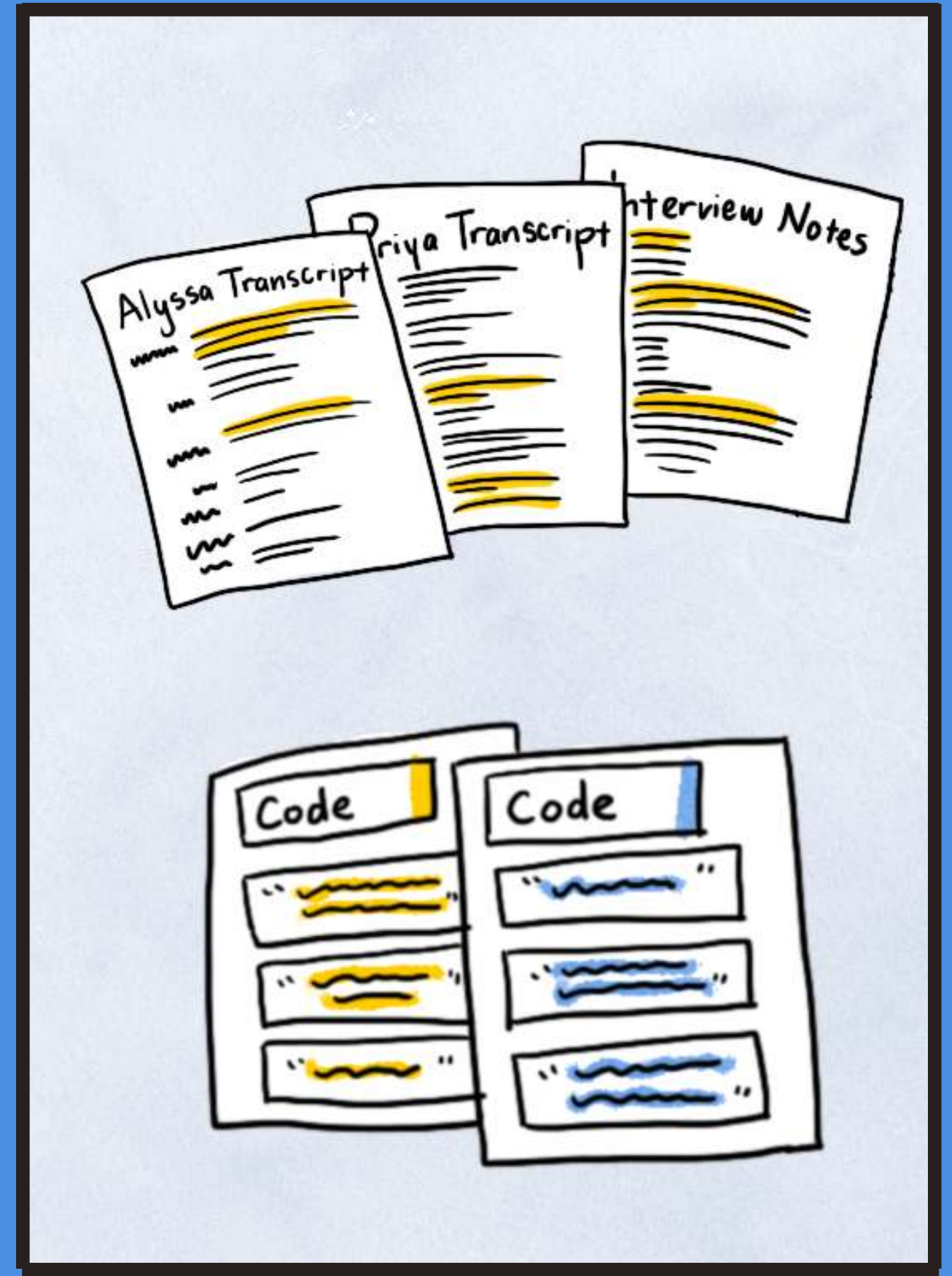


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Introduction to Qualitative Coding with Delve

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Agenda

- Introduction
- What is qualitative coding?
- Types of coding
- Step by step
- Tools for qualitative coding
- Q&A



Hi! I'm LaiYee.

I'm the co-founder of Delve,
online software for coding
qualitative data.

Email: laiyee@delvetool.com

Twitter: [@laiyeelori](https://twitter.com/laiyeelori)

LinkedIn: <https://www.linkedin.com/in/laiyee/>

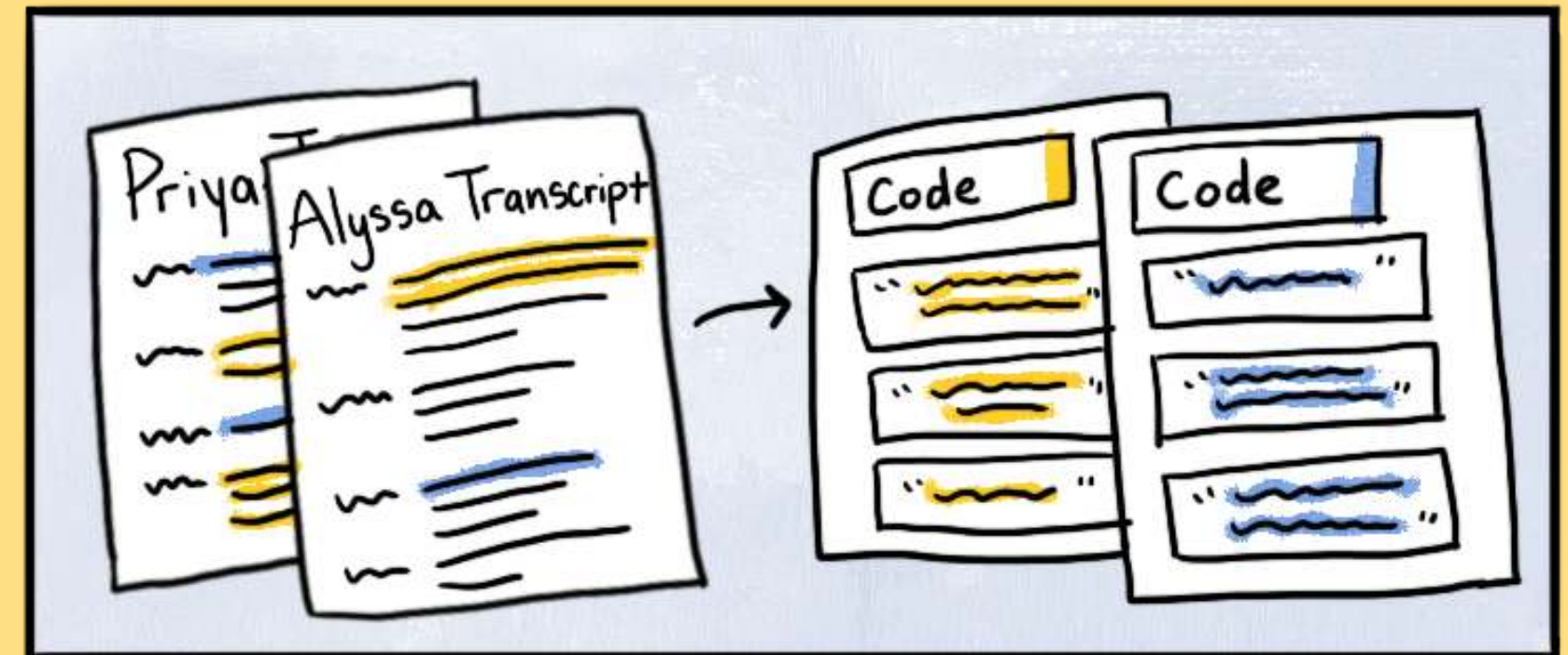
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Intro to Qualitative Coding

What is qualitative coding?

Qualitative coding is a process of taking unstructured data and systematically categorizing excerpts in order to find themes and patterns for analysis.

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In many cases, qualitative coding happens here:



