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.

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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.
In many cases, qualitative coding happens here:

- Create research plan
- Conduct interviews
- Transcribe interviews
- Analyze transcripts
- Write report

Qualitative coding
Types of qualitative data

Transcriptions
Diary accounts
Documents
Case studies
Audio recordings
Video recordings
Notes
Observations
Types of qualitative data

Transcriptions
- Diary accounts
- Documents
- Case studies
- Audio recordings
- Video recordings
- Notes
- Observations
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."
Benefits of qualitative coding

- Be systematic and rigorous
- Find patterns and themes
- Find quotes quickly
- Check for biases
Types of Coding Processes

Deductive Coding

Inductive Coding
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

1. CREATE INITIAL CODES
2. READ THROUGH TRANSCRIPTS
3. DECIDE WHAT TO CODE
4. COLLATE CODES WITH EXCERPTS
5. GROUP CODES INTO THEMES
6. EVALUATE AND REVISE THEMES
7. WRITE YOUR NARRATIVE
Creating codes based on research questions

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

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

What **reactions** do they have to the new exercise regimens?
Creating codes based on an existing framework

Maslow's Hierarchy of Needs

- **Physiological needs**: food, water, warmth, rest
- **Safety needs**: security, safety
- **Belongingness & love needs**: intimate relationships, friends
- **Esteem needs**: prestige, feeling of accomplishment
- **Self-actualisation**: achieving one’s full potential, including creative activities

→ **Basic needs**

→ **Psychological needs**

→ **Self fulfillment 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

<table>
<thead>
<tr>
<th>Codes</th>
<th>Motivations (27)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>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.</td>
</tr>
</tbody>
</table>

- Decision Making (6)
  - Roadmap decisions happen quickly, and doing research to inform the decisions helped make noticeable progress towards their goals.

- Changing the roadmap (3)
  - Research was often used to help course correct after failures, and steer the roadmap in a better direction.

- Desire to make a difference (6)
  - The desire to make a difference

- Education and Desire to Learn (14)
  - 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

1. CREATE INITIAL CODES
2. READ THROUGH TRANSCRIPTS
3. DECIDE WHAT TO CODE
4. COLLABORATE CODES WITH EXCERPTS
5. GROUP CODES INTO THEMES
6. EVALUATE AND REVISE THEMES
7. WRITE YOUR NARRATIVE

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2. Read through transcripts

- Get audio transcribed
- Spend time familiarizing yourself with the transcripts.
- Read and take notes.
Step 3

Decide what to code and add new codes

1. Create initial codes
2. Read through transcripts
3. Decide what to code
4. Collate codes with excerpts
5. Group codes into themes
6. Evaluate and revise themes
7. Write your narrative
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 overwhelming’\(^1\). I’ve just wasted so much time and I’ve got no results. I’ve just increased my anxiety\(^2\) 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 information\(^3\) 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

1. CREATE INITIAL CODES
2. READ THROUGH TRANSCRIPTS
3. DECIDE WHAT TO CODE
4. COLLECT CODES WITH EXCERPTS
5. GROUP CODES INTO THEMES
6. EVALUATE AND REVISE THEMES
7. WRITE YOUR NARRATIVE
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

1. CREATE INITIAL CODES
2. READ THROUGH TRANSCRIPTS
3. DECIDE WHAT TO CODE
4. COLLATE CODES WITH EXCERPTS
5. GROUP CODES INTO THEMES
6. EVALUATE AND REVISE THEMES
7. WRITE YOUR NARRATIVE

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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
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.
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

“Easy to use, affordable, and top-notch customer support”
— 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.
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