



The Humanitarian’s “Phone Call Interview” Checklist

This checklist is great if you are transitioning from in-person interviews for surveys and assessments to remote, phone-based interviews for a survey or assessment. For more guidance on how to think through transitioning to remote monitoring and evaluation activities, [see this blog post](#).

At least ONE DAY BEFORE the Interviews Begin:

- Carry out a Sampling Methodology (if needed) to decide who you will Interview
- Compile a full list of names and phone numbers of everyone to be interviewed
- Prepare an introduction script to explain who you are and why you’re calling
- Prepare a consent question to allow the interviewee to accept the phone interview
- Make sure you have designed a well-thought-out structured interview questionnaire
- Programme the questionnaire into KoboToolbox (or other software) to collect data
- Make sure you have a “Comments” question at the very end to record your notes
- Get a headset with headphones and a mic to use while you make the calls
- Figure out if you can (and how to) record calls using your phone
- Do a practice-run with a colleague – call them, interview them, record the data, tweak your process if anything didn’t go well

RIGHT BEFORE you make the Phone Call:

- Open up questionnaire in KoboToolbox’s Webform so you can enter data on your computer
- Get comfortable – get your headset plugged in, sit in a comfortable chair
- Have a notebook and pen handy in case you need to scribble a note
- Have your list of names and phone numbers ready

ON the Phone Call:

- Be VERY friendly! And explain exactly who you are.
- Get Consent
- Ask if you can record the call
- Record the call if they say yes
- Record answers directly into your data collection software
- Record answers in the language of the interview

RIGHT AFTER the Phone Call:

- Translate the questions into English if necessary to have English results
- Record any notes that will remind you of anything needed in your final “Comments” question in your questionnaire
- Make any adjustments to the questionnaire if needed (for example, if you come across an error in the questionnaire when you’re interviewing)