Types of qualitative data

Transcriptions

Diary accounts

Documents

Case studies

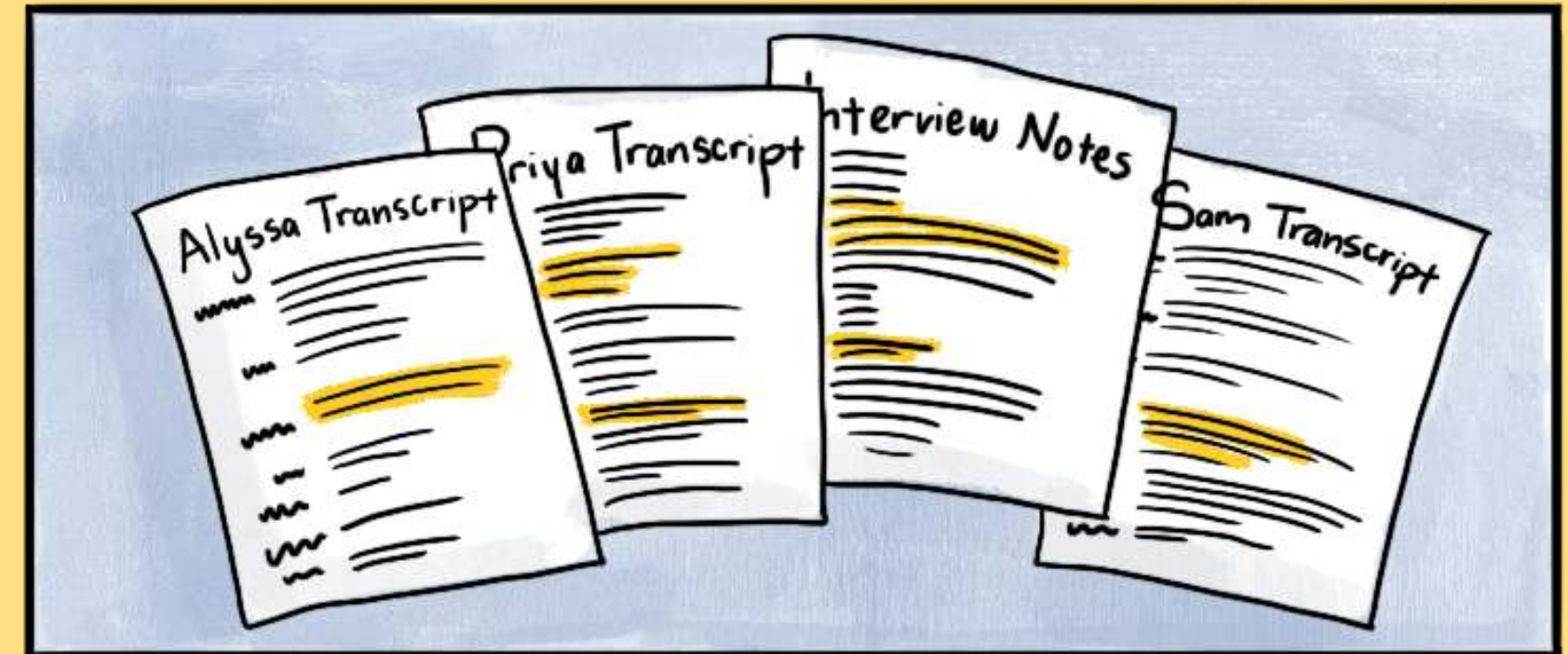
Audio recordings

Video recordings

Notes

Observations

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× × × ×



Types of qualitative data

Transcriptions

Diary accounts

Documents

Case studies

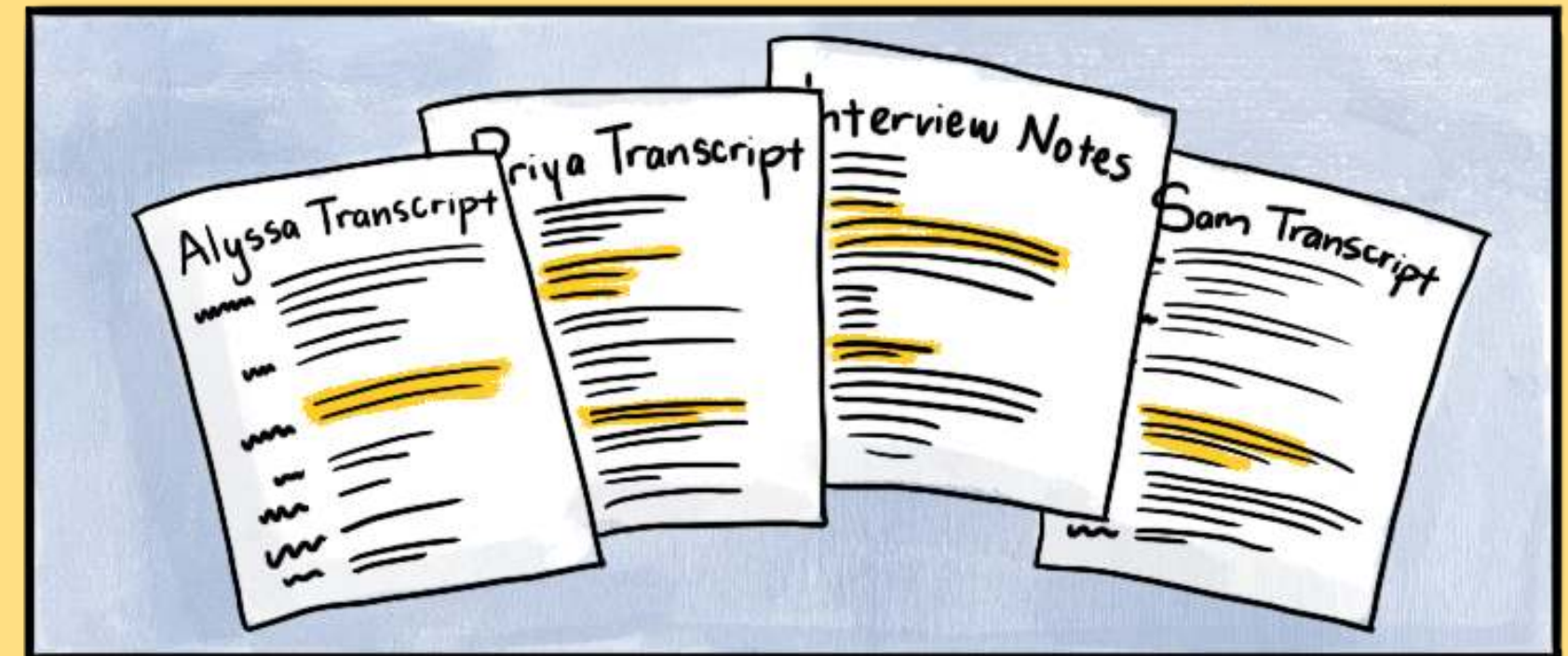
Audio recordings

Video recordings

Notes

Observations

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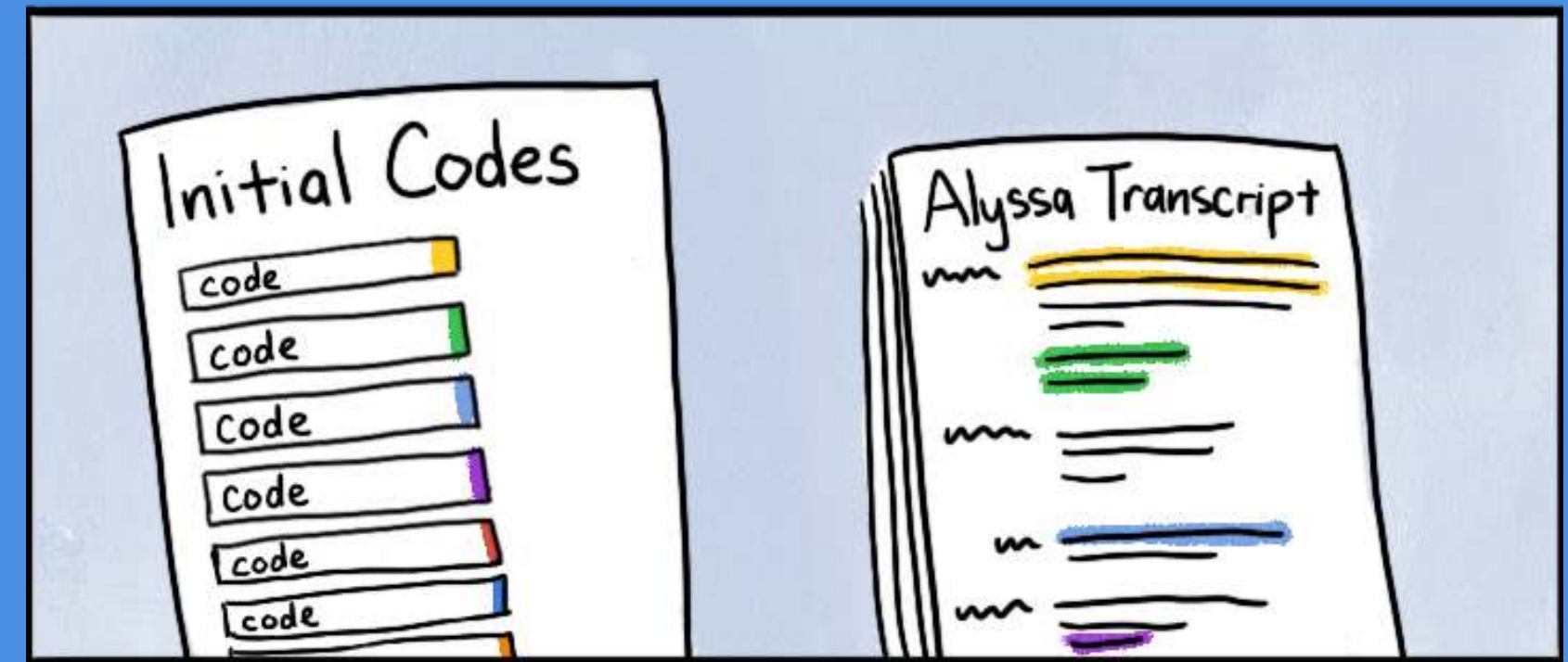


What is a code?

Codes are tags or labels that are assigned to excerpts of text.

They can be applied to paragraphs, sentences, phrases or words.

× × × ×
× × × ×



Coding example

"I wake up around 8, and I'll eat breakfast in the kitchen. I always make tea and eat yogurt and a banana while catching up on the news on my phone."

Coding example

"I wake up around 8, and I'll eat breakfast in the kitchen. I always make tea and eat yogurt and a banana while catching up on the news on my phone."

Breakfast routine

Benefits of qualitative coding

Be systematic and rigorous

Find quotes quickly

Find patterns and themes

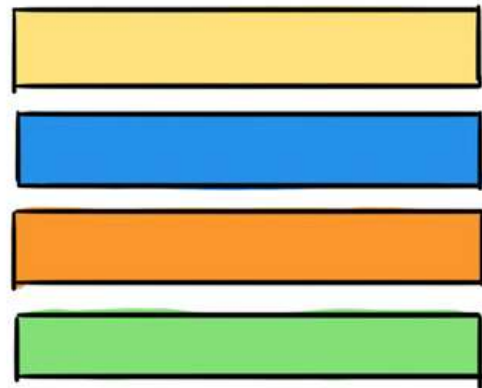
Check for biases

Types of Coding Processes

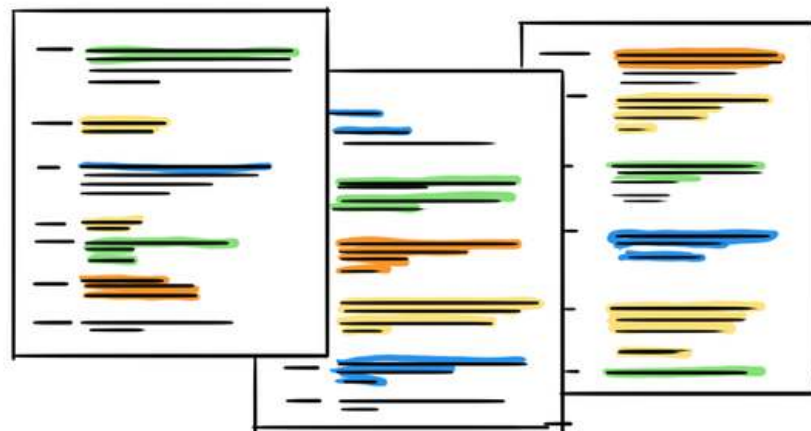
Deductive Coding

Inductive Coding

Start with codes



Find excerpts
that fit the codes

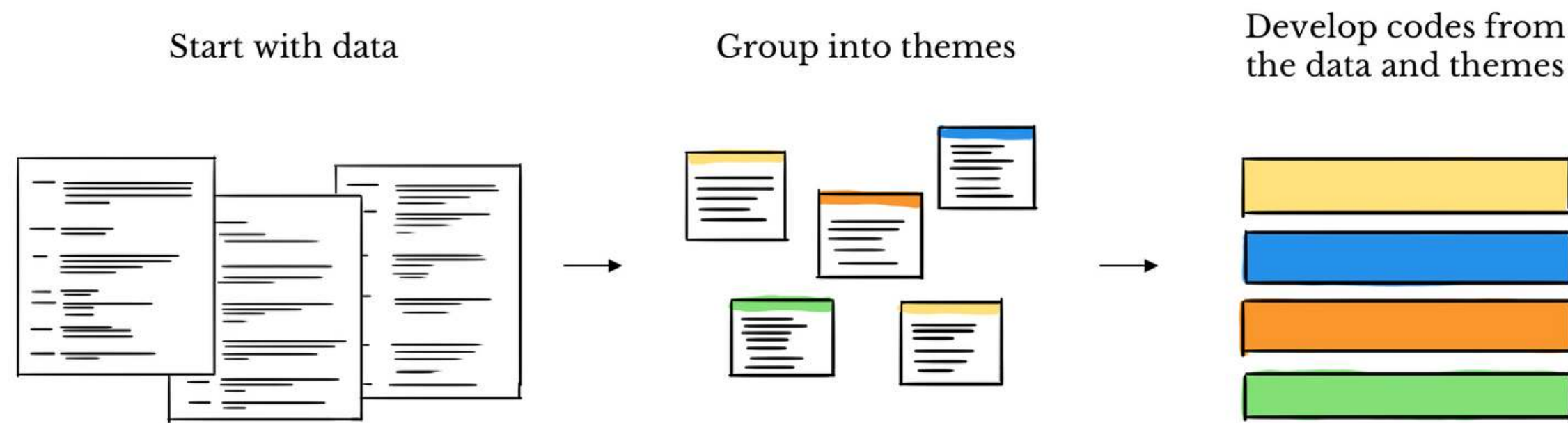


Deductive coding

- Top down approach
- Developing set of codes based on research questions or framework.
- Great for descriptive, structured, or evaluative research
- Examples: Structural coding, evaluating programs

Inductive coding

- Ground-up approach
 - Derive your codes from the data.
 - Don't start with preconceived notions of what the codes should be
 - Allow theory to emerge from data
- Great for discovery and exploratory methods of coding
 - Examples: Grounded theory, thematic analysis, exploratory research, coming up with new research framework

