



# PLANNING YOUR APPROACH

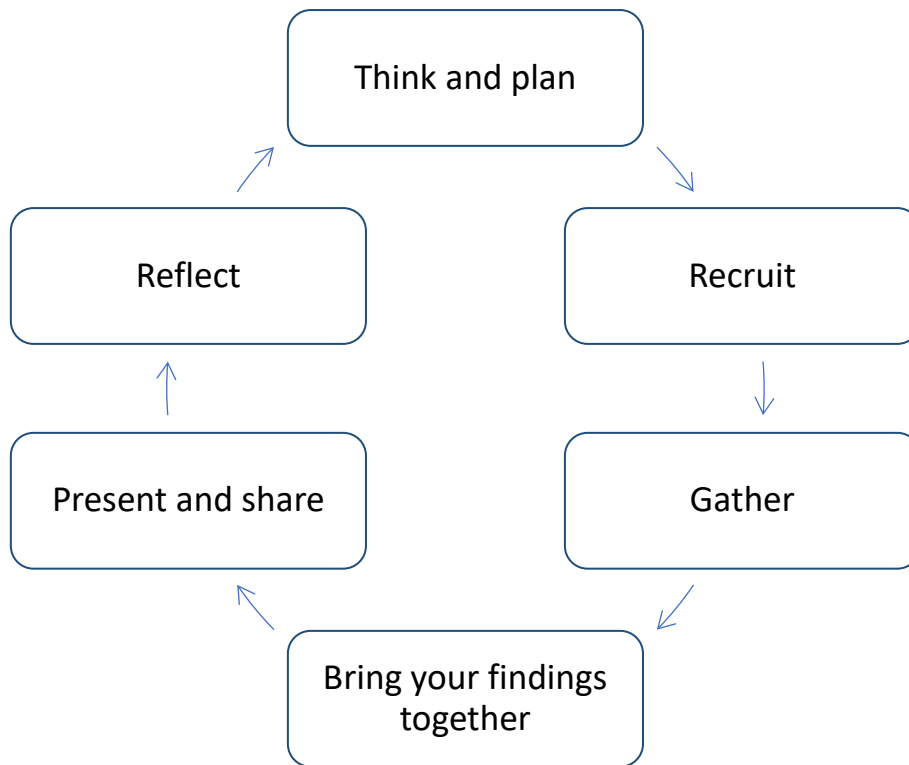
This is the first of five sections of the Qualitative Insight Toolkit.

Qualitative insight is information gathered from people that describes their experiences, opinions, and motivations. This insight can be used to help us understand people's behaviour and influence decision making to better suit the needs of people and communities.

This section helps you to think about the different stages of your approach to capturing qualitative insight. This can help you to identify strengths you have and challenges you may need to consider before starting your work.

# Section 1: Planning Your Approach

Before you start to gather insight, it is useful to think about the different stages of your work in advance. This will help you to establish your goals and make decisions that are guided by them. It may be helpful to think of qualitative insight gathering as a cycle:

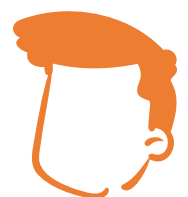


## Qualitative Insight Plan

The Qualitative Insight Plan shown on the next page provides suggested questions and prompts you can ask yourself to guide your planning. This can help to identify strengths you and your team have and challenges you may need to consider before starting your work.



As you begin in to gathering insight, it can be tempting to take on more than you planned. Keep referring to your plan to stay on track with your goals.



## 1. What do I already know about this topic or community?

- What do I already know?
- Where has this information come from?
- What insight have others gathered?
- Have I thought about my own bias?

## 3. What capacity do I have?

- What are my timelines? Will I gather insight as part of my everyday work, or dedicate additional time?
- Do I have the resources and training needed?

## 5. How will I gather my insights?

- Where will I gather insights?
- What methods will I use?
- What questions will I ask?
- How will I gather the insights?

## 7. How will I bring my findings together?

- What time do I have to bring my findings together?
- Themes are the common topics people talk about. How will I identify themes within my insight?
- Who can support me to review my gathered insights?

## 2. What do I want to find out?

- What are my broad questions? *E.g., Why do people access my organisation?*
- What gaps could my insight fill?

## 4. Who will I engage with?

- Who might have experience or views on my topic?
- Am I overlooking anyone?
- How can I access the people I need?

## 6. What potential risks could occur?

- What risks can I identify within my planning?
- How could I reduce risks from occurring?
- What will I do to keep myself and my participants safe?
- What will I do to ensure my participant's data is stored safely and securely?

## 8. What will I do with my insights?

- How will I present my insights?
- Who will I share my insights with?
- What information will I share about my participants?
- How will I measure the impact of my work?

For a blank version of this Qualitative Insight Plan that you can use to respond to the questions above, see Appendix 1 in our 'Section 1 Templates: Planning Your Approach' document here:

<https://www.wirralintelligenceservice.org/local-voice/qualitative-insight-toolkit/>

## Looking for more information on the Qualitative Insight Toolkit?

This guidance is the first of five toolkit sections in the Qualitative Insight Toolkit. The five sections of the toolkit are:

1. Planning Your Approach
2. Gathering Qualitative Insight
3. Bringing Your Findings Together
4. Presenting and Sharing Your Findings
5. Reflecting on Your Work

To access the full toolkit guidance, toolkit templates that you can print and use, or guidance and templates for the specific sections above, see:

<https://www.wirralintelligenceservice.org/local-voice/qualitative-insight-toolkit/>

### Contact

If you have questions or feedback about this resource, please email the Qualitative Insight Team at [qualitativeinsightteam@wirral.gov.uk](mailto:qualitativeinsightteam@wirral.gov.uk).

### About us

Qualitative Insight is a type of research that listens to people to gather their thoughts, experiences, and ideas on particular subjects. The Qualitative Insight Team at Wirral Council work with residents to ensure that their voices are heard when informing council policy and decision making. The team supports the delivery of the Health and Wellbeing strategy, in which residents' voices are a key strand.

### Acknowledgements

The Qualitative Insight Toolkit has been designed by the Qualitative Insight Team, Public Health, Wirral Borough Council.

<https://www.wirralintelligenceservice.org/local-voice/qualitative-insight-toolkit/>

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