Steps for Data Collection Planning:

1. **Begin by answering these key questions:** 
   1. What question do we need to answer—that is, why are we collecting these data?
   2. What data analysis tools do we envision using to display the data after we have it? (E.g. run chart, Pareto chart)
   3. What type of data do we need to construct this tool and answer the question?
   4. Where in the process can we get this data?
   5. Who in the process can give us this data?
   6. How can we collect this data from these people with minimum effort and chance of error?
   7. What additional data do we need to capture for future analysis, reference, and traceability?
2. **Keep the following points in mind when planning for data collection**:
   1. Seek usefulness, not perfection! Remember, data for improvement are different from data for research.
   2. Data recording must be easy. Try to build it in to the process under study.
   3. Use sampling as part of the plan to collect the data.
   4. Design the form with the collector’s needs in mind.
   5. Minimize the possibility of errors.
   6. Provide clear, unambiguous directions.
   7. Use existing data whenever possible.
3. **Develop your plan by answering the following questions:** 
   1. Who will collect the data?
   2. What data will be collected?
   3. When will the data be collected?
   4. Where will the data be collected?
   5. How will the data be collected
4. When you have developed a method to collect the data, **test it with a few people who will be collecting the data** and incorporate their ideas for improving the data collection plan.
5. Be aware of **the cost of collecting the data relative to the benefit** gained from having the data.
6. **Teach** all the data collectors how to collect the data correctly.
7. **Record** what went wrong during the data collection so that learning can take place.
8. **Audit the data** as it comes in for accuracy and completeness. Correct errors early.

**References:**

IHI (2004). Simple Data Collection Planning. (Boston, MA). <http://www.ihi.org/resources/Pages/Tools/SimpleDataCollectionPlanning.aspx> Accessed 29.07.2016