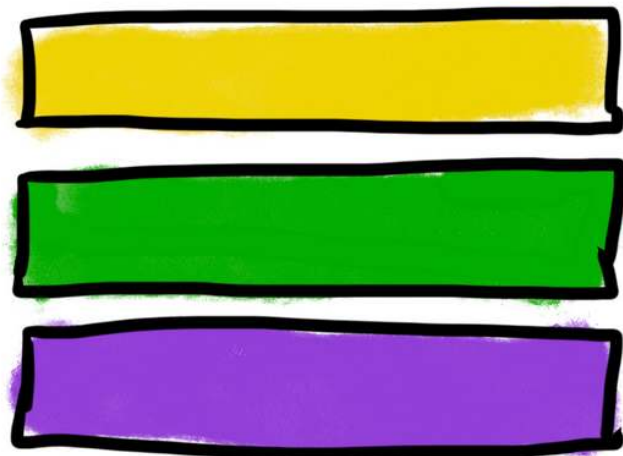


Step by Step

(A hybrid approach)

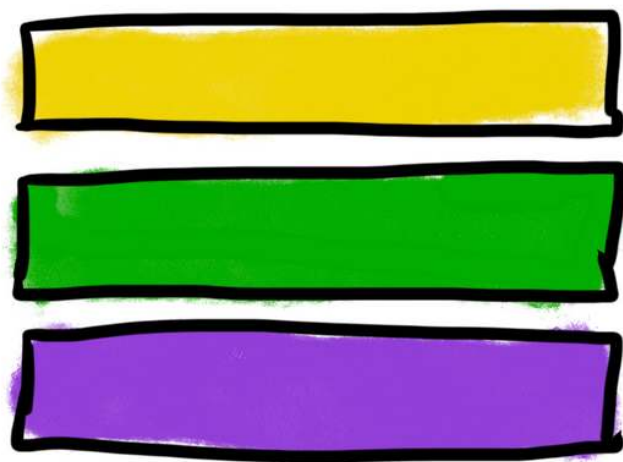
Steps for coding

1. Create initial codes



Steps for coding

2. Read through transcripts



Steps for coding

3. Decide what to code



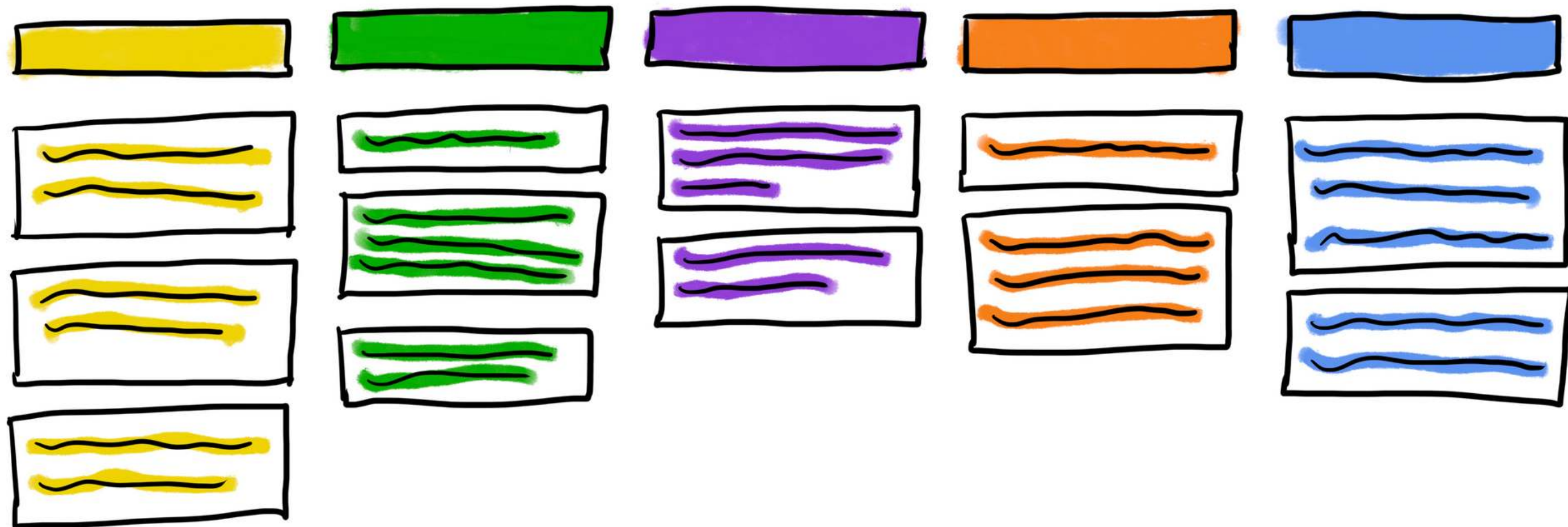
Steps for coding

3. Decide what to code and add new codes



Steps for coding

4. Collate codes with excerpts



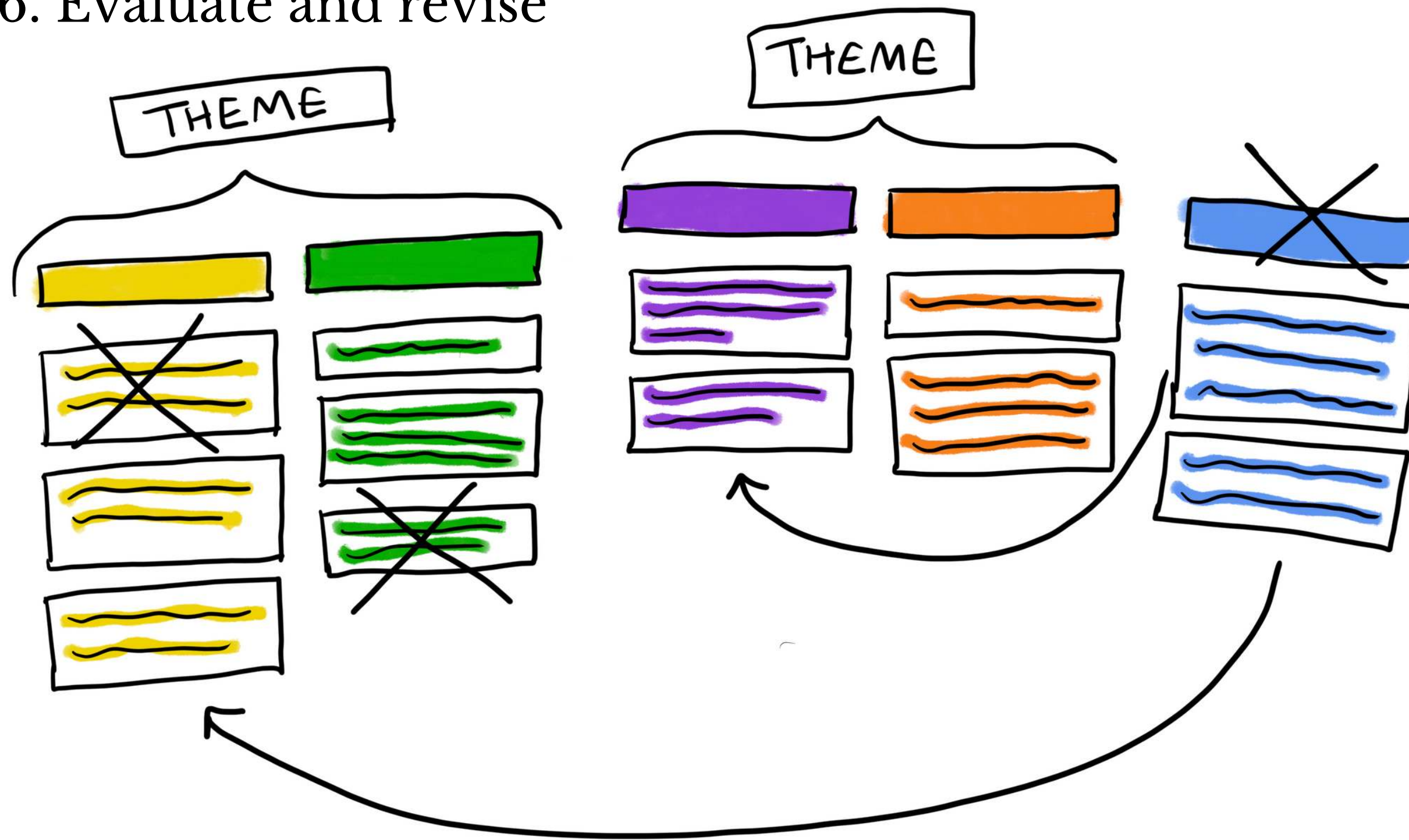
Steps for coding

5. Group codes into themes



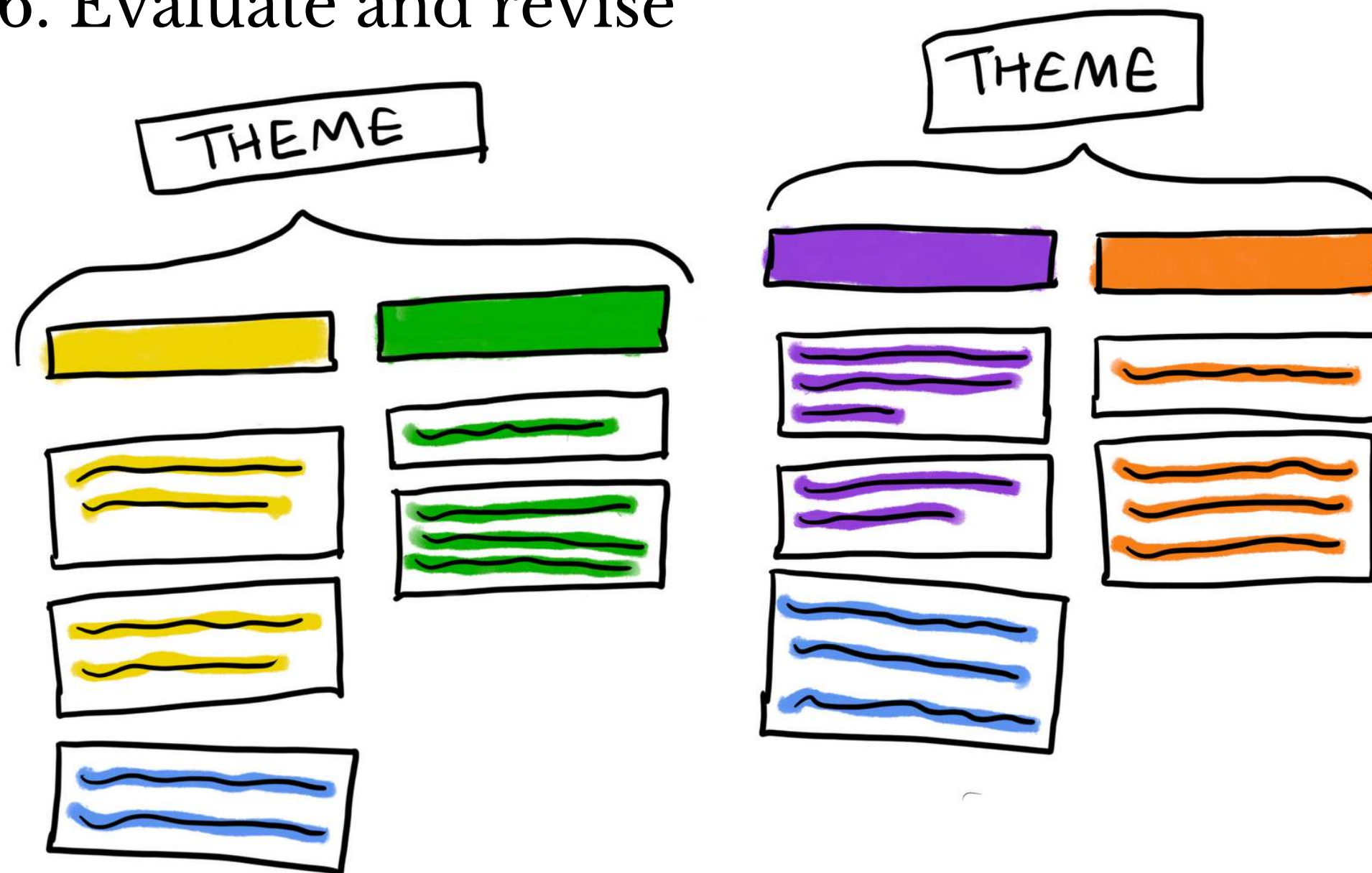
Steps for coding

6. Evaluate and revise



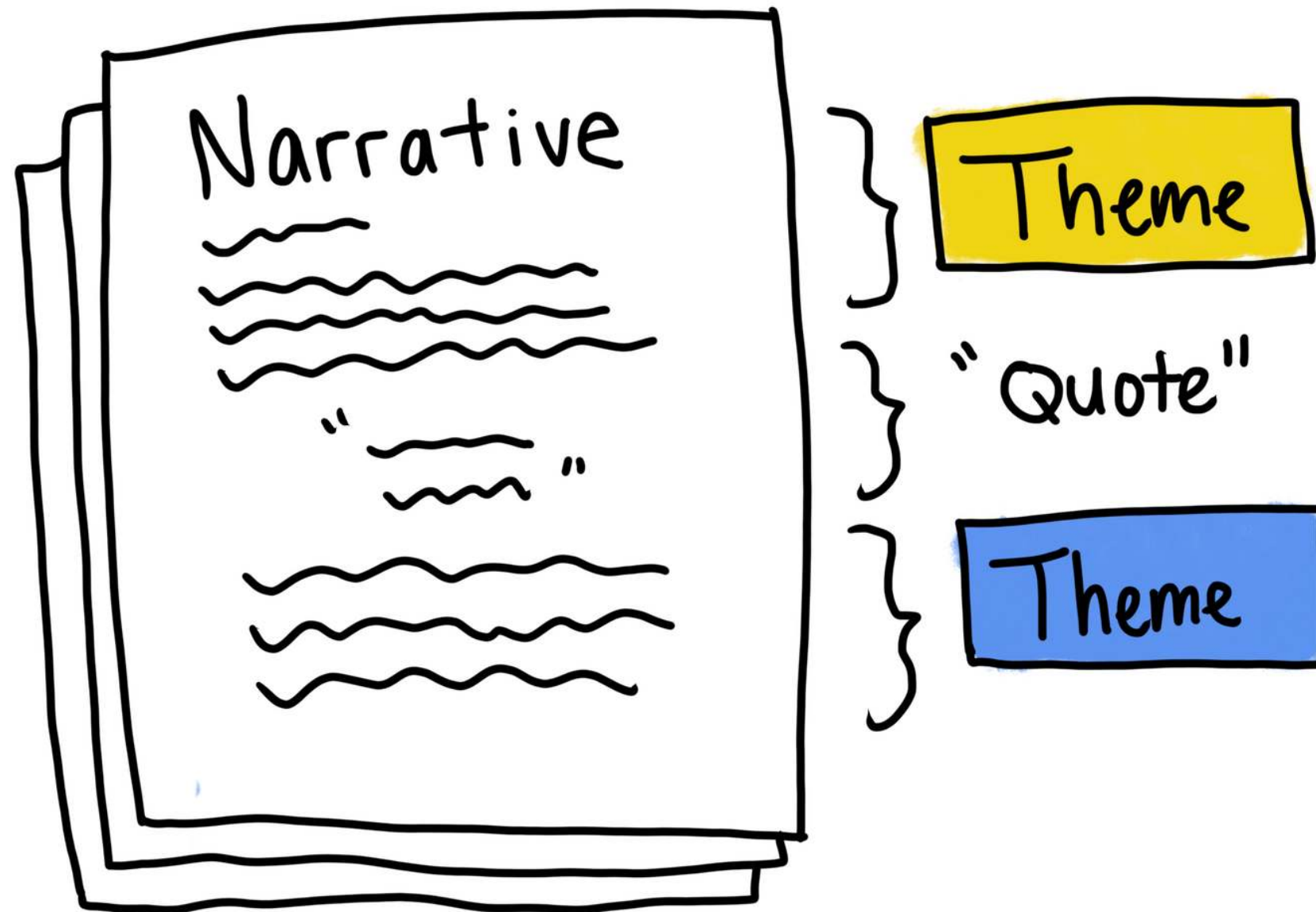
Steps for coding

6. Evaluate and revise



Steps for coding

7. Write your narrative



Deep dive into each step

Step 1

Create initial codes



Creating codes based on research questions

What **motivates** participants to start the weight loss program?



