

# **Practical guide for conducting qualitative interviews**

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# Quality Management

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## Icons

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# Practical guide for conducting qualitative interviews

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## Summary

This practical guide provides an overview of **conducting interviews** to collect qualitative information **in the context of public policy design and evaluation of social programs**. Success of these activities depends mainly on planning, the performance of the moderator, and the careful storage of the information obtained. This guide presents i) a definition of the technique and types of qualitative data collection, ii) the purpose of collecting information, iii) recommendations and steps to follow to apply the collection technique, and iv) applications of the technique in virtual contexts.

### This document is the product of:

1. The **experience** of a multidisciplinary team implementing mixed and qualitative methods from several country offices and units from Innovations for Poverty Action (IPA).
2. The best practices for implementing qualitative collection techniques available in the literature.
3. The **expertise** of María Cecilia Dedios, who advised on the relevance of the contents with recent advances in the literature.

# Table of Contents

<b>1. What are interviews?</b>	
<b>2. What kind of information is obtained?</b>	
3.1 Structure your team	10
3.2 Know the desirable skills of the field team	
3.3 How to be an effective interviewer	
3.4 Plan logistics activities	
3.4 Study the script	10
<b>4. What to do during and after the interview?</b>	11
4.1 During the interview	11
4.1.2 Possible challenges	12
4.1.3 Possible errors to avoid	14
4.2 After the interview	14
<b>Considerations in remote interviews</b>	15
<b>References</b>	16

# Interviews

## 1. What are interviews?

An interview is a **qualitative method of gathering information through a formal dialogue between two people**—the interviewer and the interviewee—guided by a specific research goal. Unlike conventional conversations, which involve symmetrical communication and relationship (with no person guiding the conversation) between the interlocutors<sup>1</sup>. A qualitative interview is based on a structured approach. In this setting, the interviewee permits the interviewer to direct the conversation, and guide the dialogue in accordance with the objectives of the study. The interviewee thus becomes the primary source of information<sup>2</sup>.

This collection method **is characterized by its flexibility**. While there is script or a list of specific topics to investigate, the interviewer may follow emerging topics or delve deeper into particular aspects according to the interviewee's answers.

**The structure of this data collection technique can vary widely.** At one end of the spectrum are highly structured interviews, which follow a defined sequence of topics and number of questions. At the other end are semi-structured interviews, where the moderator intuitively delves into the topics of interest<sup>3</sup>. The structure of the interview is influenced by the research objectives and the type of data to be obtained.

## 2. What type of information is obtained?

In-depth interviews help to learn about **the interviewees' feelings, opinions, perspectives, beliefs, and experiences**. The interviewees express themselves in their own words and in an active way, pointing out their point of view on the issues raised by the interviewer.

This collection method is appropriate for discussing complex or sensitive topics that some people may be reluctant to discuss in a group setting<sup>4</sup>. Qualitative interviews provide unique insights from participants' experiences and knowledge, translated into detailed narratives and descriptions that reveal how people interpret their experiences and the world around them.

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<sup>1</sup> Adela Ruiz, "Entrevista cualitativa: la conversación como forma de acceso al conocimiento" (communication presented at the II Jornada de Investigación en Disciplinas Artísticas y Proyectuales), <http://sedici.unlp.edu.ar/handle/10915/39236>.

<sup>2</sup> Raúl López and Jean-Pierre Deslauriers, "The qualitative interview as a means of research in Social Work," *Márgen*, No. 61 (2011).

<sup>3</sup> Frances Ryan, Michael Coughlan y Patricia Cronin, "Interviewing in qualitative research: The one-to-one interview," *International Journal of Therapy and Rehabilitation* 16, (2009), <https://doi.org/10.12968/ijtr.2009.16.6.42433>

<sup>4</sup> Natasha Mack et al., "Module 3 In-Depth Interviews" in Qualitative Research Methods: A Data Collector's Field Guide (2005), 29-50

Qualitative interviews seek in-depth answers and the person's interpretive perspective<sup>5</sup>. In general, interviews have some advantages for certain profiles in contrast to focus groups such as:

- Experts in different fields
- Populations that experienced traumatic events
- Persons deprived of liberty
- Geographically dispersed populations
- People with disabilities

## How to prepare?

Proper preparation is essential for the success of an interview, ensuring that the research activity meets its field data collection objectives. This section provides detailed guidance on the planning steps that should be undertaken before conducting an interview.

