

LEARNING HOW TO USE A QUALITATIVE ANALYSIS SOFTWARE PACKAGE

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Common Questions

As a qualitative analysis software trainer, I get a wide variety of people coming to my courses. Some are convinced that a particular software package is right for them before I ever meet them. Others are worried about using the computer for qualitative analysis. Still others confidently (and mistakenly) believe that the software package will automatically analyse their data for them. Each type of learner has a common set of questions about training. Those that are convinced that they have found the right package for them, are likely to ask - How long will it take me to learn? and When should I take a course? Those who are unsure about using computers for qualitative analysis may ask - Is this right package for me? or Will it influence how I analyse my data? and often Wouldn't it be quicker in the end if I use my tried and tested manual methods? Those who think the software package will do their thinking for them, usually do not have questions in the beginning, but are dismayed when they learn during the course how labour intensive qualitative analysis can be. (These are people who are complete novices to qualitative research and are not aware how even more labour intensive manual methods of analysis are!)

Before deciding to use a software package, I think it is important for new users to assess their learning needs. Once clear about their learning needs, new users will have a more solid basis for assessing software packages which support qualitative analysis.

Assessing yourself

The four learning tasks

I always start my workshops by outlining the four learning tasks that participants will be engaged in during the course. These are:

- approaches to qualitative analysis
- the nuts and bolts of the particular package
- applying manual techniques used previously to the software
- computer literacy

The focus of the workshop is on learning the "nuts and bolts" of the particular package. On my introductory workshops, I assume that people are absolute beginners and start from the basics.

However, in my public courses I will get a mixed group in terms of how experienced people are of qualitative analysis in general. I ask people to assess themselves in terms of being either:

- a complete novice
- inexperienced but "aware" through research training and reading
- an experienced qualitative researcher

The novice qualitative researcher

The complete novice will have to get to grips with understanding how to approach the analysis of qualitative data as well as the nuts and bolts of a software package. Often they come from disciplines that are new to using qualitative data. Their disciplines are likely to view qualitative data with suspicion and are unlikely to provide training in approaches to qualitative research. They also will lack peers they can turn to for advice. Some of these people may overestimate what a software program can do. They may expect it to do the analysis for them. They are also likely to be influenced by approaching the analysis to data in the way that has been structured by the tutorial(s) which come with the package or by the example study the trainer may use. If you are a complete novice and committed to doing research using qualitative data, you need to realise that learning how to use a qualitative analysis software package does not teach you how to do qualitative analysis. These packages are just tools. You need to

understand what approach you are adopting to your analysis before you can decide what features of the package you will want to use. Learning about the package should be part of a larger training programme regarding approaches to qualitative analysis.

The inexperienced but "aware" qualitative researcher

The second group who I call inexperienced but "aware" of the issues regarding approaches to qualitative analysis have had this general qualitative research methodology training. However, they are just starting to put this knowledge into practice in their first piece of research. They may not be sure exactly what approach to the analysis they may take. They may be aware of the range of possibilities but have no practical experience of any. They may be concerned about when they should take the course and how long it will take them to learn. The timing of the course is important. They may first need to know which package will be the right package for them. This may be difficult if they have not first clarified the approach they will take. However, once that is clarified then it may be the time to do a workshop in a particular package. This way they can see whether it will be appropriate to their project. Some people make the mistake of only taking a workshop once all their data is collected. It is important to do the course early enough so you can experiment with the first bits of data you get. That way you become familiar with the package and what you can do with it with a manageable amount of data. How long it would take this group to learn a software package depends on a number of factors. The first is how well they have been trained in qualitative analysis. The clearer they are about their analytical strategy, the easier it will be to learn how to use a software package. The second factor (which should not be under-emphasised) is how comfortable they are with computers. They need to be at ease with the Windows environment and be familiar with how their files are structured. If you fall in this category, a good rule of thumb is to assess how comfortable you feel when upgrading a word-processing package. Also how confident you feel in exploring different features of your word-processor. Some people

are "naturals" with computers. In combination with a good training in qualitative analysis, they should be able to quickly pick up the basics of package after a well-structured workshop. Others, who are not confident in their computer skills could take a much longer time and may give up all together if they do not receive proper support.

The experienced qualitative researcher

The experienced qualitative researcher will have done a number of projects analysing data using manual methods. In my experience, they tend to be of two types. The first type enthusiastically embraces a particular software package, aware how it manages their data far better than paper systems. This group also tends to feel comfortable with computers and are fairly computer literate. The other type is a bit suspicious of using computers in general to analyse qualitative data. They are particularly concerned that the structure of the programme can limit the analysis or push them to analyse the data in a particular way. Unlike the novices, they have the qualitative analysis skills not to let this happen. I suggest that there are three things they should look out for during a workshop:

- what features of the package can take over their manual systems for organising qualitative data
- what aspects of their manual approach cannot be done by a particular package, and which they will have to continue to do manually or use another package which has the features that support their approach
- what features of the package are not possible to do manually. Here they should consider whether these features are consistent with their approach to qualitative analysis.

It does require some new learning and they will have to allow the time for that new learning. Some experienced qualitative researchers feel that their manual methods will be quicker in the end. I find that this is a self-fulfilling prophecy. If someone is unsure about a particular package and only half-heartedly uses it, then their hesitance will

cost them time. Of course they should assess the software to see if it is relevant to their approach. But the best way to assess it is to attend a training course and then immediately after the course spend some time playing with their own data in the package. In assessing a software program, it is important to remember that it will offer a number of different tools that you can use. It is up to you to decide which combination of tools is relevant to your project. It is important to remember that these packages are just tools. You only need to use the features of a package which are relevant to your approach. That is why it is important to be clear about your approach.

Action Plan

If you are committed to learning how to use a particular package, you can set up your own action plan dependent on your needs.

First, assess how experienced you are in analysing qualitative data. If you are a novice, you need to attend courses in qualitative analysis as well as in a particular software package. If you are from a discipline that has only started to use qualitative data, build yourself a support network. Subscribe to a list such as QUALRS-L which is for qualitative researchers. You can learn a lot from the discussions that go on there and also you can ask your own questions. If you work or study in a university, seek out colleagues from departments that have more of a tradition of using qualitative data.

Secondly, if you are sure of your approach to qualitative analysis but not confident of your computer skills, take a course in Windows, Windows Explorer and in a word-processing package. You will find these skills useful not only for a particular qualitative software package.

Finally, if you are an experienced researcher but not sure about using computer packages for qualitative analysis, invest some time getting to know a package. Don't approach learning a package half-heartedly. You will waste more time in the long run. And do take a software training course. These packages can be used in different ways according to the nature of the project. Make sure that you use

your package correctly and to its full potential. You should be in charge of the package. Do not let the package lead your analysis.

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