Motivations

What do they find **frustrating** about the process?



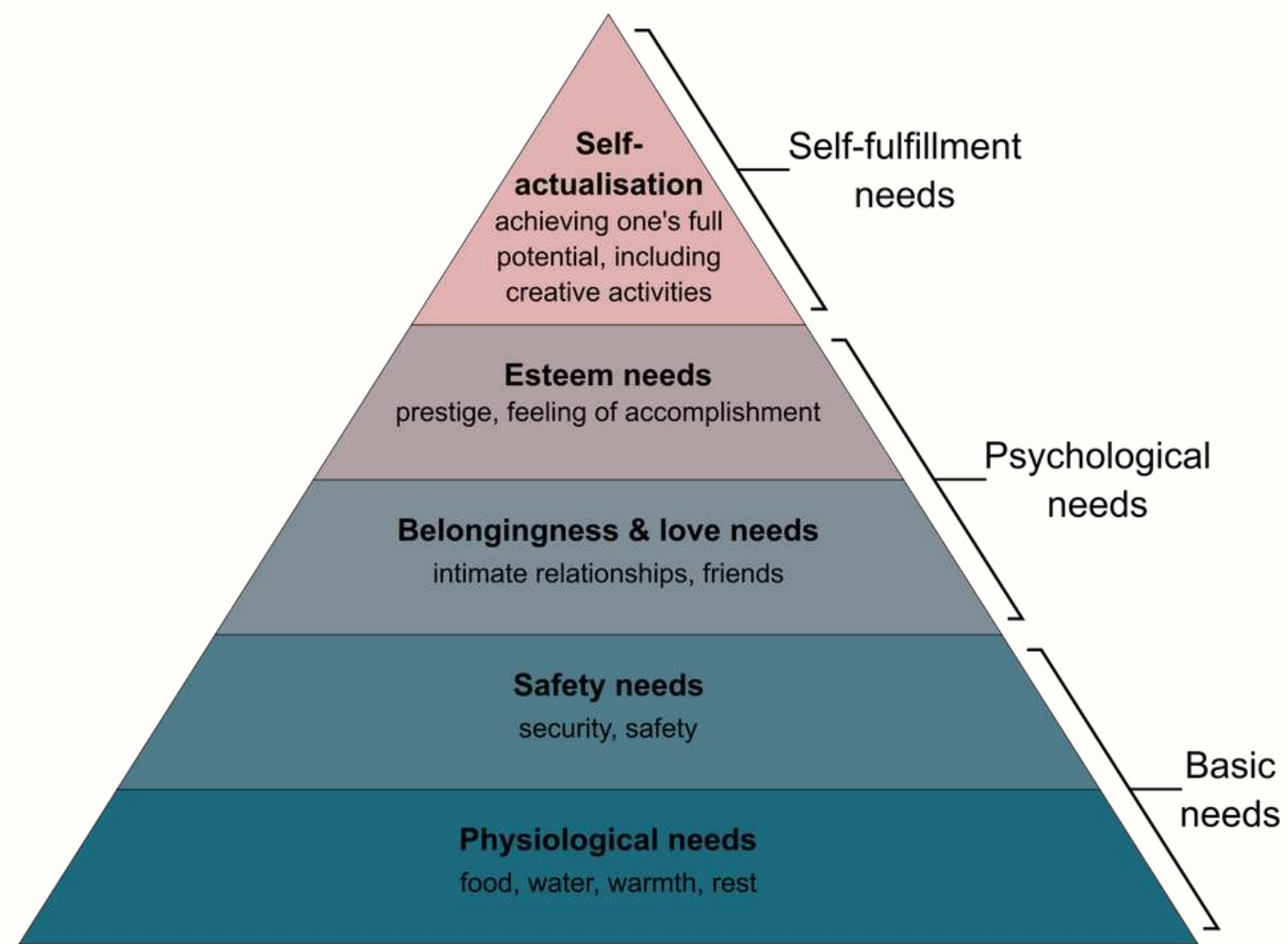
Frustrations

What **reactions** do they have to the new exercise regimines?



Reactions

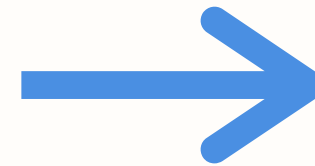
Creating codes based on an existing framework



Maslow's Hierarchy of Needs



Self fulfillment needs



Psychological needs



Basic needs

Keep track of codes in a codebook

Behaviors

Type of behaviors observed during research analysis

Examples: Re-reading transcript, keeping track of good quotes, looking for patterns

Collaborating

When groups of researchers collaborate on the same project together

Examples: Working together as a team, co-analysis with clients.

Motivations

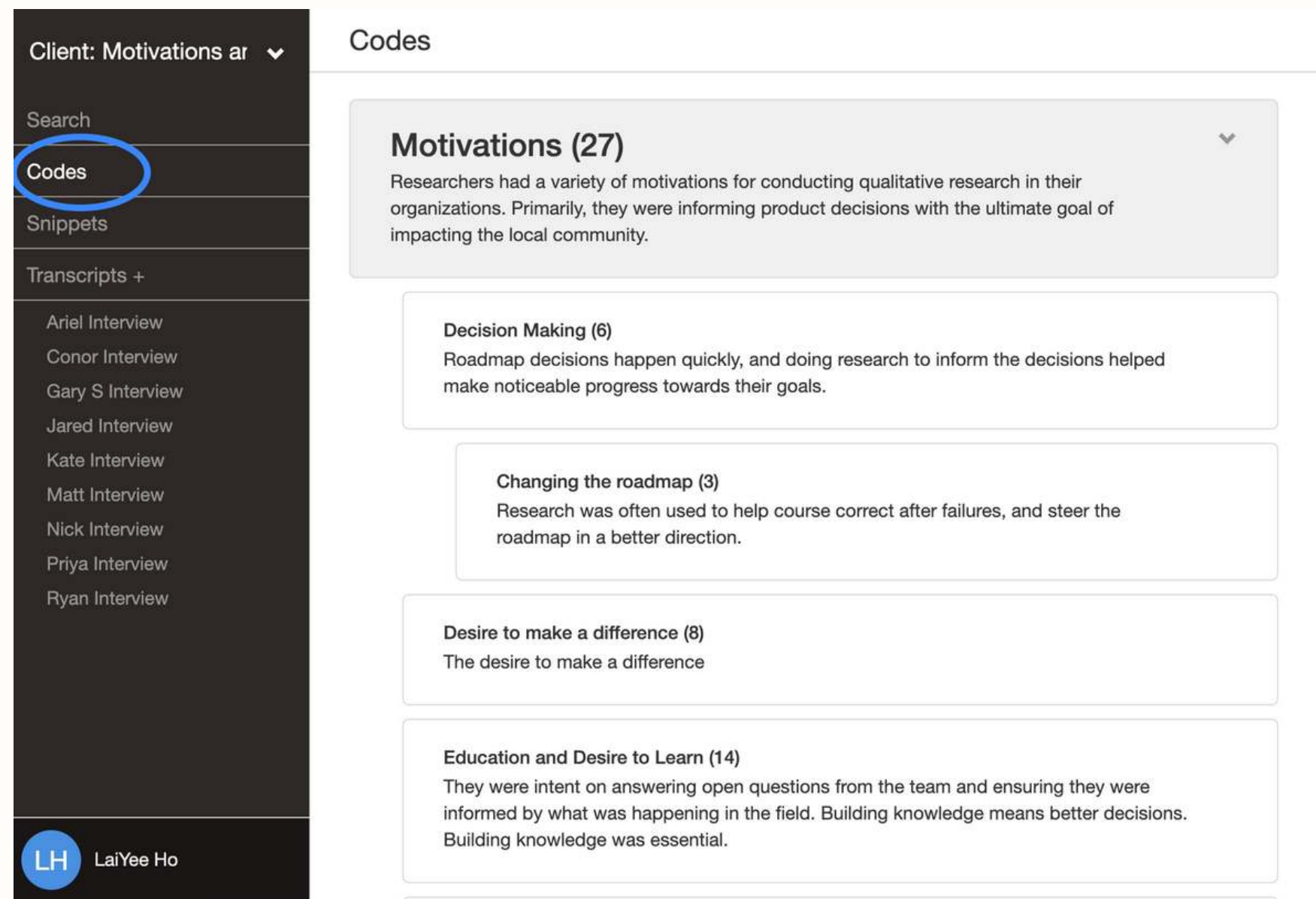
Motivations behind why people decide to use an analysis tool