### 3.1 Structure your team

#### When you should not have a facilitator?

When an interview involves sensitive or personal issues, such as when the interviewee is hesitant to share intimate details, the interviewer's approach can significantly impact the conversation. For example, if a facilitator does not value the importance of mental health, this may become evident in how they take notes during an interview about traumatic experiences related to mental health.

During qualitative interviews, the fieldwork team is composed of a moderator and a facilitator. The facilitator's participation is crucial to support logistical and note-taking processes. While budget restrictions may sometimes require the moderator to work individually.

If you have a facilitator, it is important that you identify the functions they will perform.

### field team

### 3.2 Know the desirable skills of the

The quality of the data produced during qualitative research activities is related to the skills of the moderator and facilitator leading the activity while collecting information<sup>6</sup>. According to Small and Calarco, it is possible to identify specific competencies<sup>7</sup> (outlined in Table 1), which enable teams conducting qualitative data collection to recognize and adequately represent the diversity within qualitative data.

<sup>5</sup> The way in which a person interprets their life, their experience, and their world.

<sup>6</sup> Mário Luis Small and Jessica Calarco, Qualitative Literacy. A guide to evaluating ethnography and interview research (Oakland, 2022).

<sup>7</sup> Ibid.

The skills listed in Table 1 are typically developed, and strengthened through years of study and practice in qualitative methodologies. However, field teams often consist of individuals from multidisciplinary backgrounds with varying levels of experience in monitoring and evaluating social programs. Whether your team is highly experienced or new to qualitative data collection techniques, you should review and discuss these skills with your team to identify possible gaps and opportunities for improvement.

Currently, there are no standardized metrics to measure the prevalence of these skills among qualitative fieldwork moderators. Therefore, the skills in Table 1 should be viewed as a resource for reference and reflection for teams.

It's essential to ensure that everyone on the team, regardless of their experience level, understands how these competencies contribute to effectively engaging with the population and reflects on their abilities to collect high-quality information.

**Table 1: Desirable skills in the field team**

Ability	Description	Why is this skill important?
<b>Cognitive empathy</b>	The field team's ability to understand and communicate participants' situations from their perspectives, understanding how they see the world and their roles within it.	<ul style="list-style-type: none"> <li>Allows researchers to connect more deeply with participant's realities and experiences.</li> <li>Helps to create a relationship of trust and respect with the participants.</li> <li>Seeks to avoid generalizations and stereotypes that may arise from preconceptions or external influences such as previous studies.</li> <li>Enhances understanding of participants' situations without resorting to pity.</li> </ul>
<b>Follow-up</b>	The field team's ability to recognize when additional information is needed to answer the questions initially posed and those that arise during the research process. This ability implies curiosity and a willingness to explore new issues or doubts that emerge as data collection progresses.	<ul style="list-style-type: none"> <li>Increases the quality and robustness of data by allowing a more detailed exploration of the studied phenomenon.</li> <li>Contributes to obtaining deeper responses from participants.</li> <li>Enables exploration of emerging themes during data collection.</li> <li>Helps detect and validate patterns observed in the field.</li> </ul>
<b>Self-awareness</b>	The field team's ability to continuously	<ul style="list-style-type: none"> <li>Helps maintain ethics in the</li> </ul>

<b>and reflexivity</b>	reflect on how their presence, background, and assumptions influence data collection, interpretation, and analysis. This ongoing self-reflection ensures that the qualitative field team is mindful of its impact on the research process and the participants.	<p>researcher-participant relationship.</p> <ul style="list-style-type: none"> <li>Facilitates understanding of personal limitations in connecting with participants.</li> <li>Aids in developing strategies to overcome communication barriers and create an environment where participants feel comfortable sharing sensitive information.</li> </ul>
<b>Heterogeneity</b>	The field team's ability to represent and reflect the diversity within the group being studied. This skill involves recognizing and documenting the differences and variations among individuals or subgroups during qualitative research, typically applied during the data analysis phase.	<ul style="list-style-type: none"> <li>Contributes to challenging generalized and simplistic patterns.</li> <li>Ensures that data reflect both common and atypical experiences.</li> <li>Demonstrates the field team's ability to identify, recognize, and document heterogeneity in the population studied.</li> </ul>
<b>Palpability</b>	<p>The field team's ability to provide detailed descriptions in their field notes or diaries, making the data tangible and clear. This involves avoiding abstract descriptions and, instead, offering vivid accounts that allow the research team to visualize and understand participants' experiences and contexts.</p> <p>The palpable field notes and diaries are accompanied by textual quotations, images, or other audiovisual resources that show events, situations, and actors that support the research findings.</p>	<ul style="list-style-type: none"> <li>Reliable findings are supported by specific details that clearly depict the events and situations studied.</li> <li>Helps to avoid abstraction in the data, grounding conclusions in concrete evidence.</li> </ul>

