# MAXQDA Qualitative Content Analysis Checklist

## 1. Research Design and Theoretical Foundation

- Define the **main research question(s)**.
- Formulate supporting **sub-questions** to guide operational focus.
- Choose your **qualitative methodology** (e.g. qualitative content analysis, thematic, discourse analysis).
- Clarify your **epistemological and ontological standpoint**.
- Define the **unit of analysis** (e.g. word, sentence, paragraph, document).
- Determine whether your coding logic is **deductive, inductive, or combined**.
- Justify **case selection** (documents, actors, timeframes).
- Reflect on your own assumptions and **write a reflexive memo**.
- Outline expected **outputs** (themes, actor maps, narrative patterns, contradictions).

## 2. Project Setup in MAXQDA

- Open MAXQDA → **File** → **New Project**.
- Name and save your project using a versioned, research-consistent file name.
- Set up local folder structure for:
    - Raw data
    - MAXQDA backups
    - Codebooks
    - Exports and reports

## 3. Data Preparation Before Import (optional)

- Collect all relevant texts and transcripts in standard formats (Word, PDF, TXT, Excel).
- Ensure **consistent formatting and anonymization (optional)**.
- Prepare an Excel sheet with **document metadata** (e.g., actor, date, source type).
- Create a **data inventory** log.
- Assign unique IDs to each file (e.g. POL_CZ_PM_2020_01.docx).

# 4. Importing Data into MAXQDA

- Import documents via the **Import tab**.
- Organize files into **Document Groups** (e.g., by year, country, institution, actor, case).
- Assign **document variables** via the Variables tab or spreadsheet import.
- Write **Document Memos** for contextual info (e.g. who, where, when, what).
- Save and back up your project at this stage.

# 5. Data Familiarization

- Read each document without coding.
- Highlight notable segments without applying codes (optional).
- Write **Document Memos** with initial impressions.
- Note emerging actors, metaphors, rhetorical strategies, contradictions.
- Reflect on your reactions and biases in a **free memo**.

# 6. Paraphrasing Key Segments (Pre-Coding)

- Highlight complex or meaningful passages and **use the Paraphrase tool**.
- Restate them in simplified terms to clarify meaning.
- Focus on how actors, themes, or positions are expressed.
- Use paraphrases to prepare for **inductive coding or theory development**.
- Review the **Paraphrasing Matrix** to surface initial conceptual categories.

# 7. Code System Development

## 7A. Deductive Coding Preparation

- Build a **Codebook** based on theory or previous research.
- Create **parent codes and subcodes** in MAXQDA reflecting this framework.
- Attach **Code Memos** explaining the scope, logic, and examples for each code.
- Color-code categories for readability and thematic clarity.

## 7B. Inductive Coding Preparation

- Use observations from paraphrasing and memos to create **emergent codes**.
- Label codes precisely and update structure as themes evolve.
- Attach **memos** to inductive codes explaining your reasoning.

### 7C. MAXQDA Tools by Coding Logic

- **Deductive Coding Tools:**
    - Manual coding with predefined code system
    - Search & Autocode for keywords
    - Dictionary-based coding (MAXDictio)
    - Codebook import via Excel
- **Inductive Coding Tools:**
    - Paraphrasing + open coding
    - In-vivo coding
    - Segment memos to generate themes
    - Visual organization via MAXMaps

## 7D. Intercoder Calibration (If Team-Based)

- Have all coders apply the initial code system to one or more shared texts.
- Use **Intercoder Agreement Tool** to compare overlap.
- Refine code definitions, merge or split codes if agreement is low.
- Update the codebook and code memos.
- Proceed to full coding only once agreement is sufficient.

## 8. Initial Coding and Coding Options

- Highlight segments and apply codes using:
    - Manual coding (right-click or drag-and-drop)
    - In-vivo coding (using original text as code name)
    - Quick Code bar
- Optional methods:
    - **Search & Autocode** (for recurring words, actors, discursive devices)
    - **Dictionary-based coding** (semantic categories via MAXDictio)
- Assign **multiple codes** to overlapping meanings.
- Write **Segment Memos** when meaning, context, or coding decision needs elaboration.
- Use color coding to visualize categories in documents (optional).

## 9. Ongoing Code System Refinement

- Review **code frequencies** and distribution across sources.
- Merge or split codes as needed to avoid conceptual overload.
- Add new codes as insights deepen.
- Update **code memos** and the **code evolution log (optional)**.
- Periodically back up the project.

# 10. Thematic Summarization and Analytic Memos

- Use the **Summary Grid** to write comparative summaries per code across documents.
- Write **Analytic Memos** capturing:
    - Patterns
    - Absences
    - Contradictions
    - Strategic framings
- Compare documents by groups or variables.

# 11. Visual Tools and Mapping Patterns

- Use **Code Relation Browser** to detect overlaps and correlations.
- Generate **Code Maps** to cluster themes and identify hierarchies.
- Use **Document Portraits** to analyze where codes appear within texts.
- Build **MAXMaps** to visualize:
    - Actors and their relationships
    - Argumentation structures
    - Hierarchies of discourse

# 12. Variable-Based & Comparative Analysis (optional)

- Use **document variables** for comparison (e.g., country, actor type).
- Run **Crosstabs** to analyze thematic variation across groups.
- Use **Stats Module** for descriptive stats on codes and documents.
- Interpret structural patterns (e.g., populist vs institutional actors).

# 13. Advanced Searches and Linking (optional)

- Use **Search & Autocode** to locate recurring concepts or expressions.
- Link relevant coded segments across texts using **Internal Links**.

- Use **lexical search tools** in MAXDictio for rhetorical, modal, or evaluative language.

# 14. Exporting and Reporting

- Export:
    - Retrieved Segments (with codes)
    - Memos (per code or document)
    - Summary Tables
    - Paraphrases
    - Visuals from Code Maps, MAXMaps
- Use **MAXQDA Publisher** to generate:
    - HTML or PDF reports
    - Customized content by theme, actor, or time

# 15. Interpretation and Writing

- Align thematic findings with your research questions and theoretical assumptions.
- Structure your interpretation around:
    - Themes
    - Actor strategies
    - Conflicts or shifts
    - Sentiment
    - Cases
    - etc.
- Use **direct quotes and visuals** for illustration.

# 16. Transparency, Archiving, and Finalization

- Archive:
    - MAXQDA file
    - Codebook and code evolution log
    - Reflexivity notes and analytic memos
- Add **appendices** to your report for:
    - Code system
    - Coding criteria
    - Visualizations

    - Memo excerpts
- Reflect on limitations, data scope, and possible reinterpretations.