Examples: saving time, staying organized, increasing transparency

Include:

- Name of code
- Code definition
- Examples of what to include with the code

Keep track of codes in a codebook



The screenshot shows the Delve codebook interface. On the left is a dark sidebar with navigation options: Search, Codes (highlighted with a blue circle), Snippets, and Transcripts +. Below Transcripts + is a list of interview transcripts: Ariel Interview, Conor Interview, Gary S Interview, Jared Interview, Kate Interview, Matt Interview, Nick Interview, Priya Interview, and Ryan Interview. At the bottom of the sidebar is a logo 'LH' and the name 'LaiYee Ho'. The main content area is titled 'Codes' and displays a list of code categories under the heading 'Motivations (27)'. The categories are: 'Decision Making (6)' with the definition 'Roadmap decisions happen quickly, and doing research to inform the decisions helped make noticeable progress towards their goals.'; 'Changing the roadmap (3)' with the definition 'Research was often used to help course correct after failures, and steer the roadmap in a better direction.'; 'Desire to make a difference (8)' with the definition 'The desire to make a difference'; and 'Education and Desire to Learn (14)' with the definition 'They were intent on answering open questions from the team and ensuring they were informed by what was happening in the field. Building knowledge means better decisions. Building knowledge was essential.'

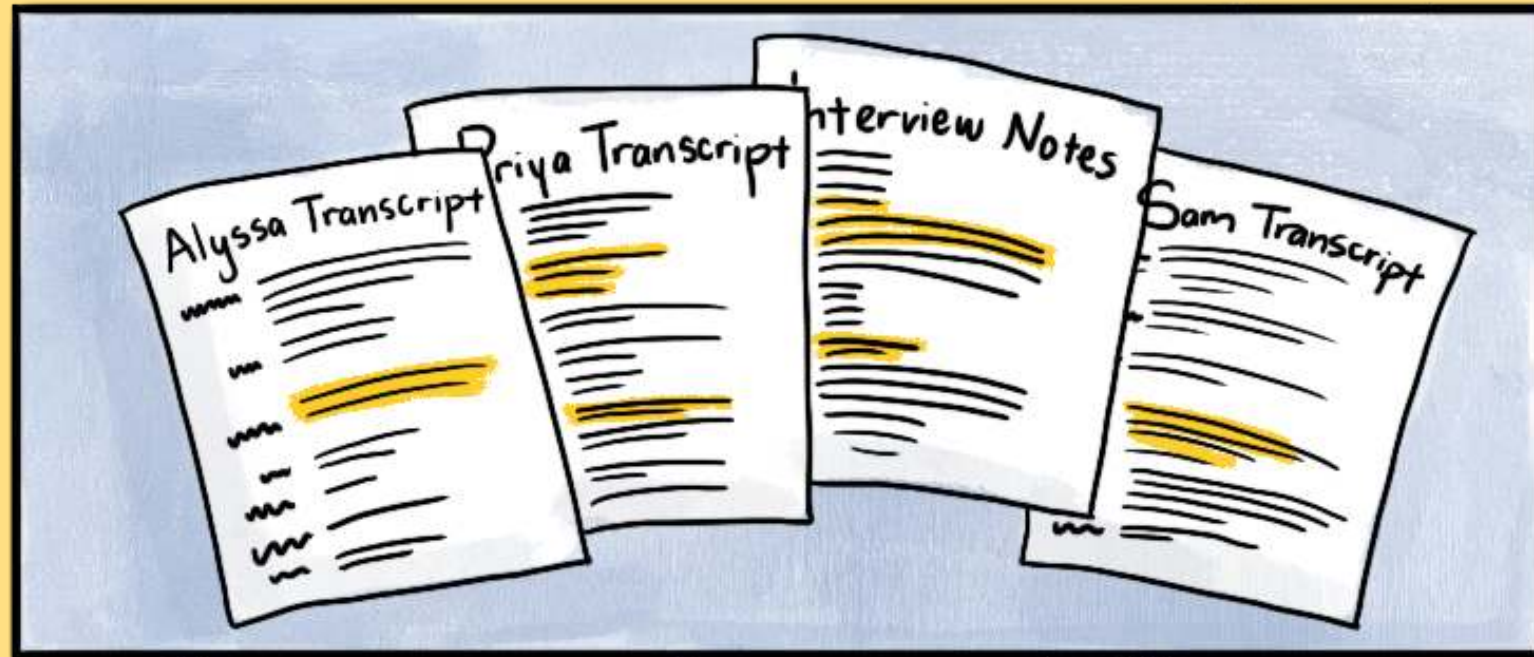
Include:

- Name of code
- Code definition
- Examples of what to include with the code

Step 2

Read through the transcripts





2. Read through transcripts

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Get audio transcribed

Spend time familiarizing yourself with the transcripts.

Read and take notes.

Step 3

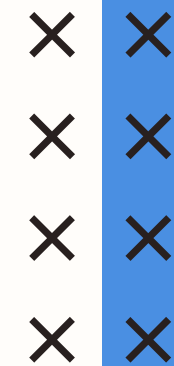
Decide what to code
and add new codes



3. Decide what to code

Be sure to code:

- Anything related to your initial codes
- Anything interesting, anything that surprises you
- Recurring patterns you see throughout the transcripts



Example coding methods

- Descriptive coding - summarize topic of the data
- In vivo coding - in the participant's own words
- Process coding - actions in the data. Words ending with "ing"

Descriptive coding

Descriptive codes are often in the form of a noun, and summarizes the topic of the transcript.

In vivo coding

In vivo codes utilize the language and terminology used by the participants.

This allows codes to reflect the perspectives and actions of the participants.

In vivo coding

In vivo codes utilize the language and terminology used by the participants.

This allows codes to reflect the perspectives and actions of the participants.

I think that's one of the fears with people doing interview research is the amount of data they'll have to analyze. They go, 'I'm gonna make such a mess and it's going to feel overwhelming¹. I've just wasted so much time and I've got no results.' I've just increased my anxiety² about what I have to do because I've made the analysis so massive. I guess the journey is about taking massive amounts of data, and breaking it down. You'll have so many little bits of information³ everywhere that you can use and re-arrange and tidy up in the end.

Codes:

¹ Feel overwhelming

² Increased anxiety

³ Bits of information

Process coding

With Process coding, you use codes to communicate an action in the transcript.

Codes will typically be gerunds that end with “ing”.

Process coding

With Process coding, you use codes to communicate an action in the transcript.

Codes will typically be gerunds that end with “ing”.

I generally [read through all the transcripts](#)¹. And I tried to do it right after the interviews, just read through them and [assign codes to things](#)². I thought might be valuable. There's always the thing that comes up in some initial interviews you don't realize something's going to be important and then after you hear it so many times, you're like, "Oh, yeah. I've heard this from a bunch of people."

But I did [use the search to look for quotes sometimes](#)³ and that was pretty helpful also. If I thought of something later on down the road, like, we were discussing cleanliness, then I would type in “cleanliness” or “clean” and see what kind of quotes came up.

A lot of my use for Delve was [preparing my end report](#)⁴ and pulling quotes. So when I was doing one particular section about, let's say, this neighborhood concept, I wanted a variety of quotes. I'd get one quote from Elaine, one from Larry, one from Eddy.

Codes:

[¹ Reading transcripts](#)

[² Assigning codes](#)

[³ Searching for quotes](#)

[⁴ Preparing end report](#)

Step 4

Collate codes with excerpts



Motivations (12)

Appears in 5/8 transcripts

Ariel Interview (3)

Caleb Interview (1)

Conor Interview (5)

Kate Interview (1)

Ryan Interview (2)

Researchers had a variety of motivations for conducting qualitative research in their organizations. Primarily, they were informing product decisions with the ultimate goal of impacting the local community.

Edit

Sort By Most Recent

Caleb Interview [1091 / 6651]

Since the product team moves fast, I want to make sure that my research is completed quickly enough to help them make decisions. Starting with high level ideas means I can share with the team and get early buy-in before going into the depths of the analysis.

Informing a decision

Motivations

Ryan Interview [4264 / 5504]

I still consider myself somewhat of a beginner, and am figuring things out as I go along. But basically there's an amount of data that I collected through interviews, and drawing from multiple existing sources.

Building knowledge

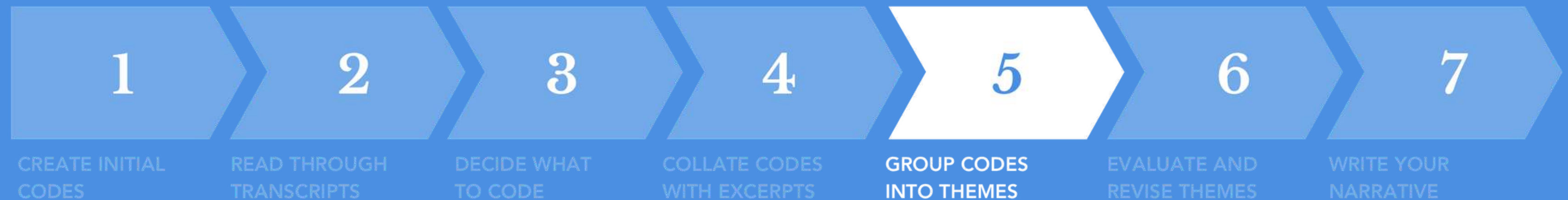
Motivations

4. Collate the codes with excerpts

Bring together all the excerpts you've coded and organize them by code.

