

## Resource sheet: getting the most out of discovery conversations

### Here is a step-by-step guide to undertaking discovery work with patients

- 1. Be prepared.** The work you do in advance of your interview day will set you up for success. Here are some tips:
  - If you are doing outreach work in a primary care setting, you want ideally to speak to both staff and people who use services on the same day. Contact the organisation well in advance so that they can make sure staff are available to speak to you (even ask if you can schedule appointments to speak to key people who are likely to be busy)
  - When you arrive, brief the staff who speak to people and families. Ask them to let people know you are around today and would like to speak to them if they are willing. Have a sign as well that lets people know you are there on the reception desk or a poster to put on the wall
  - Make sure you have a private space/room to talk to people – especially if you are recording interviews
  - Buddy up and go to health care locations with a colleague; perhaps a team of one female and one male colleague in case people have a preference about speaking to a male or female ELC Practitioner
  - Be able to offer people options. Some people might want to be interviewed; others might prefer a questionnaire they fill out themselves. Have a number of different ways people can contribute
  - Have a pre-packed bag and a checklist of equipment and stationery you need to take with you. It should include:
    - Your name badge and pass confirming you have permission to be on the premises
    - Information sheet, explaining the programme, what will happen next and setting out details of any upcoming group events and contact details in case they want to get in touch (the person takes this away, so you need lots of copies)
    - Consent form, giving permission to use the information generated; include video and audio recording in case it is needed. You keep a signed copy. The person needs a copy too
    - Thank you cards
    - Pens (at least 2)
    - Tissues
    - Ink stamp (for people who use their finger print as a signature)
    - Video or audio recording equipment; power cable and source of power for equipment (spare batteries; power socket)
    - A timekeeping device (watch or phone)
    - Your field notebook

Keep the pre-packed bag with all the equipment so that you can 'grab and go'. Top it up after each discovery session so that it is ready for the next time

2. **Engage with the person.** Often you will be approaching people cold in a health or care setting. Approach in a friendly way. Introduce yourself. Describe the purpose of the discovery work verbally. Provide an information sheet for those who want something to read. Explain what will happen if the person chooses to participate and explain how long it will take. If they agree to participate, proceed
3. **Gain consent.** In your country, there is Data Protection Legislation governing the collection, retention, and transmission of information about individuals and the rights of those individuals to see information held about them. The ELC team will work with you to make sure you have a complaint consent process and paperwork. It should include people consenting being filmed or audio recorded and describe how any film produced may be used in the future
4. **Check video or audio equipment.** Audio or video recording ensure that you can accurately transcribe the data you collect and are both more effective than the ELC Practitioner taking notes alone. Filming also means you can create a trigger film to communicate the key findings. The more an accurate record of the stories you hear, the more you enable analysts to identify important experiences, emotions, and insights of the person's journey through the health care process. If you are using video, the camera needs to be positioned in the best place to record the interviewee's voice and face, even if it appears to be prominent. The camera is usually quickly forgotten once people start telling their story. Whether you are using audio or video equipment, make sure the device is charged or plugged in. Once you are deep in conversation, you may not notice if the video stops!
5. **Invite the person to share their story.** Your job is to enable the person to tell you their story in their own words. Stay quiet when they are talking. Avoid interruption and talking over the person. It makes the recording unclear as well as making their story seem unimportant. Provide lots of non-verbal encouragement to them to continue such as nodding your head and smiling. If the person is keen on a particular topic or issue, let them stay with it so that the conversation is led by what matters to that individual
6. **Prompt the person to share more and focus on emotions.** Ask follow up questions and use prompts to probe further when you hear something surprising or the person is talking mainly about what happened rather than how they felt at that point e.g. "how did that make you feel, tell me more about that.." If the person does not mention touch points spontaneously, prompt people to talk about the emotional touch points in your framework so these are covered
7. **Ask open questions.** Keep questions to a minimum and encourage the patient/carer to expand their story where appropriate. When you ask

questions, make sure they are open questions, such as “how did you feel?” rather than closed questions which tend to be answered with “yes” or “no”

8. **Listen deeply and record the person’s own words.** use active listening skills to encourage the patient/carer to continue their story
9. **Be aware of body language.** Keep your body language open and positive
10. **Give people space when they become emotional.** People often describe participating in ELC work as therapy as it provides space to process their experiences and heal from them – especially if they have had difficult experiences. Some people will often become emotional as they recall past experiences, especially as we are asking them to talk about how they felt. If someone becomes emotional, let them know they are in a safe space through your verbal and non-verbal language. Give them space and let them know you support them. Have tissues on hand and offer them. Check in if they are happy to continue and continue at their pace. Thank them for sharing their story and recognise how important it is to them and how sharing it will help others through this work
11. **Respond to communication styles.** As we have learnt from the communication styles insights, some people like to reflect (green and blue style). Others make sense of the world by discussing and making sense of their experiences through interaction with you (yellow). Others may respond quickly and will be focused on completing the task (red). Adapt your interview style to the communication preferences of the person you are working with
12. **Embrace silence.** Those who like to reflect with need space to recall and describe their experiences and feelings. Remember, when silence already feels uncomfortable for you, the person will not yet have noticed the silence. Watch their body language and give them as much space as possible
13. **Remain objective.** Be mindful of your own life experiences and pre-conceptions. Avoid value judgements about what you are hearing
14. **Make field notes.** Always have a field notebook with you, note times when you feel you are less objective to support reflective practice and improvement. After each interaction with a person, note:
  - Potential codes and surprising findings so you can discuss them with analysts later
  - Emerging touchpoints and issues that you feel you need to explore further with future people you talk to
  - Times when you recognise you are struggling to remain objective

- What worked well about that conversation and things you will do better next time

15. **Manage time and be flexible.** As an ELC Practitioner, you are constantly balancing the person being keen on a particular topic or issue, letting them stay with it so that the conversation is led by what matters to them and respecting their time and contribution. Interviews that include story telling usually take around 45 minutes to complete. Working through an emotional mapping questionnaire with individuals or in a group can be quicker. As the conversation progresses, keep a check on how time is progressing. If time is moving on and taking longer than you described when you engaged with the person, check that they are OK to continue and let them know when you expect to finish. Steer the interview to a natural close
16. **Thank the participant.** Thank the person for their time and for sharing their story with you
17. **Share next steps.** As we have learnt, it is essential to the integrity of the ELC process that we feedback and add people who share their story during discovery to our stakeholder map. Explain to the person what will happen next and as appropriate, invite them to scheduled group workshops
18. **Check in with the person.** Ensure that the person feels OK before they leave – especially if they became emotional. Close the interview positively. Remind them that they have contact details on the information sheet in case they need to follow anything up.