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A step by step approach to qualitative data analysis, manually or automatically When we need to understand and report on people's opinions—such as customer feedback—we turn to qualitative data. Unlike numbers, qualitative data provides deeper insights into emotions, motivations, and experiences. However, analyzing this unstructured information is challenging. While tools like Excel, Tableau, and Power BI handle numerical data effortlessly, there are fewer tools for analyzing qualitative data. Even with Generative AI, much of the qualitative data analysis still takes place manually. The good news? AI-powered tools are making the process faster and easier. In this guide, we'll walk you through the five key steps of qualitative data analysis, breaking down both manual and automated approaches: Gathering and collecting data Organizing and structuring data Coding the data Analyzing qualitative data Reporting insights Let's explore these steps in detail! Key Takeaway Qualitative analysis reveals deeper insights beyond numbers. AI tools make qualitative research faster and easier. A structured five-step process ensures accurate insights. What Makes Qualitative Data Different? Qualitative data is typically generated through: Interviews Transcripts Surveys with open-ended questions Contact center transcripts Reviews, emails, or complaints Audio and video recordings Employee feedback Compared to quantitative data, qualitative data is unstructured and provides more depth. It helps answer questions, formulate hypotheses, and build understanding. However, analyzing qualitative data is difficult. While businesses can use feedback analytics platforms to process qualitative customer data, many still rely on manual methods. More businesses are shifting toward fully automated analysis because it's cheaper, faster, and more accurate. Depending on data privacy requirements in relation to Gen AI, some businesses use Microsoft Co-Pilot or ChatGPT, while others opt for advanced AI-powered research tools. These solutions help automate qualitative data analysis, making insights more accessible and actionable. So, how do we actually analyze qualitative data? Let's break down the process step by step. But first, what is qualitative data analysis? What is Qualitative Data Analysis? Qualitative data analysis is the process of gathering, organizing, and interpreting non-numerical data to uncover patterns, themes, and insights. It helps businesses and researchers make sense of open-ended responses, interviews, and other unstructured data sources. In customer feedback analysis, qualitative data analysis is used to extract meaningful insights from reviews, complaints, chat messages, support interactions, and social media comments—helping businesses understand customer sentiment and improve decision-making. How is qualitative data analysis different from quantitative data analysis? Qualitative Data Analysis dives into the stories hidden in non-numerical data such as interviews, open-ended survey answers, or notes from observations. It uncovers the 'whys' and 'hows' giving a deep understanding of people's experiences and emotions. Quantitative data analysis, on the other hand, deals with numerical data, using statistics to measure differences, identify preferred options, and pinpoint root causes of issues. It steps back to address questions like "how many" or "what percentage" to offer broad insights we can apply to larger groups. "Not everything everything that can be counted, counts, and not everything that counts can be counted" - William Bruce Cameron (1963) This quote, often mistakenly attributed to Einstein, clearly states that while numerical data is valuable, not everything meaningful can be measured. Qualitative data analysis captures the depth of human experiences, emotions, and challenges that statistics alone cannot fully explain. In short, qualitative data analysis is like a microscope, helping us understand specific detail. Quantitative data analysis is like the telescope, giving us a broader perspective. Both quantitative and qualitative data analysis are important, working together to decode data for different objectives. Qualitative Data Analysis methods Once all the data has been captured, there are a variety of analysis techniques available and the choice is determined by your specific research objectives and the kind of data you've gathered. Common qualitative data analysis methods include: Content Analysis This is a popular approach to qualitative data analysis. Other qualitative analysis techniques may fit within the broad scope of content analysis. Thematic analysis is a part of the content analysis. Content analysis is used to identify the patterns that emerge from text, by grouping content into words, concepts, and themes. Content analysis is useful to quantify the relationship between all of the grouped content. The Columbia School of Public Health has a detailed breakdown of content analysis. Narrative Analysis Narrative analysis focuses on the stories people tell and the language they use to make sense of them. It is particularly useful in qualitative research methods where customer stories are used to get a deep understanding of customers' perspectives on a specific issue. A narrative analysis might enable us to summarize the outcomes of a focused case study. Discourse Analysis Discourse analysis is a qualitative research method used to examine written and spoken language in relation to its social context. It goes beyond analyzing words and sentences, focusing on how language shapes meaning, social structures, and power dynamics. This method helps researchers understand how people construct reality through communication, revealing the deeper assumptions, values, and influences embedded in language. Discourse analysis is widely used in various fields, from social research to brand strategy, to uncover how language influences perception, identity, and decision-making. Thematic Analysis Thematic analysis is used to deduce the meaning behind the words people use. This is accomplished by discovering repeating themes in text. These meaningful themes reveal key insights into data and can be quantified, particularly when paired with sentiment analysis. Often, the outcome of thematic analysis is a code frame that captures themes in terms of codes, also called categories. So the process of thematic analysis is also referred to as "coding". A common use-case for thematic analysis in companies is analysis of customer feedback. Grounded Theory Grounded theory is a useful approach when little is known about a subject. Grounded theory starts by formulating a theory around a single data case. This means that the theory is "grounded". Grounded theory analysis is based on actual data and not entirely speculative. Then additional cases can be examined to see if they are relevant and can add to the original grounded theory. How to do Qualitative Data Analysis: 5 steps Now we are going to show how you can do your own qualitative data analysis. We will guide you through this process step by step. As mentioned earlier, you will learn how to do qualitative data analysis manually, and also automatically using modern qualitative data and thematic analysis software. To get best value from the analysis process and research process, it's important to be super clear about the nature and scope of the question