Category

Consulting

Interview- and Workshop-Based Data Gathering Playbook

A practical method for designing, running, and synthesizing stakeholder interviews and workshops so qualitative data gathering produces evidence, not just anecdotes.

- Practitioner
- Intermediate
- Workshop Ready

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- 8 minute(s)

Overview

Design interview guides, run structured workshops, and synthesize qualitative input with a repeatable coding method, so stakeholder data gathering produces defensible findings, not a pile of quotes.

How many interviews are actually enough?

There's no universal number, but a useful rule of thumb is to keep interviewing within a stakeholder segment until you stop hearing new themes — typically 12-20 interviews across a mixed sample surfaces the major themes for most organizational or strategic questions, with diminishing returns after that unless you're deliberately expanding into a new segment.

Should interview notes be verbatim or summarized?

Take notes as close to verbatim as possible during the session, especially for direct quotes that might later illustrate a finding, but code and synthesize them into summarized themes afterward. Verbatim notes protect you from misremembering nuance; summarized coding is what makes cross-interview patterns visible.

How do we stop one dominant stakeholder from skewing a workshop?

Use structured formats — silent brainwriting before discussion, anonymous dot-voting, and small breakout groups reporting back — rather than open floor discussion, since these formats surface every participant's input before social dynamics can suppress it. If one person still dominates verbally, the facilitator should explicitly invite quieter participants by

name rather than waiting for volunteers.

What's the difference between a theme and a finding in the synthesis?

A theme is a recurring topic that shows up across coded input; it becomes a finding once you've checked corroboration — how many independent sources raised it, and whether any contradicted it — and can state it with a confidence level. Presenting a single articulate quote as a finding without checking corroboration is the most common synthesis mistake.

Can this method be used for external customer interviews as well as internal stakeholders?

Yes, the same sampling, guide, and coding discipline applies — the main adjustment is that the sampling plan should be built around customer segments (size, tenure, usage pattern) rather than internal seniority and function, and incentives or scheduling logistics for external participants typically need more lead time.

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