These skills may seem abstract and complex. In the following section are described specific tasks that you can implement during data collection that will help you cultivate the skills described above.

### 3.3 How to be an effective interviewer

Moderation is a fundamental element in interviews. The interviewer guides the discussion and ensures the flow of the dialogue with the interviewee while focusing on the relevant issues.

An effective moderator not only facilitates a smooth and natural discussion but also creates an environment where the participant feels comfortable and safe expressing their opinions openly, without fear of criticism or judgment.

**Table 2: Interview moderation<sup>8</sup>**

Activity	Description	What skill does it relate to?
 <p><b>Provide for participants' well-being</b></p>	<ul style="list-style-type: none"> <li>Establishing a safe and comfortable environment for participants is essential. Prioritize the well-being of the interviewee and ensure that they feel respected and valued. At the same time, the interview environment and rhythm should be adapted to reduce stress or discomfort for the interviewee.</li> <li>Focus on using body language that promotes trust with the person you are interviewing.</li> </ul>	Cognitive empathy
 <p><b>Be empathetic</b></p>	<ul style="list-style-type: none"> <li>Express empathy during the interview. Understanding and validating the interviewee's emotions will help you create an atmosphere of openness and sincerity. Effective communication can help the interview to run smoothly.</li> <li>Express gratitude for the interviewee's time and openness. Phrases such as "Thank you for sharing that with me" or "I really appreciate your sincerity" can help create an atmosphere of trust.</li> <li>Align your facial expression and tone of voice with the interviewee's emotions. For example, if someone expresses sadness, show a sympathetic expression; if someone is excited, reflect enthusiasm.</li> </ul>	Cognitive empathy
 <p><b>Use few interruptions</b></p>	<ul style="list-style-type: none"> <li>Avoid interrupting the interviewee abruptly. Instead guide the conversation back if it strays. Remember that the main source of information is the interviewee, whose ideas establish the narrative order, even if there are already predetermined topics.</li> <li>This recommendation may have exceptions. If an interviewee goes on too long, changes the objective of the question abruptly, or wanders away from the questions posed, you can pick up the conversation with subtlety. One strategy is to repeat the last thing the interviewee said and use it as a preamble to a question. Another alternative is to ask more frequent counter-questions, encouraging the interviewee to close their ideas.</li> </ul>	Cognitive empathy and monitoring
 <p><b>Listen actively to the interviewee<sup>9</sup></b></p>	<ul style="list-style-type: none"> <li>Show interest and full attention when listening. This involves hearing what the interviewee says, thinking about why they say it, and observing their body language. Try to ask thoughtful questions.</li> <li>Frequently, paraphrase or summarize what the interviewee has said to confirm that you understood correctly, and if required elaborate further on the answer.</li> </ul>	Tracking and heterogeneity

<sup>8</sup> Steinar Kvale, "Conducting an interview". In *Doing Interviews*. 52-66.

<sup>9</sup> For more information on active listening techniques and practices, see the following recommended resources: [The LARA Method for Managing Tense Talks](#) and [Key Tips for Active Listening](#).

