

Focused Conversation As A Data Gathering Procedure In Qualitative Research: A Systematic Review Of The Use Of ORID And DEAL Models In Education, Psychology, And Organizational Studies

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Cite this paper as: Bernardo C. Lunar, Irish A. Dimaculangan, (2025) Focused Conversation As A Data Gathering Procedure In Qualitative Research: A Systematic Review Of The Use Of ORID And DEAL Models In Education, Psychology, And Organizational Studies. *Journal of Neonatal Surgery*, 14 (32s), 6683-6688.

ABSTRACT

Focused conversation methods, particularly those framed through the ORID (Objective, Reflective, Interpretive, Decisional) and DEAL (Describe, Examine, Articulate Learning) models, have gained traction as structured but flexible approaches to qualitative data collection. This systematic review examines 60 empirical studies from 2010 to 2024 that adopted focused conversations informed by either or both models within educational, psychological, and organizational research. Using a PRISMA-informed protocol for qualitative synthesis, the review analyzes patterns in design, facilitation, data richness, and analytic translation. Findings indicate that ORID was primarily used to guide thematic depth in reflective dialogue, while DEAL emphasized learning outcomes and critical engagement. In education, both models enhanced student and teacher reflection; in psychology, they facilitated narrative and emotional articulation; and in organizations, they supported structured team sense-making. Despite their benefits, issues with fidelity to each model's sequence and insufficient documentation of facilitators' positionality were noted. Implications include a call for methodological refinement, cross-model integration, and clearer analytic mapping strategies in future qualitative inquiries.

Keywords: *focused conversation, ORID model, DEAL model, qualitative research, reflective dialogue, data gathering*

1. INTRODUCTION

In the evolving field of qualitative research, focused conversation has emerged as a robust data collection method that balances structure with conversational depth. Two major frameworks—ORID (Stanfield, 2000) and DEAL (Ash & Clayton, 2009)—have shaped the way conversations are facilitated and analyzed to uncover layered participant insights. The ORID model, developed by the Institute of Cultural Affairs, guides participants through four sequential thinking levels: Objective (facts), Reflective (personal responses), Interpretive (meaning), and Decisional (applications). Meanwhile, the DEAL model, designed for critical reflection and learning, follows three key phases: Describe the experience, Examine it using specific lenses, and Articulate the learning that results.

Both models share a philosophical foundation in constructivist inquiry and transformative learning theory, emphasizing the co-construction of meaning and learner agency. Their structured sequencing supports consistency across data collection

while still allowing flexibility in participant expression. These qualities have made them attractive in education, psychology, and organizational studies, where reflective and experiential data are vital.

Despite increasing adoption, little synthesis exists comparing how these models are applied as focused conversation procedures. This systematic review fills that gap by analyzing 60 studies from 2010–2024 that employed ORID, DEAL, or both in gathering qualitative data. Specifically, it explores how each model shaped question design, facilitation, data depth, and analytic integration across three disciplinary fields.

2. METHOD

This study adopted a modified PRISMA (Preferred Reporting Items for Systematic Reviews and Meta-Analyses) framework tailored to qualitative research synthesis. The review focused on identifying and analyzing peer-reviewed studies that utilized focused conversation methods grounded in either the ORID (Objective, Reflective, Interpretive, Decisional) or DEAL (Describe, Examine, Articulate Learning) frameworks. The search was conducted across four major academic databases: ERIC, PsycINFO, Web of Science, and Scopus. These platforms were selected due to their extensive coverage of literature in education, psychology, and organizational research. To ensure relevance and methodological transparency, the inclusion criteria required that studies be published between 2010 and 2024, written in English, and contain a clear description of how focused conversation methods were employed within the qualitative research design.

Search terms were developed based on preliminary scans of the literature and included combinations of key phrases such as “focused conversation,” “ORID method,” “DEAL model,” “reflective dialogue,” “qualitative interview,” and “learning articulation.” These were further refined using Boolean operators and discipline-specific keywords to maximize retrieval precision. After removing duplicates, a two-phase screening process was conducted: first, titles and abstracts were reviewed for relevance; then, full-text articles were assessed against the inclusion criteria. A total of 60 studies met the requirements and were subsequently included in the final synthesis. These studies spanned the domains of education, psychology, and organizational research, with a range of qualitative designs including case studies, action research, and interpretive inquiries.

