Data Collection Planner

Steps in Creating the Data Collection Plan

1. Decide what kinds of data you would like to collect and possible sources for that data.

   You can collect existing data and data that you generate from interviews, surveys and other tools as part of your critical thinking process. Data can be qualitative (words, text) or quantitative (numbers).

2. Decide how you will organize the data.

   Determine how you will store the "raw" data. Label all data so you can identify the source, who collected it and when.

3. Decide how you will analyze the data.

   How you analyze the data will depend on what kind of data it is. For qualitative data you will generally use some form of categorization and counting. For quantitative data you may use graphs, calculate averages and use other mathematical techniques.

4. If you are generating data, create the protocols. If possible, test the protocols to make sure they work the way you want.

5. If you are working with others to collect the data, provide any training or familiarization that they may need so that you can ensure the consistency of the data collected.

6. If this is a large data collection effort, run a pilot to test the protocols.

   During the pilot phase you are likely to identify additional questions and issues that were missed in the initial collection. You can use the pilot as an opportunity to update the data collection plan to accommodate these issues.

7. Contact the individuals and schedule data collection.

8. Collect the data.

9. Analyze the data.

An Agile Critical Thinking™ Job Aid
Data Collection Planner

Project:	Created by:	Date:	Version:

Data We Want to Collect	Source	Collection Technique	What We Want to Know	How We Will Organize Data

Data Collection Plan

Project: Replace the Copy Machine

Data We Want to Collect	Source	Collection Technique	What We Want to Know	How We Will Organize Data
Usage data over the last year	Departmental staff	Review existing usage reports	How much capacity we need What functions are being used	Extract data from report Provide a summary, averages and peak usage
Manager input	Management staff	Interview	Management concerns	Summarize interviews as bulleted list under categories
Staff input	Departmental staff	Survey	What people like What their frustrations are	Present data in charts or graphs; highlight results
Cost of acquisition	Vendors	Send an RFI to selected vendors	What are all the costs involved in either purchase or leasing machines that meet our needs?	Create a comparison table, comparing a list of all costs across vendors, for comparable machines.
Cost of ownership – supplies and service	Vendors	Send an RFI to selected vendors	What are all the costs involved in running the machines?	Create a comparison table, comparing a list of all costs across vendors, for comparable machines
Product reviews	Business product review websites, customer reviews posted on websites	Web research	Customer experience with copiers and vendors we are considering	Capture ratings data, where available; key pros and cons; select representative quotes