatic).
- A skilled facilitator is needed to lead and record each conversation.

2. Planning for individual conversations

A. Different types of conversations

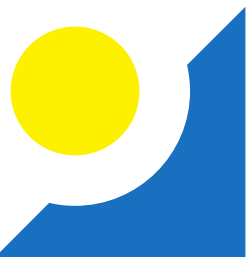
The type of conversation you want to have will depend on the purpose of your project. There are three main types of conversations:

- **Unstructured** - none of the questions are predetermined in topic or order. This supports co-production ([see top tips for co-production](#)) – beginning from scratch with no preconceived ideas or agendas.
- **Semi-structured** - a few questions are predetermined, but other questions aren't planned.
- **Structured interviews** – the questions are predetermined in both topic and order.

B. Identifying roles and responsibilities

Whichever type of conversation you plan to have, you will need to identify people to undertake these roles:

- **Point of contact** – communicating with participants before, during and after the conversations have happened to make sure questions are answered and the conversations are organised and set-up smoothly.



- **Facilitator** – responsible for leading the conversation, from the ICS perspective and asking the key questions.
- **Note taker/ recorder** – responsible for accurately capturing feedback during the conversation and for finalising information after the session. Recording devices and transcription software may be used with the participants permission.
- **Reviewer** – responsible for reviewing the outputs of all conversations and analysing the key themes and trends to be presented in a feedback report.
- Depending on how many conversations you plan to have, these roles might be performed by one or many people.

C. Creating a conversation guide

A conversation guide (see Appendix), prepared in advance, provides the facilitator with a script for how the conversation will flow (less common with unstructured conversations). It sets out the key topics to discuss and some prompts to help keep the conversation flowing. [Read the how to guide on developing effective survey questions](#) to support you.

The facilitator uses this guide flexibly; encouraging participants to elaborate on their answers, following the direction of the conversation and changing the questions accordingly. It is important to consider the time available and the number of questions you will be asking.

To make participants feel more comfortable and prepared, consider whether you want to share the questions you will be asking with them in advance.

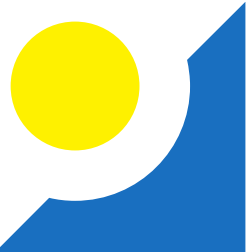
D. Setting

It is important to decide where you will have these conversations. Work collaboratively with the people you will be speaking to, to decide what is best. If you have any limitations on where you can conduct these conversations, make it clear from the start so people can choose whether they want to participate, or not.

Individual conversations can be conducted face-to-face or online (over the telephone or via video conference). Face-to-face interviews may take place in people's own homes, a private room or in a public place. It's important to make sure conversations can't be overheard, to protect privacy.

Things to bear in mind:

- Face-to-face interviews can generate anxiety or participants may be affected by the interviewer - feeling pressured to respond in a manner they perceive will please you. Some people/groups may prefer working face to face so they can see you and understand your body language.
- Video calls can sometimes feel awkward or stilted, which could affect how your participant responds. However, they may be more comfortable in their own home.



- Not being face to face with participants, such as in a telephone conversation, could lead to more honest answers – particularly if the topic is sensitive/traumatic. However, there could be environmental conditions or distractions on the participants side that could affect their responses.

E. Recruiting and preparing participants

Having undertaken your [stakeholder mapping](#), you'll have identified those you want to have conversations with.

To recruit participants, you will need to consider how you will advertise this opportunity. It should be clear:

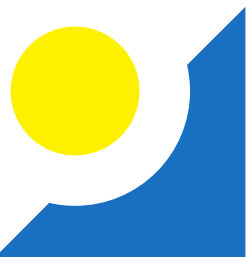
- What the purpose of these conversations are,
- When and where they might take place (or if there is flexibility in this),
- How much time the conversation will take,
- What topics participants might be asked about,
- If they need to fit any criteria to participate (i.e. having accessed certain services recently),
- How you will recognise their contribution (i.e. will they be paid for their time/ reimbursed in other ways) and,
- How their participation will influence the project.

Once participants express an interest, find out from them what adjustments they might need for you to have the best conversation with them. This might include things like:

- Taking regular breaks if topics are emotive or traumatic,
- Being able to skip questions and stopping the interview at any time,
- Enabling a support worker or advocate to attend the session with them,
- Arranging an interpreter,
- Supplying information about how to use any online video platforms/ technology they may need to engage with,
- Paying attention to the environment in which you are having your conversation – some spaces might be intimidating or unfamiliar and, therefore, unsettling for some participants,
- Being able to signpost to support services if they are affected or upset by what the conversation might bring up for them and,
- Checking if they would like to see the write up of their session and make any corrections/ alterations.