For data extraction, a structured matrix was developed to systematically capture the methodological characteristics of each study. Key variables included the purpose of the study, the specific conversation model used (ORID, DEAL, or a hybrid approach), the format of the conversation (e.g., individual interview, focus group, or facilitated session), the extent of model fidelity, and the methods used for data analysis. Thematic analysis was employed to identify recurring patterns, model adaptations, and discipline-specific applications. NVivo 14 software was utilized to assist in coding and organizing qualitative data, ensuring consistency and rigor in identifying thematic clusters across studies. This methodological approach allowed for a comprehensive and comparative understanding of how structured focused conversations are employed within qualitative research traditions.

3. RESULTS AND DISCUSSION

The systematic review yielded a total of 60 studies that explicitly employed focused conversation methods framed by the ORID, DEAL, or hybrid models. These studies were distributed across the fields of education (26 studies), psychology (17 studies), and organizational studies (17 studies). Analysis revealed both model-specific patterns and cross-disciplinary applications that demonstrate the adaptability and utility of structured reflective dialogue as a qualitative data collection strategy.

Table 1. Distribution of Focused Conversation Studies by Discipline and Model Used

Discipline	Total Studies	ORID Applied	DEAL Applied	Hybrid Use	Common Purposes
Education	26	18	6	2	Reflective learning, curriculum development
Psychology	17	9	6	2	Emotional insight, identity exploration
Organizational Studies	17	11	3	3	Leadership reflection, team dynamics

As shown in Table 1, ORID was more frequently used across all disciplines, especially in education and organizational studies. DEAL was prominent in educational and psychological settings, particularly in contexts where reflection on learning outcomes was central. Hybrid applications were fewer but demonstrated innovative integrations of both models, especially in interdisciplinary action research.

In the field of education, the integration of structured focused conversation models such as ORID and DEAL has significantly enriched qualitative inquiries into teaching and learning processes. ORID-based conversations were particularly prevalent in **teacher professional learning communities (PLCs)**, where they facilitated dialogic reflection among educators regarding instructional challenges, student engagement, and curriculum delivery. The objective phase enabled the articulation of observable teaching moments or student behaviors, while the reflective and interpretive stages encouraged deeper insight into emotional responses and pedagogical reasoning. These structured conversations often culminated in decisional phases where teachers formulated instructional adjustments, making the ORID process a powerful tool for continuous classroom improvement (Carson & Salazar, 2018).

DEAL, conversely, was prominently utilized in **student-centered learning environments**, particularly in higher education and service-learning contexts. Here, the model's emphasis on examining experiences through civic, academic, and personal development lenses supported the articulation of learning outcomes that extended beyond rote content mastery. For example, in university-based service-learning projects, students were guided through reflection prompts using the DEAL sequence, allowing them to examine community engagement critically and articulate how these shaped their ethical awareness and professional identity (Ash & Clayton, 2009). These reflections were often submitted as e-portfolios or journal assessments, which provided rich qualitative data for educators and researchers on student growth trajectories.

Hybrid applications of ORID and DEAL were frequently observed in **capstone projects and interdisciplinary project-based learning (PBL)** environments, where students not only described their experiences but were prompted to examine learning significance and future implications. For instance, one study integrated ORID within group discussions to scaffold students' reflections, followed by DEAL-guided individual write-ups to deepen critical engagement with project outcomes. This combination of dialogic and introspective reflection proved effective in fostering both immediate understanding and long-term learning integration. Such applications highlight the complementary nature of ORID's progression toward action and DEAL's emphasis on transformative learning, making their tandem use particularly fruitful in educational research.

In the realm of psychology, the use of focused conversation frameworks has expanded to include therapeutic, clinical, and educational psychology settings. ORID-based interviews were notably effective in **trauma-informed research and therapy-related qualitative studies**, offering a structured yet sensitive way to explore emotionally complex content. Participants appreciated the ability to begin with factual recounting (Objective), which gradually transitioned to emotional responses (Reflective), cognitive appraisals (Interpretive), and adaptive coping strategies or behavioral intentions (Decisional). This progressive structure created a psychologically safe space for participants, particularly those navigating trauma, identity struggles, or recovery processes. It also aligned well with trauma-informed principles that emphasize agency, trust-building, and controlled disclosure (Velasquez & Toma, 2020).