that's being researched. This will help you select the research collection channels that are most likely to help you answer your question. Depending on if you are a business looking to understand customer sentiment, or an academic surveying a school, your approach to qualitative data analysis will be unique. Once you're clear, there's a sequence to follow. And, though there are differences in the manual and automatic approaches, the process steps are mostly the same. The use case for our step-by-step guide is a company looking to collect data (customer feedback data), and analyze the customer feedback - in order to improve customer experience. By analyzing the customer feedback the company derives insights about their business and their customers. You can follow these same steps regardless of the nature of your research. Let's get started. Step 1: Gather your qualitative data The first step of qualitative research is to do data collection. Put simply, data collection is gathering all of your data for analysis. A common situation is when qualitative data is spread across various sources. Classic methods of gathering qualitative data Most companies use traditional methods for gathering qualitative data: conducting interviews with research participants, running surveys, and social media monitoring. These methods are typically stored in documents, CRMs, databases and knowledge bases. It's important to examine which data is available and needs to be included in your research project, based on its scope. Using your existing qualitative feedbacks It becomes easier for customers to engage across a range of channels, companies are gathering even more solicited and unsolicited qualitative feedback. Most organizations have now invested in voice of Customer programs, support ticketing systems, chatbot and support conversations, emails and even customer Slack chats. These new channels provide companies with new ways of getting feedback, and also allow the collection of unstructured feedback data at scale. The great thing about this data is that it contains a wealth of valuable insights and that it's already there! When you have a new question about user behavior or your customers, you don't need to create a new research study or set up a focus group. You can find most answers in the data you already have. Most commonly, qualitative data stored in third-party solutions. Some businesses pull all data into a central database, such as Snowflake, Amazon Redshift, BigQuery or Databricks. You can export this data manually for a one-off project, but if you need to conduct the analysis more regularly, try to find an automated solution. For example, Voice of Customer or feedback analysis solutions often provide integrations into third-party tools and databases. Alternatively, APIs can be used to gather feedback. Utilize untapped qualitative data channels There are many online qualitative data sources you may not have considered. For example, you can find useful qualitative data in social media channels like Twitter or Facebook. Online forums, review sites, and online communities such as Discourse or Reddit also contain valuable data about your customers, or research questions. If you are considering performing a qualitative benchmark analysis against competitors - the internet is your best friend, and review analysis is a great place to start. Gathering feedback in competitor reviews on sites like Trustpilot, G2, Capterra, Better Business Bureau or on app stores is a great way to perform a competitor benchmark analysis. Customer feedback analysis software often has integrations into social media and review sites, or you could scrape the reviews with a third-party tool. G2.com reviews of software products are a good example of customer feedback data. You could pull reviews from G2 for your analysis. Step 2: Connect & organize all your qualitative data Now you all have this qualitative data but there's a problem, the data is unstructured. Before feedback can be analyzed and assigned any value, it needs to be organized in a single place. Why is this important? Consistency! If all data is easily accessible in one place and analyzed in a consistent manner, you will have an easier time summarizing and making decisions based on this data. The manual approach to organizing your data The classic method of structuring qualitative data is to plot all the raw data you've gathered into a spreadsheet. Typically, research and support teams would share large Excel sheets and different business units would make sense of the qualitative feedback data on their own. Each team collects and organizes the data in a way that best suits them, which means the feedback tends to be kept in separate silos. An alternative and a more robust solution is to store feedback in a central database, like Snowflake or Amazon Redshift. Keep in mind that when you organize your data in this way, you are often preparing it to be imported into another software. If you go the route of a database, you would need to use an API to push the feedback into a third-party software. Computer-assisted qualitative data analysis software (CAQDAS) Traditionally within the manual analysis approach (but not always), qualitative data is imported into CAQDAS software for coding. In the early 2000s, researchers have been using CAQDAS software such as ATLAS.ti, NVivo and MAXQDA. Another popular option was IBM SPSS, which handled both quant and qual data. NVivo Interface The benefits of using computer-assisted qualitative data analysis software: Assists in the organizing of your data Help view different interpretations of the data Allows you to share your data with others for collaboration Most of these solutions now offer some degree of AI assistance. The main thing to look out for is the ease of use and the ability to bring in your input into AI analysis. Organizing your qualitative data in a feedback repository Another solution to organizing your qualitative data is to upload it into a feedback repository where it can be unified with your other data, and easily searchable and taggable. There are a number of software solutions that act as a central repository for your qualitative research data. Here are a couple solutions that you could investigate: Dovetail: Dovetail is a research repository with a focus on video and audio transcripts. You can tag your transcripts within the platform for theme analysis. You can also upload your other qualitative data such as research reports, survey responses, support conversations (conversational analytics), and customer interviews. Dovetail acts as a single, searchable repository. And makes it easier to collaborate with other researchers. You can tag your transcripts within the platform for theme analysis. You can also upload your other qualitative data such as research reports, survey responses, support conversations (conversational analytics), and customer interviews. Dovetail acts as a single, searchable repository. And makes it easier to collaborate with other researchers. You can tag your transcripts within the platform for theme analysis. You can also upload your other qualitative data such as research reports, survey responses, support conversations (conversational analytics), and customer interviews. Dovetail acts as a single, searchable repository. And makes it easier to collaborate with other researchers. 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