Step 5

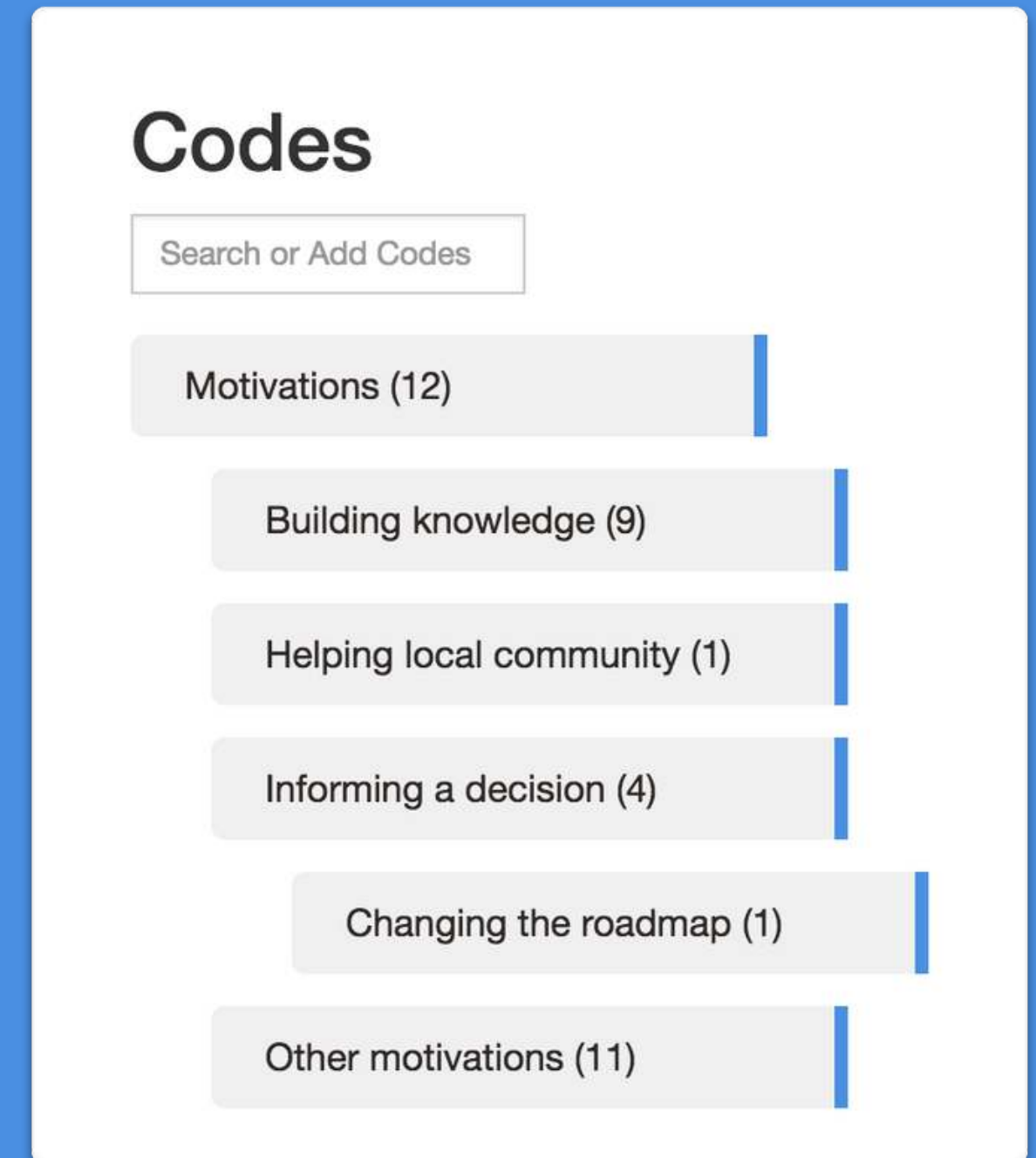
Group codes into themes



5. Group codes into themes

- Sort your codes into themes,
- Find causal conditions and context behind observations
- Look for consequences of phenomena
- Determine broader categories and make connections between codes

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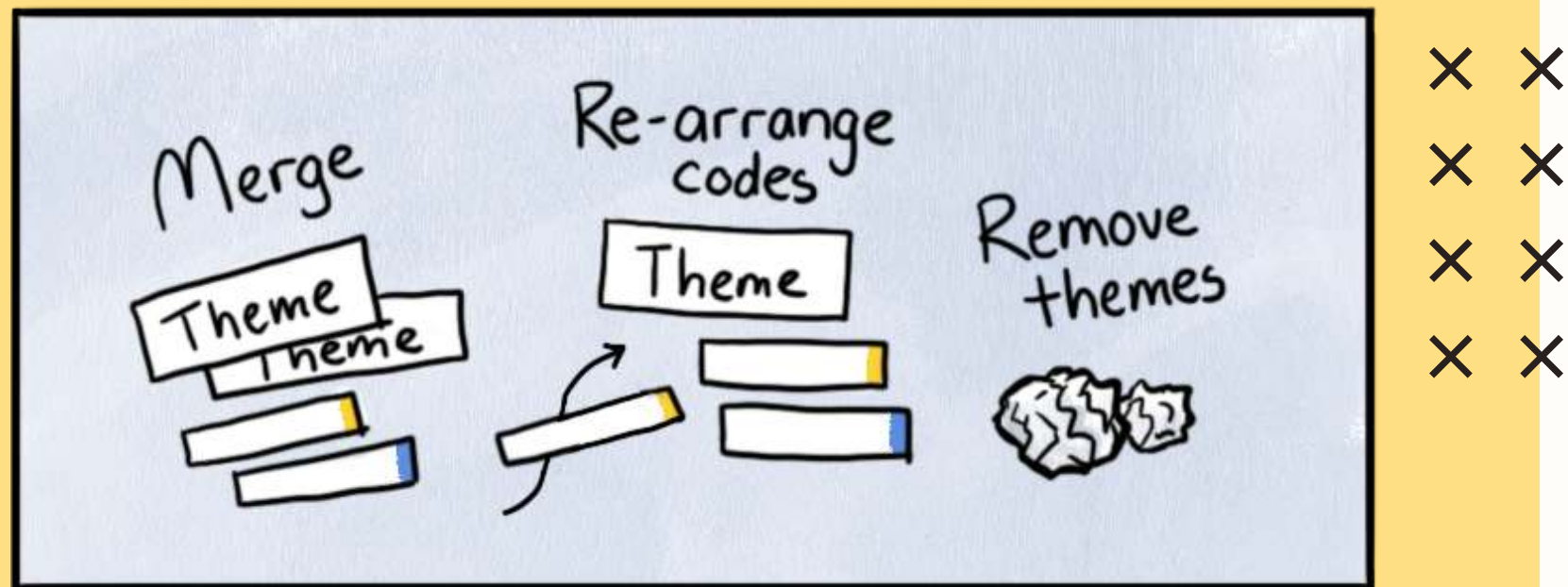


Step 6

Evaluate and revise themes



6. Evaluate and revise themes



- Ensure themes have sufficient evidence behind them
- Remove themes without enough data to back them
- Make sure themes are distinct from each other
- Merge similar themes

Step 7

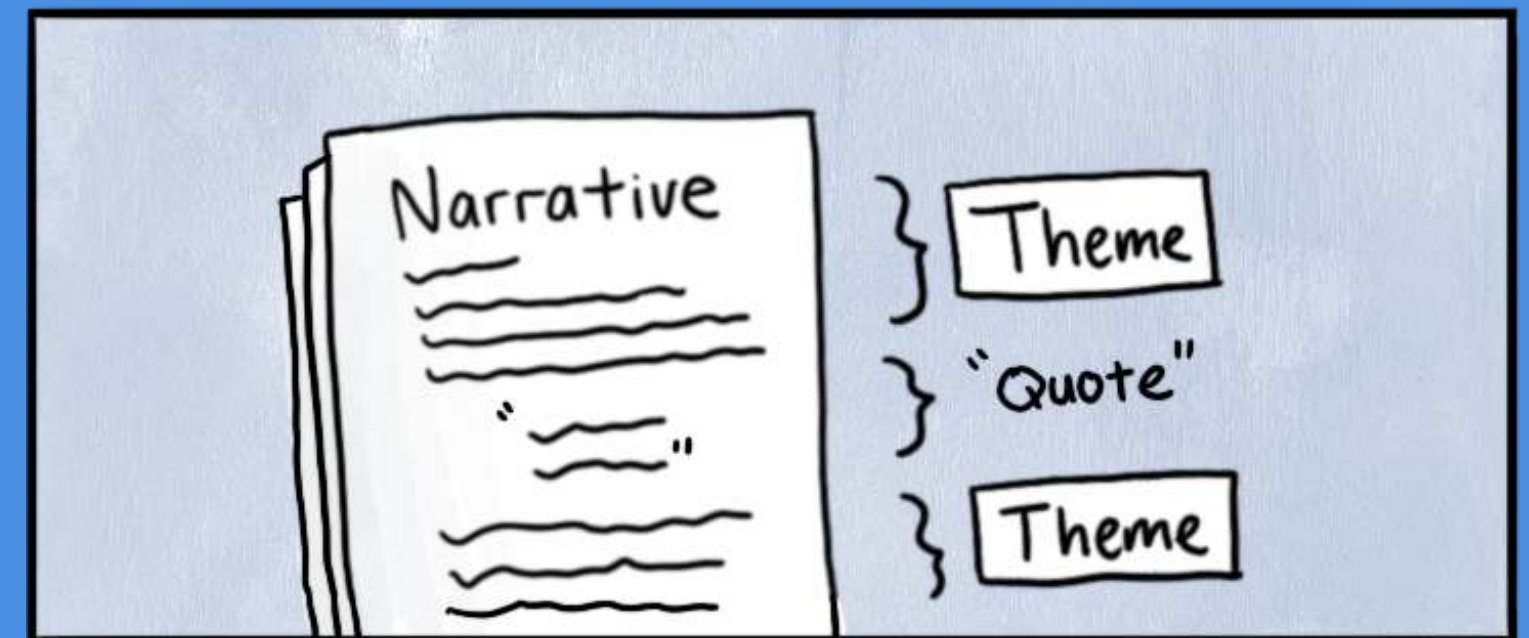
Write your narrative



7. Write your narrative

- Tell a cohesive story of your data.
- Have fully thought out themes
- Communicate the validity of your analysis and conclusions.

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Tools for Qualitative Coding