Prepare participants for the conversation:

- Confirming (in writing and/or over the phone) when, where and how the conversation will take place.
- Explaining how the feedback will be collected and used



- Explaining you will invite them to complete demographic monitoring forms and consent forms as part of the process. Be sure to explain why these are important.
- Explaining and agreeing who will be “in the room” when the conversation happens.
- Encourage them to ask questions about the process.

F. Getting consent

It's important to anonymise feedback received so that individual participants cannot be identified. It is essential to get your participants permission [using the photograph / film consent form](#) if you want to:

- Take photographs/ videos of them,
- Make an audio recording of the conversation,
- Use their feedback to create a case study/ persona,
- Quote them directly and,
- Use any content on social media or in press releases, webpages, blogs, or in internal or external reports etc.

If you are working with children and young people under 18 you will need parental consent to work with them.

3. Undertaking individual conversations

Before the conversation:

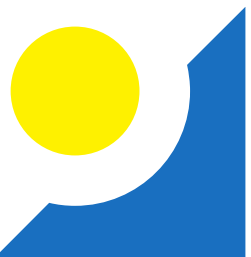
- Remind your team of the purpose of the conversation/ reshare the conversation guide.
- Establish clear roles for anyone who will join (for example notetakers, observers etc.).
- Set up the room/ do a tech check: confirm that screen sharing, recording, etc. works.
- Double-check any links, files, etc. that participants will need.
- If working face-to-face, make sure you have hard copies of your conversation guide and consent forms/ demographic monitoring forms as well as any forms of reimbursement you may be using.

During the conversation:

- Remember your conversation guide is just that. Having some flexibility will make your participant feel more comfortable with giving open and honest answers.

After the conversation:

- Review how the conversation went and consider if the guide needs to be updated.

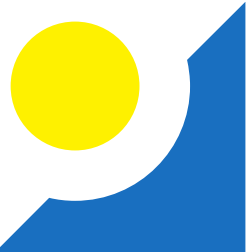


- Begin reviewing and analysing the feedback received, ready to support your decision making.
- If you promised the participant any follow-up communications, identify who will send them and when.

Bibliography

NHS England (2018): Bite-size guide to patient insight: Building greater insight through qualitative research. [bitesize-guide-qualitative-research.pdf \(england.nhs.uk\)](#)

Scribbr (2022): Unstructured Interview | Definition, Guide & Examples [Unstructured Interview | Definition, Guide & Examples \(scribbr.co.uk\)](#)



Appendix: Individual conversation guide example

Date of session:

Time of session:

Location of session:

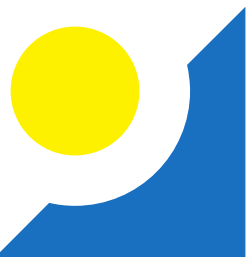
Supporting staff/roles required:

i.e. Facilitator x 1

Note taker x 1

Materials required

- Any pre-reading that has been sent out in advance
- Equalities monitoring forms
- Consent forms
- Any forms of reimbursement
- Recording devices



Session outline

Timing	Content	Lead
	<p>Welcome and working together</p> <ul style="list-style-type: none"> • Thank the participant for their time • Introduce yourself, and anyone who is joining you • Confirm the expected length of the interview <p>Explain:</p> <ul style="list-style-type: none"> • How you'll take notes (for example, video recording). • How you'll use any notes you take • If anything discussed leaves participants feeling upset or distressed, explain who they can speak to for support • Ask the participant if they have questions at this time • Seek their consent for any recording • Next steps 	Facilitator
	<p>Setting the context</p> <p>Explain:</p> <ul style="list-style-type: none"> • The purpose of the conversation • Main topics to be covered • Check in with the participant that they have completed and understood any pre-reading • Refresh the participants understanding of any key areas of the project that are important (i.e. any proposals, ideas, plans that you are looking for comments on) <p>Ask the participant if they have any questions</p>	
	<p>Questions to be explored</p> <p><i>When structuring your interview questions, think about the steps in the person's journey you want to learn about and think about prompting to hear about what's working well and where things could be improved.</i></p> <p><i>As an example, you might ask: What kind of health and care information and support would be helpful for you, and your family?</i></p>	Facilitator and participant

	<p><i>Within this, you could ask when they've needed information and advice, where did they go first of all? How easy was it to find what they needed? What might have made that easier? What happened next?</i></p> <p><i>Try to focus on that person's individual experience; what can we learn from what has actually happened. What does that tell us about our services, and about this person's needs?</i></p>	
	<p>Next steps</p> <p>Explain how feedback will inform the project</p> <ul style="list-style-type: none"> ● Each session is being written up ● Feedback from all engagement activities will be reviewed and analysed. ● Explain how findings will be presented – ideally made publicly available and shared with those who gave their feedback ● Outline any further opportunities to get involved (now and in the future) <p>Check if the participant has any questions</p> <p>Ask them to complete demographic monitoring information/ consent forms</p>	<p>Facilitator</p>

