Best practices for note-taking at g2o

what's your next?

Prepared by:
Vikas Jangam
Design Researcher

What’s in the doc?

This doc is put together as a best practice guide to help designers and researchers at g2o to help themselves become better at notetaking. I’ve spoken to folks at g2o about their experiences and practices conducting research studies and taking notes. This doc is them, speaking to you.

Who are you?

Despite what it sounds like, the job of a note-taker is not just about taking notes.

“Think of yourself as a co-facilitator”, says Braden. In order to take useful notes, note taker needs a good understanding of the project and objectives of the study. More the awareness and context you have about the project, better you will be at your job.

“You (note taker) are the one with the richest insights [. . .] you should be able to tell who said what during the analysis” says Catey. That kind of presence is only achievable when the note taker feels equally responsible as the facilitator and is prepared and equipped to do their best possible job during the study.

“You (note taker) are the one with the richest insights [. . .] you should be able to tell who said what during the analysis!”

- Catey Corl

How will my notes be used?

For further analysis

Your notes act as data points for deeper analysis and ideation after the study by doing pattern mapping, affinity diagramming, etc.

Gathering Evidence

This is perhaps the most crucial aspect about note taking. Every insight we draw during analysis needs to be supported with evidence from the study. And your notes ARE the evidence.

Writing report

Your notes are the primary source of reference for writing the final report. Quotes, phrases used, stories users share, etc., everything that can be used to make a compelling narrative for the client in the final report has to come from your notes.

Preparing for the research study as a note taker

Know what to expect

Familiarize yourself with all the artifacts including session guide, activities and most importantly, the prototype. This is crucial for you to be able to follow through and quickly adapt to any change facilitator makes to the script.

"First of all, be clear of the goals and objectives of the study." says Catey

Think a step ahead

Work with your facilitator on the note taking template, the medium (software vs excel vs paper, etc.), coding techniques, and any short-hand notations you plan to use.

The template you use must help you capture data such that it is easy to analyze later.

Setup dry runs

Dry runs are a great opportunity for you to practice notetaking for the study. Work with facilitator, if time doesn't allow that, grab any colleague with free time to help you prep for the study.

"First of all, be clear of the goals and objectives of the study."

- Catey Corl

During the study -

Stay in the moment

As a note taker, you are expected to pay attention to in-the-moment things and not getting carried away by interpretation of what they said.

“Pay attention to what you hear and avoid diving into interpreting the stimulus” says Vikas

Be a support person

Along with taking notes you may also be in charge of managing the technology and assist the facilitator with organizing other materials.

“Make sure things are getting recorded!” says Bekka, remembering their difficult times managing the technology during an evaluative research study.

Additionally you may be also acting as the **mediator** between backroom observers’ questions and feedback to the facilitator during the study.

During the study -

Come mentally prepared!

Note taking is a demanding task. It is challenging to stay engaged and continually take quality notes, especially for beginners. Be aware that you WILL be rushed and doing a lot of things at the same time. It takes preparation and practice to become great at it. So, come prepared!

Do not be a stranger!

Do your part to introduce yourself to the participants. They probably do not want a stranger noting down everything they say, fiddling with recording devices around them. If you are not comfortable introducing yourself, remind your facilitator to do so!

Also, keep in mind that a note taker's over-participation could harm the study. You do not want the participant to be looking at you for any kind of affirmation. Avoid eye contact if you sense that you are taking their focus away from the facilitator and the task at hand.

"Don't be too hard on yourself, it's a learning process"

- Sean Barret

What’s useful to capture?

Do it your way :)

It is difficult to take away subjectivity from the act of designing. Such subjectivity is inevitable when it comes to observation and sense making. We found that every designer has their own metric for deciding what’s important and what’s not during a study. We recommend that you do the same!

But to spark some inspiration and get you started; the following section covers our best practices gathered from fellow UXers at g2o.

What's useful to capture?