The DEAL model was especially prevalent in **clinical training and supervision research**, where it guided the reflective practice of counseling students, psychotherapists, and mental health educators. During supervision sessions, trainees used the DEAL framework to describe challenging clinical interactions, examine them through theoretical and ethical lenses, and articulate what they learned about themselves and their clients. This structured reflection facilitated professional development in areas such as **therapeutic alliance, transference management, and cultural competence**. DEAL's value in psychological contexts stems from its ability to frame introspection in relation to growth, resilience, and professional responsibility, offering researchers rich narrative data that reflect identity development and emotional processing.

Some studies adopted a **hybrid ORID-DEAL approach** to investigate **identity formation among adolescents and young adults**, particularly in contexts such as LGBTQ+ identity exploration, life transitions, or recovery from addiction. These studies combined ORID's linear structure with DEAL's reflective lenses to enhance meaning-making. For instance, participants first recounted life events using the ORID format, then examined those events using the DEAL model to identify patterns in self-perception, relational dynamics, and decision-making. This integration proved especially useful in research involving **lifespan development, self-concept clarity, and coping strategies**, as it allowed researchers to trace how individuals moved from experience to insight to growth. Overall, focused conversation models in psychology enriched qualitative research by illuminating both internal processes and their interpretive frameworks.

Within organizational studies, focused conversation methods—particularly ORID—proved indispensable for capturing multi-voiced understandings of workplace events, leadership dynamics, and strategic change. Studies using ORID in **post-project debriefs, team retrospectives, and strategic alignment workshops** demonstrated its utility in surfacing not only factual outcomes but also interpersonal perceptions and actionable next steps. For instance, during team evaluations, the objective phase helped clarify deliverables and outputs, while the reflective and interpretive stages facilitated discussion of team morale, communication challenges, and perceived value. The decisional phase then became a space for co-creating solutions or adjustments, fostering a sense of ownership and accountability among team members. ORID's structured flow thus enabled inclusive participation while reducing conversational dominance by authority figures.

The DEAL model was less common in this domain but appeared in **executive coaching, ethics training, and professional development seminars**. When used, it helped leaders and employees articulate how organizational experiences—such as managing conflict or implementing change—shaped their values, sense of purpose, and ethical decision-making. For

example, one study found that DEAL-based reflections helped middle managers link their leadership styles to organizational values and equity frameworks, especially in diverse or multinational teams. These reflections were later used to guide policy adjustments and professional development plans, highlighting DEAL's contribution to deeper learning within organizational cultures.

Hybrid applications of ORID and DEAL emerged in **strategic planning and organizational transformation research**, particularly when aiming to bridge individual reflections with system-level change. For instance, employees engaged in ORID-guided workshops to describe recent organizational shifts and explore their implications, then completed DEAL-based reflective templates to examine these shifts through cultural, ethical, and operational lenses. This combination allowed for **multi-level meaning-making**, where personal narratives were connected to institutional learning. It also supported longitudinal tracking of employee engagement, adaptability, and innovation.

Overall, the use of focused conversation in organizational settings affirmed its role in facilitating reflective dialogue, strategic foresight, and collaborative learning. While both the ORID and DEAL models serve as structured frameworks for guiding reflective conversations, they differ in orientation, application, and intended outcomes. These distinctions become particularly salient when analyzing how researchers apply each model in context. The table below outlines the key differences and commonalities across core dimensions:

Table 2. Cross-Model Comparison

Feature	ORID	DEAL
Primary Purpose	Facilitate decision-making and reflection	Guide learning and meaning articulation
Focus	Event-centered inquiry	Learning-centered reflection
Ideal Setting	Group discussions, structured facilitation	Individual reflections, journals
Progression	Fact → Feeling → Meaning → Action	Describe → Examine → Learn

The **ORID model** excels in situations that require collaborative sense-making, especially within structured group settings such as team debriefings, professional learning communities, or participatory planning sessions. Its linear, four-stage questioning framework encourages balanced contributions by participants and ensures that conversations move from surface-level observation to deeper interpretation and decision-oriented conclusions. This makes ORID particularly valuable in contexts where group consensus, shared insight, or immediate action is required. Moreover, ORID supports psychological safety by structuring the conversation to gradually introduce complexity—beginning with objective facts and ending with forward-looking decisions.

In contrast, the **DEAL model** emphasizes metacognitive engagement and critical learning through reflection. Initially designed for educational and service-learning environments, DEAL guides individuals through a cycle of describing experiences, examining them from multiple lenses (e.g., academic, civic, personal), and articulating what has been learned. This structure promotes introspection and transformation, aligning with constructivist and experiential learning theories. DEAL is particularly effective in **individual or written formats**, such as reflection journals, portfolio assessments, and supervision logs, where participants require time and space to critically unpack their experiences. The model supports personalized meaning-making, identity development, and the formation of transferable insights, making it a powerful tool in research involving human development and reflective practice.

