

# SOP Template: Categorization and Coding of Qualitative and Quantitative Feedback

This SOP details the systematic process for **categorization and coding of qualitative and quantitative feedback**, encompassing the collection, organization, and analysis of data from various sources. It includes steps for data segmentation, codebook development, application of coding schemes, validation of coded data, and integration of qualitative insights with quantitative metrics to ensure accurate interpretation and actionable outcomes. The purpose is to enhance data reliability and support informed decision-making through structured feedback analysis.

## 1. Purpose

To establish a consistent methodology for the collection, categorization, and coding of feedback data, facilitating effective assessment and actionable insights.

## 2. Scope

- Qualitative feedback (e.g., open-ended survey responses, interviews, focus groups)
- Quantitative feedback (e.g., ratings, Likert-scale questions, numerical metrics)
- All projects or processes requiring structured feedback analysis

## 3. Responsibilities

- Data Collection Team:** Gather and prepare raw feedback data.
- Analysis Team:** Segment, categorize, and code the data.
- Quality Assurance:** Validate coding reliability and data interpretation.
- Project Lead:** Oversee the process and finalize analysis outcomes.

## 4. Procedure

- Data Collection and Organization**
  - Collect feedback from all relevant sources.
  - Consolidate qualitative and quantitative data in a centralized format (e.g., spreadsheet or data software).
- Data Segmentation**
  - Segment feedback by type (qualitative/quantitative), topic, or source as appropriate.
- Development of Codebook**
  - Design initial categories and codes based on a preliminary review of feedback.
  - Define each code/category with clear descriptions and examples.
  - Revise codebook iteratively through team review.

Example of Codebook Table:

Code	Description	Example
SUPP_COMM	Positive comments on support and communication	"Staff responded promptly."
TECH_ISSUE	Mention of technical difficulties or problems	"App crashed several times."
SATIS_RATING	Quantitative satisfaction rating (1-5 scale)	4

- Application of Coding Schemes**
  - Apply codes to qualitative comments, and categorize quantitative responses as defined.
  - Utilize qualitative data analysis tools or manual methods as needed.
  - Document applied codes for traceability.
- Validation and Quality Control**
  - Double-coding by a second reviewer for reliability assessment.
  - Resolve discrepancies through discussion or adjudication by a third party.
  - Calculate inter-coder reliability where applicable (e.g., Cohen's kappa).
- Integration and Analysis**
  - Aggregate coded data for analysis.
  - Integrate qualitative themes with quantitative metrics for comprehensive insights.
  - Produce analytical reports and recommendations based on findings.
- Documentation and Storage**
  - Maintain secure, organized records of raw feedback, coding, and analysis results.

- Document all codebook versions and revisions for transparency.

## 5. References

- Relevant data protection and privacy policies
- Industry standards for qualitative/quantitative data analysis
- Organizational best practices

## 6. Revision History

Version	Date	Description	Author
1.0	2024-06-01	Initial SOP template	Data Insights Team