	<ul style="list-style-type: none"> <li>○💡 Maintain eye contact in a natural and relaxed manner. This shows that you focus on the person and what they say.</li> </ul>	
 <b>Avoid value judgments</b>	<ul style="list-style-type: none"> <li>● The interviewer position should be to inquire, remaining neutral. Avoid acting with judgment who can influence the interviewee's response. <ul style="list-style-type: none"> <li>○💡 It is important to avoid validating phrases such as "I agree with you." Instead, it is expected to look for neutral expressions that encourage deepening the dialogue, such as "I understand you" or "Could you elaborate further?"</li> </ul> </li> </ul>	Reflexivity
 <b>Train your memory</b>	<ul style="list-style-type: none"> <li>● Work on your ability to remember key details. This will allow you to make meaningful connections and counter-questions during the conversation, giving you more control and enriching the quality of the dialogue. <ul style="list-style-type: none"> <li>○💡 Take notes of keywords or events the interviewee narrates so you can return to these topics and paraphrase what is mentioned or ask counter-questions.</li> </ul> </li> </ul>	Follow-up
 <b>Use silences positively</b>	<ul style="list-style-type: none"> <li>● Learn to handle silences constructively. Silence can allow the interviewee time to think and respond deeply. <ul style="list-style-type: none"> <li>○💡 Avoid crutches. Resist the temptation to fill silence with unnecessary words like "umm" or "well." Let the interviewee take the initiative to speak when they are ready.</li> <li>○💡 Use silence breaks to review and take notes. This shows that you value the interview responses and gives them time to think without feeling constantly observed.</li> <li>○💡 Pay attention to the interviewee's nonverbal cues. If they seem to be thinking deeply, give them more time. You can offer a soft question or affirmation to restart the conversation if they look uncomfortable.</li> </ul> </li> </ul>	Follow-up

### 3.4 Plan logistics activities

Logistical activities play a crucial role in the success of interviews. Careful planning ensures that all necessary elements are in place to conduct interviews smoothly.

Based on our experience in qualitative field operations across various contexts, the IPA team has identified key practices that guide research teams in effective planning:

**Figure 1: Logistical activities for interviews<sup>10,11</sup>**

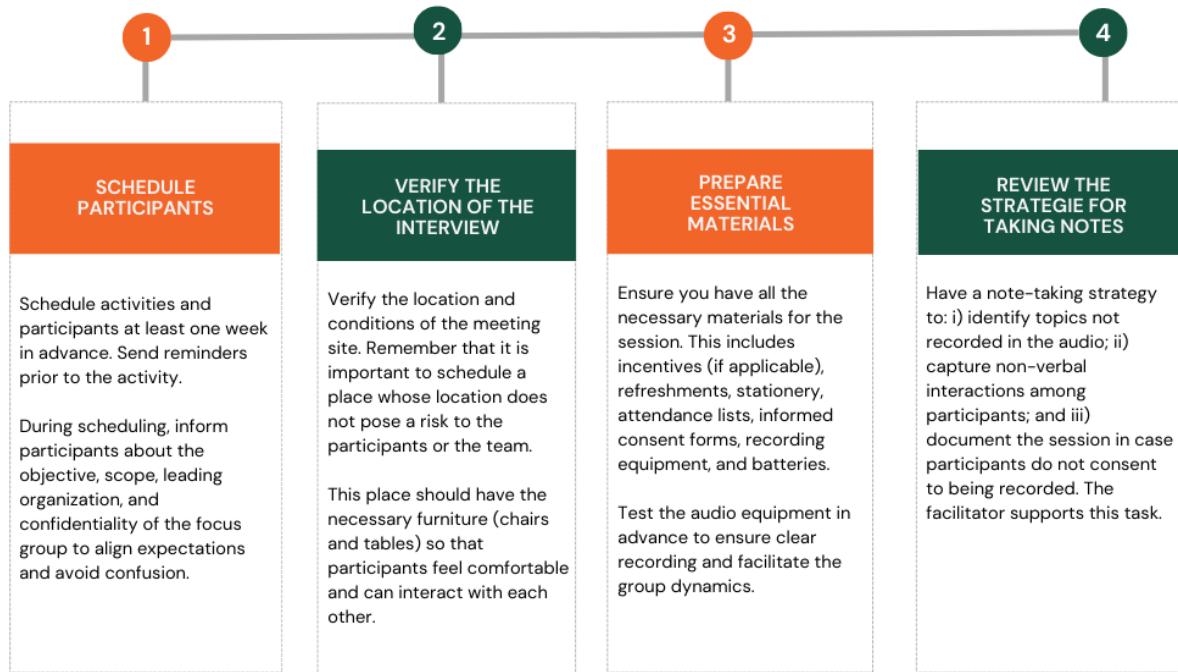


Figure 1 presents general activities that should happen before implementing interviews. However, this list could be more comprehensive based on the specific research needs of the field work. Ensure you cover all critical aspects to complete your research activities successfully.

### 3.4 Study the script

 **Remember:**

It is important to understand the research goals and main questions. It will allow you to go beyond the questionnaire and approach questions or dimensions of the problem that were not initially known.

