**Research Project title**

**Discussion & Facilitator Guide**

**Document purpose**

This discussion guide has been developed to (blank). As part of every round of research, we develop a discussion guide to help facilitate the interviews and ensure both parties understand the purpose of the research sessions, and the manner in which the sessions will be undertaken. Because every participant is different, every session will be slightly different as well. While we aim to keep the course of all interviews approximately the same, sometimes the facilitator may need to stray from the prescribed script where they feel it’s appropriate.

**Session Outline**

Example

*The approach for the session will be qualitative individual interviews (or ‘contextual enquiries’) held in the participants home. Each interview will be 60 mins and have the following basic structure:*

**Artefact checklist**

1. Note taking templates + Discussion guide
2. Pens, sharpies and blank paper
3. Session schedule, Video conference link and calendar invite (participants & observers)

**Facilitator checklist**

The following items are used as a checklist to ensure the participant has been briefed correctly prior to the session.

1. Introduce yourself and the observer/notetaker and what they do
2. Ensure participant is comfortable, thank them for their time
3. Briefly explain session duration (1 hour) and session format (questions & tasks)
4. Encourage them to be themselves and be honest, everything is confidential and we want to hear what they really think
5. Free to leave at any stage, and ask questions at any stage
6. Recording and photography permission, start recording, start timer

**Research Consent Form**

We are conducting research about how we might [insert HMW statement here]. We are talking to people to better understand their experience and explore how we might design solutions that provide them [outcome part/ so that of your HMW statement].

We will ask your permission to record the information you share with us at the beginning of the session, and confirm your permission again at the end of the session. You can withdraw this permission at any time.

Please circle the option appropriate to your decision:

I (name) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ consent to **take part in research** conducted by Monash University Entrepreneurship students.

**YES / NO**

I give Monash University Entrepreneurship students permission to:

* **Record the research session** in audio, video, and/or photographic format for analysis and training purposes.

**YES / NO**

* **Add the recordings to our research repository,** in an anonymised format, to be accessed by us during the semester, to maximise the usefulness of the research and reduce duplication of research done by our team.

**YES / NO**

Signed \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date\_\_\_\_\_\_\_\_\_\_\_\_

*(Participant / participant’s representative)*

**Research objectives**

***Example***

1. *To identify people’s behaviours regarding bill management and payment*
2. *To determine key opportunities and frustrations across their bill management journey*

**Discussion Guide**

***Example***

**Introduction – 5 mins**

We’re designers and we’re looking into bill payment frustrations. Do you have any questions before we start?

1. Tell me about yourself and your current billing situation  
   *What does your bill payment process look like?   
   What kinds of bills are you paying for?*

**Understanding billing – 10 mins**

1. From your perspective, who are the most important people to talk to in tackling this problem?

*Why are they the key? What is it about them/their role that makes them an integral part*

*What support/tools/systems have you seen be effective in equipping these people?*

1. Can you share your most recent challenge with billing? Talk us through this situation.

*What were the steps you had to go through? What made them hard?   
Was there anything that helped you better engage?*

**Next section title – [X] mins**

1. Questions & probing points
2. Questions & probing points
3. Questions & probing points

**Wrap up**

Do you have any further comments or questions about anything we’ve done today?