Tools for qualitative coding

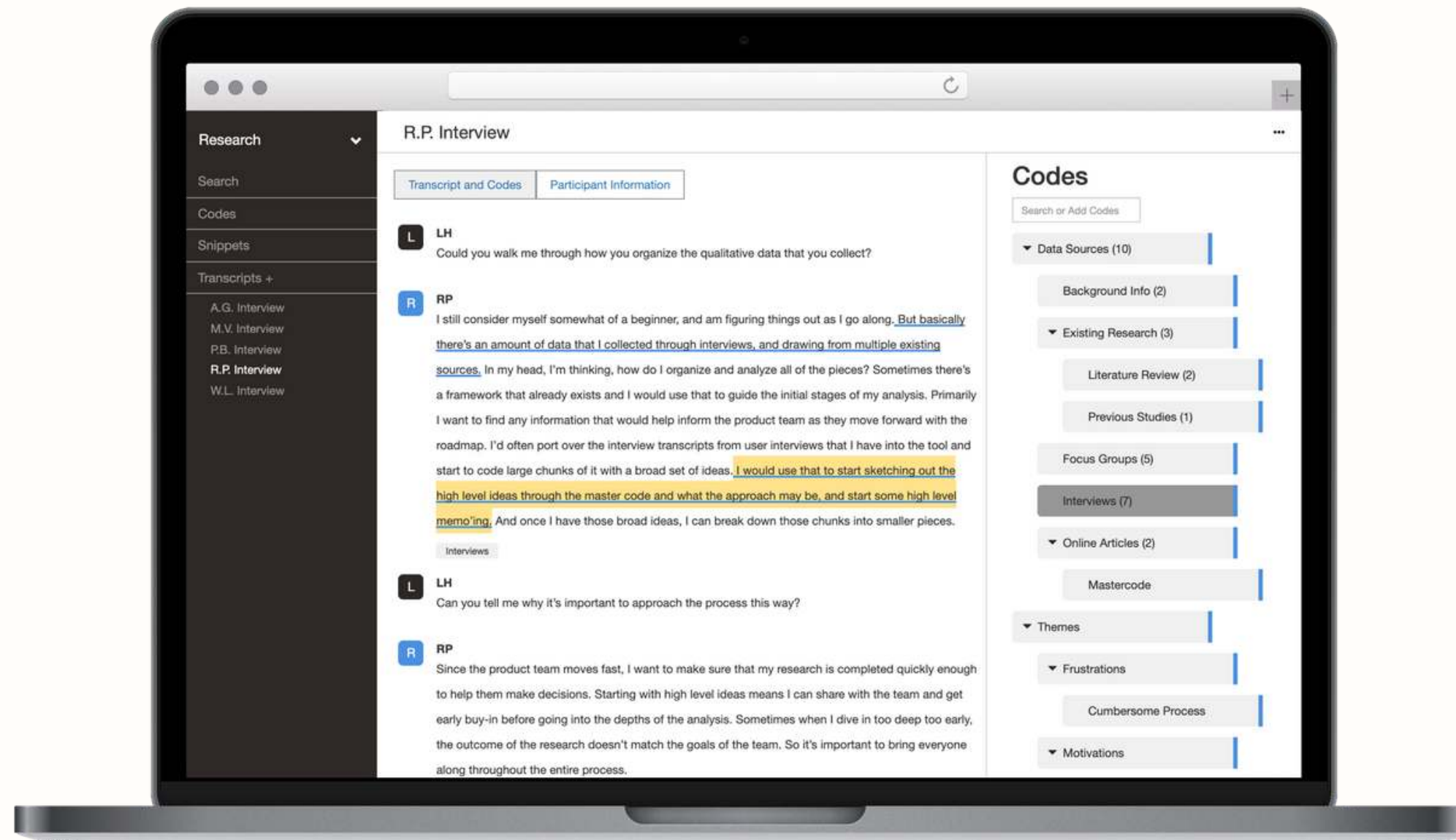
Coding by hand

Coding with
document
processors

Coding with
software

Delve

Software to Analyze Qualitative Data



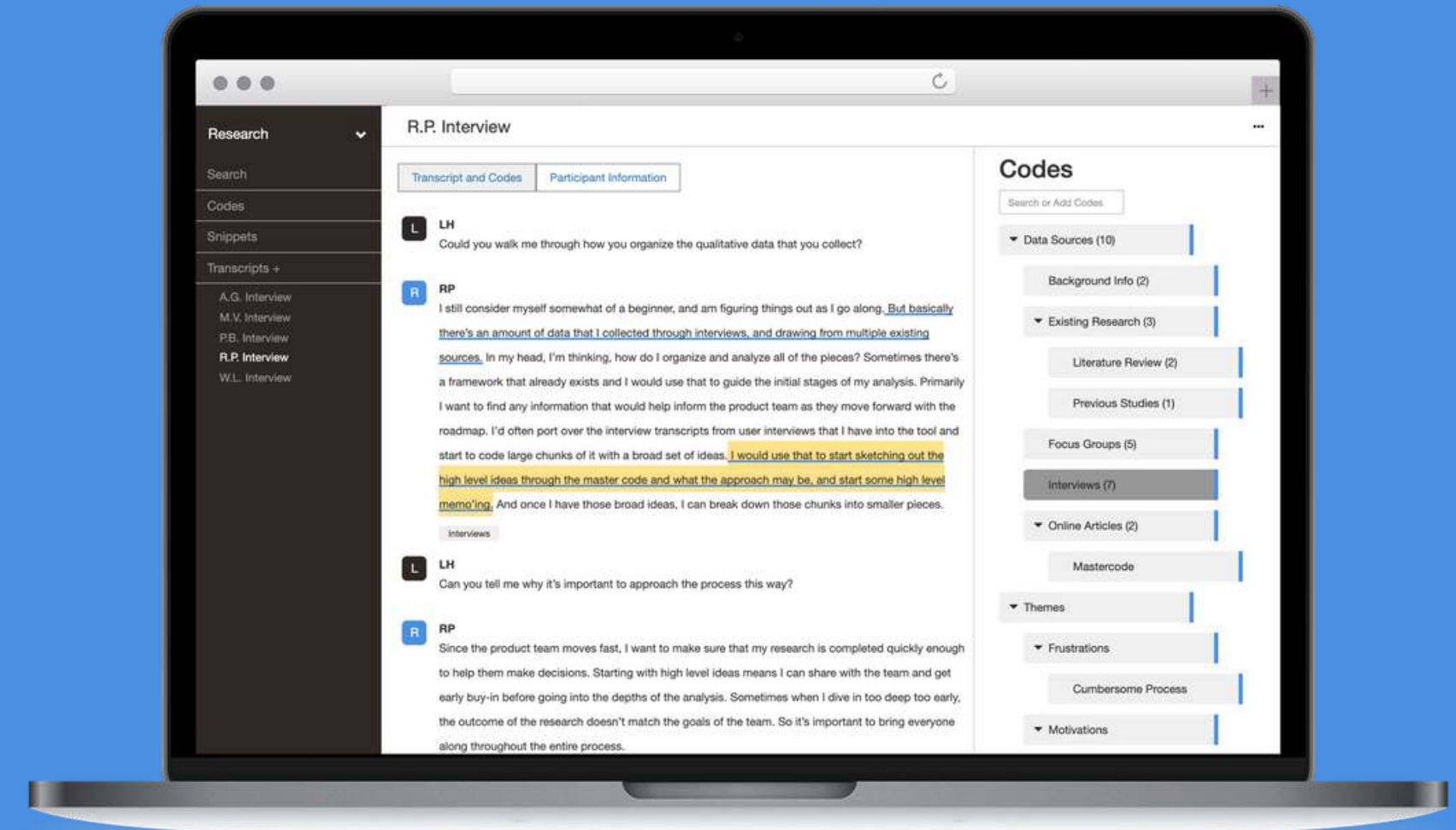
How Delve helps

- **Keeps you from feeling overwhelmed**
 - Simple and intuitive interface
- **Save time**
 - Automatically collates codes
 - Convenient search function
 - Keeps track of codes in codebook
- **Strengthens analysis and reporting**
 - Ensure give equal weight to data
- **Enables collaboration**
 - Online, remote friendly
- **Top notch customer support**
 - In app chat support