Understanding the research questions is crucial for effective interviewing. The script is a guiding tool that helps keep the conversation within the research objectives. However, each dialogue is unique, so it's important to study the script thoroughly to adapt to the conversation's context without losing sight of the main topics.

During the script preparation, you should identify **the main questions** to address the research objectives and strategically **use follow-up and probing questions** to delve deeper into relevant issues<sup>12</sup>:

<sup>10</sup> It is recommended that field teams provide reminders to participants at different points in the schedule. These reminders can be through the mechanisms that best suit the needs of the participants, e.g. text messages, WhatsApp messages, calls, etc.

<sup>11</sup> Incentives in the case of focus groups and interviews are rewards or compensation offered to the people who participate in these studies to thank them for their time and effort. These incentives can be given in different ways: monetary, such as a cash payment of a fixed amount or the delivery of vouchers to be used in different stores or compensation for expenses incurred by the participants to attend.

<sup>12</sup> Herbert J. Rubin, and Irene S. Rubin. "Structure of the responsive interview." In Qualitative Interviewing (3rd ed.): The Art of Hearing Data, 3rd, 115-129. Thousand Oaks, CA: SAGE Publications, Inc, 2012.

- **Main questions:** These are the questions that guide the interview. They are defined beforehand and specified in the script.
- **Follow-up questions:** These are used to obtain more details and depth on specifics topics, concepts, or events mentioned by the person being interviewed.
  - *What do you think would happen if...?*
  - *Could you give me an example of...?*
  - *How did you decide to do it...?*
  - *How did you determine what was important...?*
  - *How did you conclude what you are telling me...?*
- **Probing questions:** They help validate what the participant is saying was understood and also encourage the dynamic flow throughout the conversation.
  - *Is this what you said...?*
  - *Did I understand you when you said...?*
  - *What is another way you could...?*
  - *Did I paraphrase accurately what you said?*

This will allow you to obtain the essential information directly related to the study's objectives and explore additional areas that can provide context and enrich the understanding of the data.

# 4. What to do during and after the interview?

## 4.1 During the interview

 Role of the facilitator in this phase	<ol style="list-style-type: none"><li>1. To begin the interview, <b>introduce yourself and explain the activity's objective and the session's dynamics.</b></li><li>2. <b>Read the informed consent form</b> and ensure that the interviewee understands the purpose of the activity, its confidentiality, and the potential risks and benefits of participating in it. Use simple words that the interviewee understands.</li><li>3. You should also emphasize the data security strategies that your organization and you as researcher, have in place to keep it confidential. This will help the interviewee feel confident that they can freely discuss their experiences and will be heard.</li><li>4. Throughout the activity, it is essential to <b>create a comfortable and calm atmosphere</b> that allows the interviewee's opinions to be spontaneous.</li></ol>
→ Ensure that recording equipment is working properly throughout the activity. → Ask counter-questions to the interviewee. → Verify that no relevant topics are left out. → Assist if the interviewee's emotions prevent them from continuing with the interview. For example, in actions such as offering a glass of water or proposing a pause. → Take notes of the entire activity, especially the interviewee's nonverbal reactions. → Support the moderator in time management.	

opinions to be spontaneous.

### 4.1.2 Possible challenges

*Table 4. Considerations and challenges in face-to-face interviews*

Challenges	Description	Possible solutions
Incomplete, superficial or monosyllabic responses	In some interviews, particularly at the beginning, the interviewee may be shy or inhibited, which prevents them from providing detailed and in-depth answers to the questions posed.  💡 To identify an incomplete or	<ul style="list-style-type: none"><li>• Invest time at the beginning of the activity to build rapport with the interviewee before addressing more in-depth questions. This initial trust may encourage fuller responses. You can use "icebreaker"<sup>13</sup> activities to do this.</li><li>• Ask open-ended questions that require a more elaborate response and prepare follow-up questions to provide more details on initial responses.</li></ul>