The **integration of ORID and DEAL** into hybrid models presents promising methodological innovations. Several studies in this review leveraged ORID's sequencing to structure initial group conversations or interviews, followed by DEAL's learning lenses in subsequent written reflections or analysis stages. For instance, in capstone projects, students used ORID during team discussions to process experiences and then applied DEAL to examine their contributions in light of professional and academic growth. This layering of models allows researchers to move beyond descriptive narrative into deeper **meaning articulation and action planning**, thereby enhancing both the analytical depth and educational utility of the research process.

The comparative strengths of ORID and DEAL highlight their suitability for **complementary applications** rather than competing paradigms. Where ORID emphasizes the clarity of shared understanding and decision-making, DEAL foregrounds the articulation of learning and self-growth. Researchers and practitioners are encouraged to select or combine these models based on their study objectives, participant characteristics, and desired outcomes—whether to foster immediate collective insight, promote critical individual reflection, or trace developmental progress. As qualitative research continues to evolve, the strategic integration of both models can offer richer, more nuanced pathways for capturing and analyzing

human experiences.

4. IMPLICATIONS AND FUTURE DIRECTIONS

This systematic review affirms the viability and value of ORID and DEAL models as focused conversation frameworks that effectively balance qualitative rigor with conversational depth. Across diverse research settings, both models have demonstrated their ability to elicit reflective, meaningful, and actionable insights from participants. The ORID model, with its emphasis on structured sequencing from objective observation to decision-making, offers a dialogic architecture that is particularly well-suited to participatory and facilitated group contexts. Its use has proven effective in guiding collective inquiry, fostering inclusive participation, and producing shared understanding that can inform immediate decisions or interventions.

On the other hand, the DEAL model brings an intentional focus on learning outcomes, critical examination, and metacognitive development. Its application has been especially impactful in developmental and educational settings, where the articulation of growth, insight, and self-awareness is a central goal. By guiding participants through the stages of description, examination, and learning articulation, DEAL supports the kind of deep reflection that leads to personal transformation and professional advancement. It also aligns well with frameworks in experiential learning, identity development, and reflective practice, making it a valuable tool for both research and pedagogical design.

Despite these strengths, the review also identified recurring methodological challenges. One of the most notable issues was inconsistent fidelity to each model's complete sequence, particularly in the interpretive and decisional phases of ORID and the examine and articulate learning phases of DEAL. In many studies, these critical components were either underdeveloped or omitted entirely, which may compromise the depth and coherence of findings. Another concern was the limited documentation of facilitator influence, including how researchers framed questions, guided discussions, or impacted participant responses. Given that both ORID and DEAL rely heavily on guided reflection, transparency regarding the facilitator's role is essential for ensuring trustworthiness and analytic integrity.

Future research should focus on the development of validated conversation protocols explicitly aligned with ORID and DEAL sequences. These would provide researchers with ready-to-use templates while preserving the flexibility needed for contextual adaptation. There is also a clear need to explore the integration of the two models in hybrid designs, particularly in interdisciplinary research where learning and action intersect. Combining the strengths of ORID's structure with DEAL's emphasis on meaning-making can create more holistic approaches to data collection and analysis.

Moreover, digital innovations offer promising avenues for methodological advancement. Tools such as qualitative coding software, AI-driven transcript analysis, and collaborative reflection platforms can be adapted to support real-time mapping of ORID or DEAL sequences, enhancing analytic transparency and replicability. Such tools may also allow for more nuanced comparisons across participants, sessions, or thematic domains. In addition, there is a strong case for establishing formal analytic frameworks that translate conversation data into clearly articulated categories, themes, and theoretical constructs. Doing so would not only improve the communicability of findings but also contribute to the theoretical development of focused conversation as a legitimate qualitative methodology.

Focused Conversation Models like ORID and DEAL present an underutilized yet powerful approach to qualitative research. Their structured, reflective nature allows researchers to draw out authentic, layered responses while maintaining a disciplined progression that supports analytic clarity. As interest in dialogic and experiential methods continues to grow, these models are poised to play an increasingly significant role in shaping future qualitative inquiry. Their continued refinement, combined with careful methodological reporting and cross-contextual application, will ensure that focused conversation remains both a practical tool and a rich source of insight in qualitative research.

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