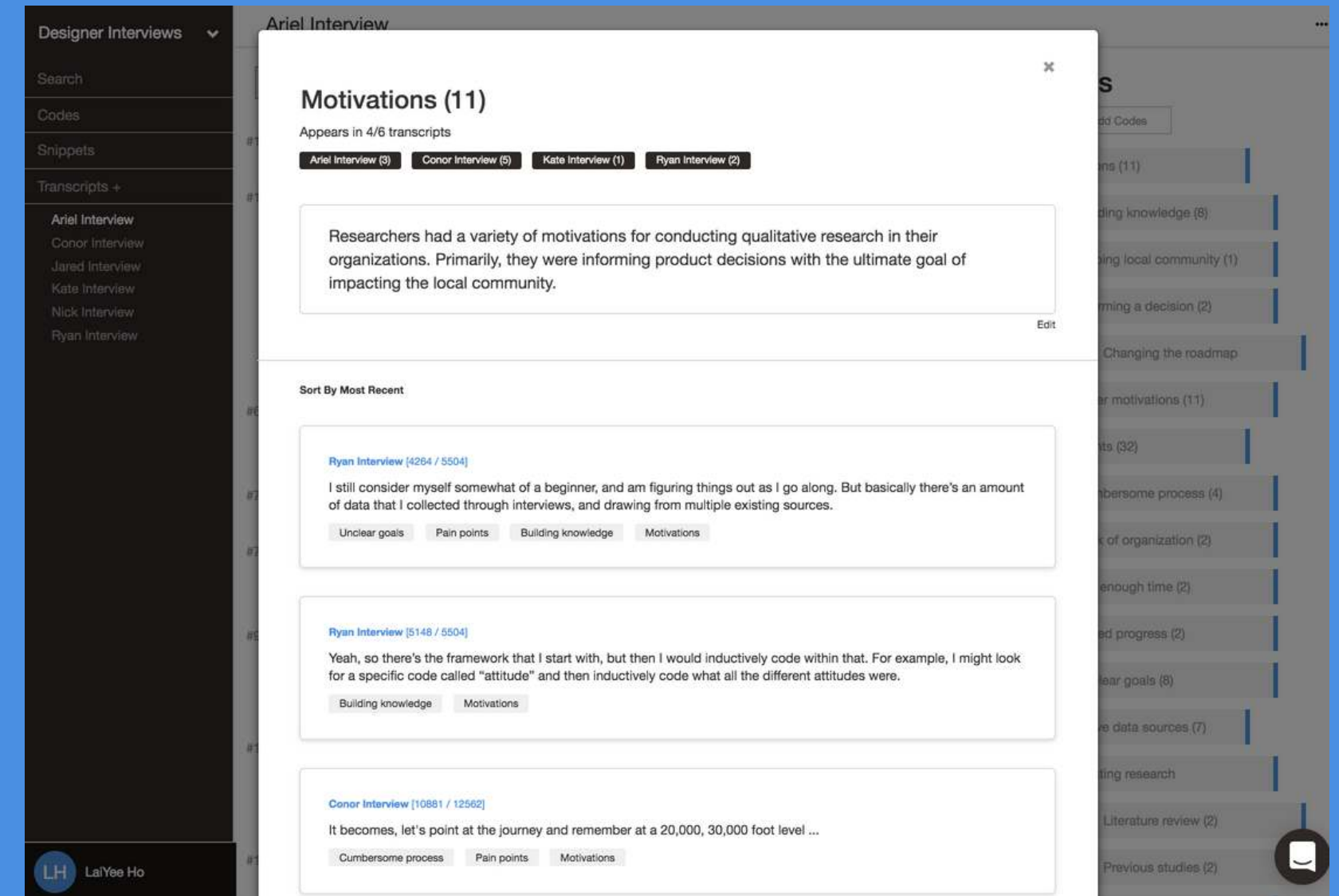
How Delve helps

Keeps you from feeling overwhelmed with a simple and intuitive interface



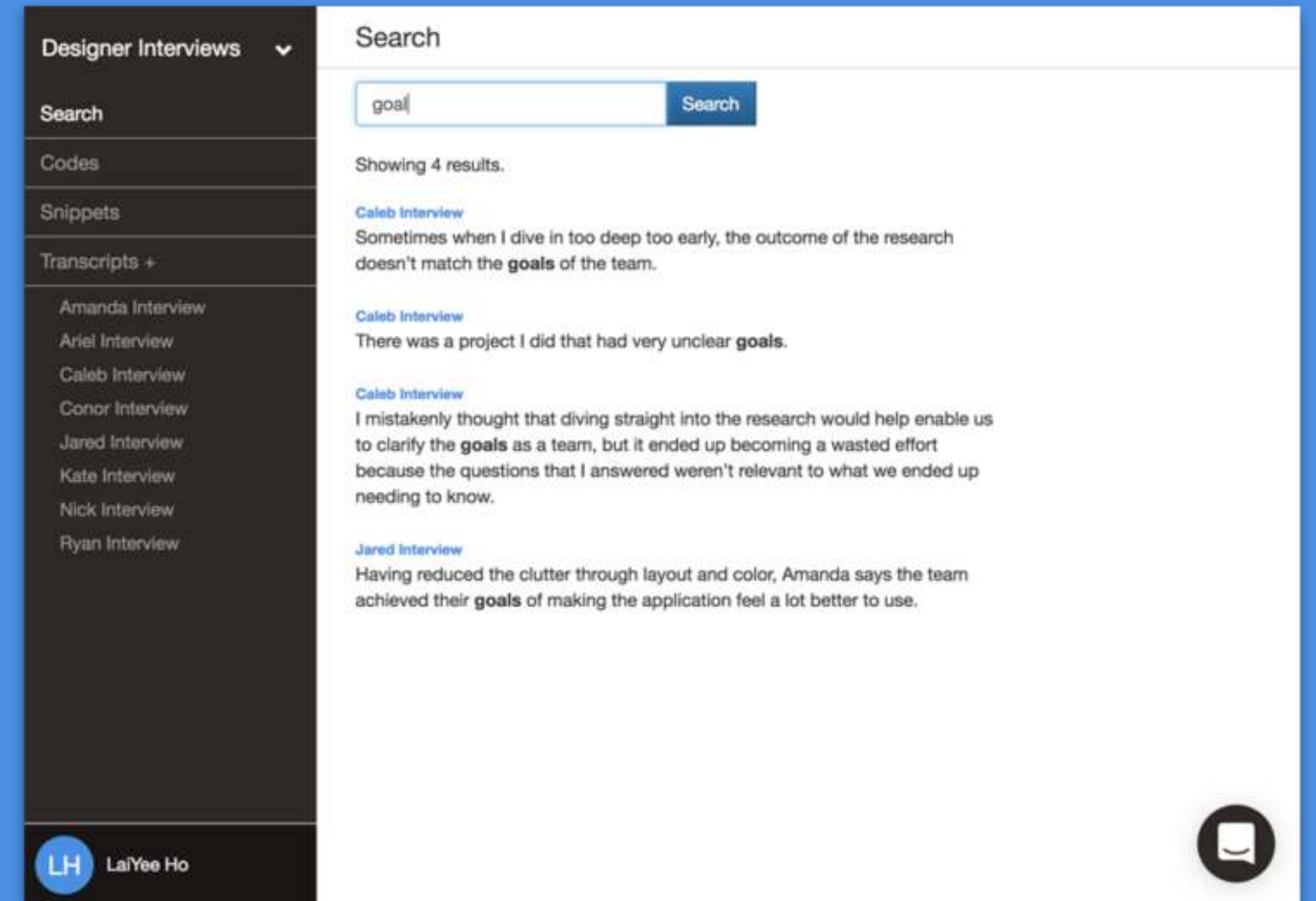
How Delve helps

Saves time by automatically collating codes



How Delve helps

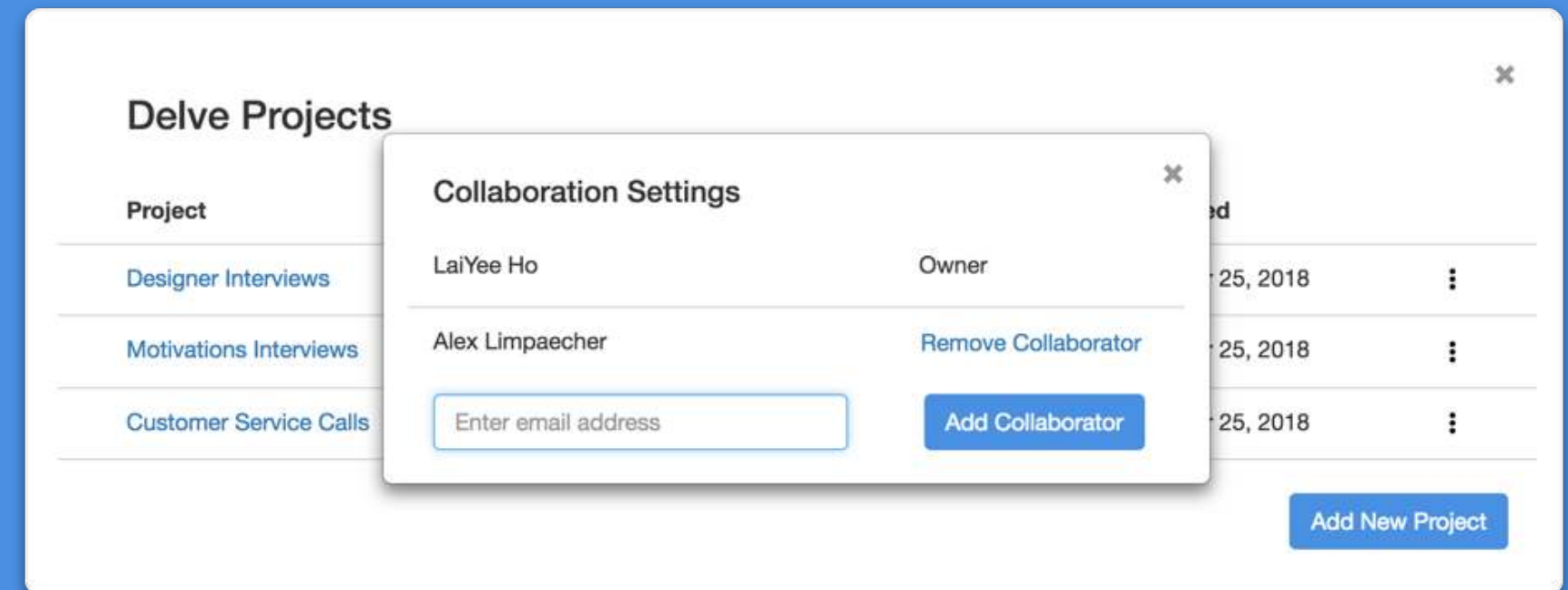
Saves time with ability to search all documents at once.



How Delve helps

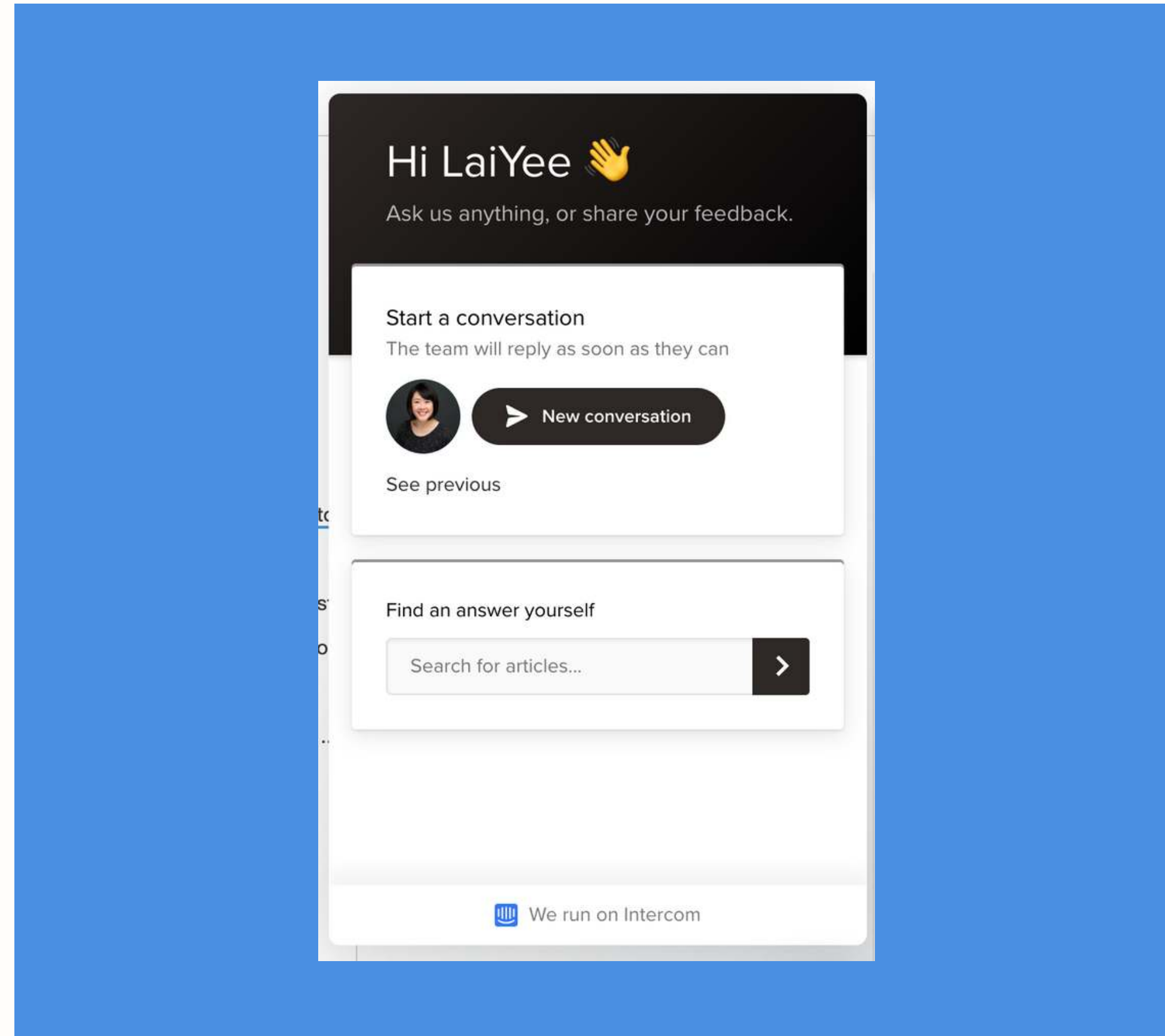
Enables remote collaboration

- Accessible on PC or Mac
- No compatibility issues
- Live updates



How Delve helps

Top notch customer support



Delve compared to other software

Easy to learn

Enables real time
collaboration

Affordable, flexible
pricing

Friendly customer
support

Accessible from
Mac or PC

What customers say about Delve

“Fantastic qualitative analysis and organization tool that saves time!”
— MARIA V.

“Delve is a good option for teaching qualitative methods and technologies together”
— THE CAQDAS NETWORKING PROJECT

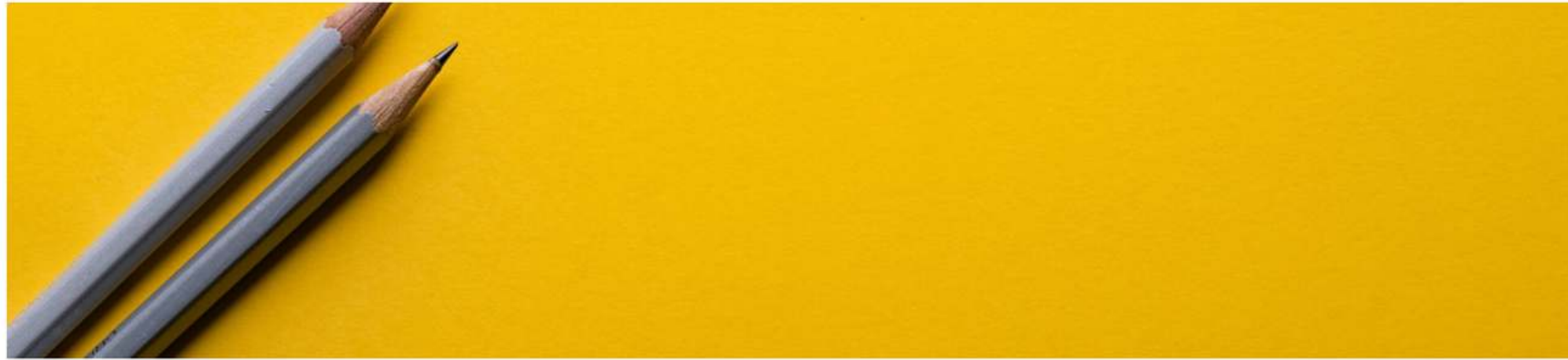
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— KIERAN H.

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The Essential Guide to Coding Qualitative Data

[What is qualitative research?](#) | [Types of qualitative data](#) | [How to transcribe an interview](#) | [Introduction to qualitative coding](#) | [How do you code qualitative data](#) | [Steps for coding](#) | [Tools for coding](#) | [Start free trial](#)

The process of coding qualitative data is an important part of the analytical process of analyzing qualitative research. When you generate data from qualitative methods such as semi-structured interviews, coding allows you to interpret, organize, and structure your observations and interpretations into meaningful theories. The coding process allows you to be reflexive, critical, and rigorous with your findings.

Q&A

Thank you!

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