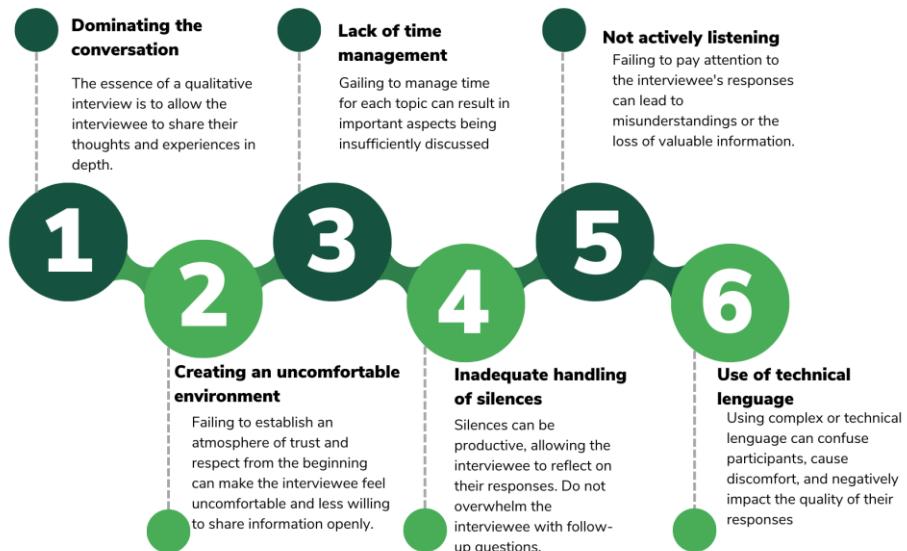
<sup>13</sup> An icebreaker activity is an exercise or game designed to help participants in a group get to know each other better, ease tensions, and promote a more open and friendly environment. Icebreaker activities can be an effective research method to kick off a session and engage participants in the objectives of the intervention. Here is a brief guide on how to use icebreaker activities and some examples: Icebreakers: an introductory activity

	<p>superficial response, you can look for aspects such as i) answers that are too general and do not provide specific details, ii) answers that are restricted to one or a few words, iii) haste in answering without going into detail.</p>	<ul style="list-style-type: none"> <li>• Politely ask for clarification by using counter-questions like "How did you feel about this?" or "What was your reaction when this happened?" to encourage more detailed answers.</li> <li>• Explain how your answers make a valuable contribution to the study or project.</li> <li>• Ask easy-to-understand questions in simple language and rephrase some if necessary.</li> </ul>
<b>Emotional overflow from participants</b>	<p>Participants may experience intense emotions during an interview, which can be challenging to manage due to the personal nature of discussions.</p>	<ul style="list-style-type: none"> <li>• Be empathetic and avoid abrupt changes in discussion topics during emotionally charged moments.</li> <li>• Allow participants to express their emotions while guiding the discussion constructively.</li> <li>• Offer the option to pause or continue based on the participant's comfort.</li> <li>• If emotions are overwhelming, take a short break and show support.</li> <li>• Provide relevant mental health care information as per research protocols.</li> <li>• Ensure the field team has training in psychological first aid if sensitive issues will be discussed.</li> </ul>
<b>Interviewee and interviewer fatigue</b>	<p>Fatigue can affect both the interviewee and interviewer, leading to a loss of concentration, energy, and quality in responses. This may result in missed questions or premature assumptions.</p>	<ul style="list-style-type: none"> <li>• Limit the interview length and be flexible with scheduling if you notice signs of fatigue.</li> <li>• Ensure the interview environment is comfortable, with good lighting and low noise.</li> <li>• Schedule breaks during the interview if necessary, or continue at another time if needed.</li> <li>• Consider active breaks or refreshments to help rejuvenate participants.</li> </ul>
<b>Deviation from the central theme</b>	<p>Conversations may deviate from the interview's objectives, requiring the moderator to tactfully redirect the discussion while balancing the exploration of valuable but off-topic insights.</p>	<ul style="list-style-type: none"> <li>• Direct the conversation subtly and without abruptly interrupting the interviewee to return to the main topic.</li> <li>• Establish clear objectives at the beginning. Before starting the interview, explain the objectives and topics to be covered so that the interviewee is clear about the necessary focus.</li> </ul>
<b>Hostile interviewee</b>	<p>An interviewee may dominate the conversation with aggressive or derogatory language, creating a tense atmosphere.</p>	<ul style="list-style-type: none"> <li>• Prepare some key concepts about the topic that can help you respond confidently to the interviewee's objections or challenges.</li> <li>• In the event of verbal or other kind of aggression, politely end the interview, thanking the participant for their time.</li> </ul>

