Talk With People

Taking time to talk one-on-one or in groups with the people who use, deliver, and govern your service is possibly the most crucial step you can take towards improvement. Engaging with stakeholders can happen at any point in the service delivery process: before a request for proposals is released, after a new service begins, or during a service for continued feedback and iteration on what already exists.

You're talking with people to find out not just what's working and what isn't, but to better understand their fears, aspirations, and goals—things you'll never fully unearth in a survey. You can choose to lead focus groups to speak to more people at once, or individual interviews that allow you to gain deeper insights. The number of people participating will adjust the number of questions and how specific you can get in your conversation. Here you'll find **these templates** for talking with people:

Mapping Out the Stakeholders

- **Stakeholder Map**

Organizing an Outreach Plan

- **Outreach Plan**

Creating Research & Discussion Guides

- **Research Guide**
- **Discussion Guide**

Talking with People One-on-One

- **Release Form**

Organizing an Outreach Plan

Coordinating efficient and effective conversations with different stakeholders requires making an explicit plan.The goal here is to help the team stay on task with outreach efforts and your overall research goals by standardizing and streamlining your approach. The plan should include examples of how you will invite participants, the schedule and structure for interviews, and follow-ups for after the interview.

Template

Outreach Plan: ______________________________

The plan should include examples of how you will invite participants, the schedule and structure for interviews, and follow-ups for after the interview.

Organization	Point of Contact	Email or Phone	Date Contacted	Interview Date	Notes

Read more about how to use this template under
Talk with People at **nyc.gov/servicedesign**

Civic Service Design Tools + Tactics

Creating Research & Discussion Guides

First, it's important that your team is on the same page about what you're trying to understand through your research, and creating a research guide together will help you stay focused on that goal. Start by listing out the big things you'd like to answer. Is it something specific, like how people hear about a service? Or is it more general, like what's working now, and what could be improved? Write these research goals down, review them together, and finalize. This will guide the heart of your research.

Next, think about questions to ask your stakeholders to learn more about your research goals. It's best to think of this more as a casual conversation and less like a formal interview, and to script your questions accordingly. Go from general to specific: Start with easy get-to-know you questions like what neighborhood they live in, how they got started in their work, or what they do for fun. Then start to transition to more specific topics. Pose open-ended questions that elicit stories rather than single word answers. Try starting with lead-ins like, "Tell me a time when…" or "Can you think of an example when that happened?"

Pro Tip: Make sure you print out a copy of the discussion guide for all team members to have on hand during the interview. Know you can go off script whenever necessary, but make sure you're returning to questions and conversations related to your overall research goals.

Talking to People One-on-One

To lead a great interview, you need to make your interviewee feel comfortable and relaxed—less like they're being interviewed and more like they're just having a conversation. So everyone on the 2–3 person interviewing team should have a role: one person leads the interview, and 1–2 people take notes.

Interview leader:
The job of the lead interviewer is not just to ask questions—it's also to listen intently. Always remember that you are talking with an expert (especially if this is a user of your service), and that you are there to learn from them. Be curious, attentive, and friendly. Let the discussion guide give you direction, but also let the conversation unfold naturally. Uncovering the unexpected is why you're here!

Note taker(s):
This is a really important and mentally demanding job that's all about active listening. It's okay for the notetaker to ask follow-up questions, but they should try to remain focused on taking notes as close to verbatim as possible. Pay special attention to capturing compelling quotes, since these help tell the story of your project to others. Notes can be captured digitally or on paper during the interview, but it's best to digitize any paper notes after the interview so they can easily be shared across the team.

Pro Tip: If you're conducting multiple interviews, any role can get exhausting. It's good to switch throughout the day.

Template

Discussion Guide: ________________________

Today we are talking with: ____

Get to know you

- ★ Tip: Avoid questions that will result in yes or no answers
- ★ What neighborhood are you from?
- ★ How did you come into the work you do?
- ☐
- ☐
- ☐
- ☐

Current Practices

- ★ Can you tell me about your service or situation?
- ★ How do you provide your service to others? / How do you use this service?
- ☐
- ☐
- ☐
- ☐

Process

Extract details about their journey and experience

- ★ Tell me a time when …
- ★ Can you think of an example when _____ happened?
- ★ How do you communicate with a client or service?
- ☐
- ☐
- ☐
- ☐

Aspirations

- ★ What would make your job or service easier and more effective?
- ★ What information and tools do you wish you had?
- ★ What additional training would be useful to you or others?
- ☐
- ☐
- ☐
- ☐

Read more about how to use this template under
Talk with People at **nyc.gov/servicedesign**

Civic Service Design Tools + Tactics