### 4.1.3 Common mistakes

When conducting interviews, some mistakes should be avoided so that the research activity, objectives, and the integrity of the person being interviewed are protected. Some mistakes are described here:

*Figure 1: Common interviewing errors*



## 4.2 After the interview

The interview concludes when you, as the interviewer, determine that all the topics outlined in the script have been covered or if the interviewee indicates that the session should end due to time constraints or emotional reasons. To wrap up the working session, it is recommended to (i) **provide space for reflection** in which the interviewee can express comments, suggestions, or questions about the discussion; (ii) **express gratitude to the participants for their time and willingness to participate**, emphasizing the importance of their opinions and the information they provided to the study; (iii) **secure the data** by prioritizing the safe storage of the recording and notes from the session.

It is important to start working on the interview notes as soon as possible once it has been completed because if too much time passes between field activities and developing analysis, there is a risk of accumulating information and losing the opportunity to enrich the study research team insights.

### 4.2.1 Document Research Activities

At the end of the interview, it is important to document the information obtained in detail. How this documentation is done is a decision linked to the research design and is determined before fieldwork begins. Examples of products you can use for this purpose are i) full transcripts of the discussions, ii) detailed notes taken during the research activity, iii) field notes, and/or iv) field

diaries.

 Remember:	Information should be recorded promptly, as soon as the interview concludes, to prevent the loss of crucial details. This immediate action is vital to the research process. In addition, the products derived from the focus group must follow information storage protocols, which may include anonymization and encryption to avoid compromising the confidentiality of participants.
The lack of initial documentation products risks all information processing components and, thus, the quality of the data obtained.	



## 5. Considerations in remote interviews

Remote interviews (virtual via a digital platform such as meets, Zoom, or telephone) are an alternative when face-to-face interviews are not feasible due to distance, time, and budget constraints or when the interviewee prefers a remote setting. These **interviews are beneficial** for connecting participants from distant geographic locations or those who cannot attend in person, while also providing a safe and discreet environment. However, remote settings come with specific challenges that must be considered.

**Table 5. Considerations and challenges in virtual interviews**

Challenges	Description	Possible solutions
<b>Building trust and empathy</b>	In remote interviews it is often more difficult to establish trust.	<ul style="list-style-type: none"><li>Invest time in the initial conversation to establish a personal connection.</li><li>Be verbally expressive and attentive to compensate for the lack of more subtle nonverbal cues.</li><li>Avoid distractions that may be present</li><li>In the case of virtual interviews, ask the participant to use a camera during the activity.</li></ul>
<b>Connectivity problems</b>	Connectivity problems include situations that may cause people to wholly or partially interrupt their participation in the interview.	<ul style="list-style-type: none"><li>During the scheduling, validate the participants' connection difficulties; if they require it, make internet recharges. Avoid that the research activity generates connectivity costs for the participants.</li><li>If necessary, consider interviewing in person.</li></ul>
<b>Fatigue due to constant use of screens</b>	Fatigue associated with prolonged screen use or time on the phone can affect the	<ul style="list-style-type: none"><li>Plan breaks during lengthy interviews.</li><li>Limit the duration of each session to a reasonable time, approximately one (1) hour.</li></ul>

	concentration of both the interviewer and the interviewee.	<ul style="list-style-type: none"> <li>• Plan several sessions if necessary.</li> </ul>
<b>Users multitasking</b>	The person being interviewed may perform other tasks while participating (for example, preparing lunch or attending to someone else). This may affect their participation in the activity.	<ul style="list-style-type: none"> <li>• Suggest that the interviewee have their camera turned on.</li> <li>• During scheduling, remember that the interview is an activity that involves full attention to listening to others, and engagement with the questions.</li> </ul>
<b>Confidentiality</b>	Some interviewees may carry out the activity in spaces shared with family members and acquaintances. Depending on the sensitivity of the topics, this situation may place participants in uncomfortable or risky situations.	<ul style="list-style-type: none"> <li>• Advise interviewees on how to select an ideal space to have the interview.</li> <li>• Inform the participant when the recording starts, pauses or stops.</li> </ul>

This practical guide provides some tools to conduct qualitative fieldwork through interviews. However, it is essential to note that data collection is one of the first steps in the process. After data collection, a necessary process of analyzing the information collected follows. This analysis allows the results to be interpreted and understood in depth, facilitating the identification of patterns, themes, and meanings crucial for qualitative research.

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