Emotions, Body language, Facial expressions

We often communicate more than what we verbally express via our body language. Pay attention to the body language, it helps capture nuances like when someone's stretching out to read something – clear indicator of lack of visibility/readability. *Is there a frown?, How did they react when they saw that feature?, etc.*

We are emotional beings. Our association with a product is tied with several emotions around it. For example: Banks are about money. Each individual may have a different way of looking at money. For some it may be aspirational, for others, a necessity, and for some, an asset. *How do people feel about that particular thing?*

"Capture the silences, pauses, and the pieces in between…"

-Bekka Dennings

Attitude vs Behavior

Sometimes, people's attitude towards something might not match how they do it in practice. For example: A user might say that they really love the idea of using a money management app, but in practice, they may not be personally willing to use it.

"Observe the difference in participant's attitude and behavior and enquire why"

-Yiying Yang

What's useful to capture?

Pain points

Look for what is enabling the user and what is troubling them. Try to learn what works for them, and what doesn't. Enquire how to fix it.

"Listen to what they are saying, and what they are NOT saying" says Bekka. Try to understand the world they live in. *What delights them? What helps them?* Understand how user expects the design to work for them, understand their beliefs and disbeliefs.

Strange(err) Things

Capture things that surprise you and the ones that you find to be out of place. Such instances are good ways to understand unexpected usage of the products along with being clear indicators that user's behavior doesn't match our expectation. If you find a considerable number of discrepancies later during analysis stage, you know something needs to be addressed there!

They may use a feature in a way you wouldn't expect, or they may find workaround for a task you wouldn't imagine. Those are insightful moments you do not want to miss!

"Listen to what they are saying, and what they are NOT saying"

-Bekka Dennings

How to capture?

Type like the wind!

Now that you know what are the things you want to be looking for during the study. All you do it just keep typing! Capture verbatim as much as you can for every important thing you hear.

“When not sure if its relevant, just write it all down” says Catey. It is important to stay in the moment and keeping up with the user and the facilitator. Avoid correcting spellings and grammar. You can always go back and edit later if its important!

Capture the observations, not the interpretations

We tend to overemphasize things which strike a chord with us. Avoid such such bias while note taking! Simple advice is to write down everything that strikes are useful - in verbatim, and not your interpretation of it.

“Type like the wind!”

-Kelli Ciola

Good note vs bad note

Give me the context

As you capture everything in verbatim, make sure to add enough context to it. Ensure that your note is interpretable and isn't misleading, especially when you are paraphrasing the sentences.

“People from your team should be able to comprehend the notes without your help”, says Vikas.

Examples:

NOTE: *“I agree”*
CONS: This note completely lacks context, making it useless.
CORRECT: **“I agree @question5”**

Example 2: *”I usually press that button”*
CORRECT: *“I usually press that button* [Start]”

Do not forget the WHYs

One of the rookie mistakes while note taking is while you do a good job at capturing what the user says or does, you may not pay attention on why the user believes so or does so.

Learning users' intentions and beliefs (whys) behind their actions (whats) is equally important thing while note taking.

Example:

User - “I hate color red”

You – “Oh, interesting. why's that so?”

Pro-tools for notetaking

Using Codes

Coding is one of the most common practices at G2O for taking notes. If your facilitator wants you to use this kind of a template, this section should help you get started. Our advice is to sit down with your facilitator to help you learn how to use this template.

- Coding is basically an organized method of taking notes on an excel sheet using tags which make the data - filterable.
- This eases finding patterns and deeper analysis.
- Each row is basically a unique data point (like a quote, or a phrase, or an observation, etc.) along with other defined attributes like , username, activity number, time stamp, tags etc.
- These attributes are typically used as filters to see data in desired groupings.

	Person	Notes	Code
1	Person	Notes	Code
2	Ryan Gilbert &Christopher ross	im the laison for the finance group. Budget perspective, when we analyze in store tests, diff pricing. We are tying to	Our role, our goal
3	Ryan Gilbert &Christopher ross	WE don't relate to the lader plan. We work closely with the	Our role, our goal
4	Ryan Gilbert &Christopher ross	They do more of a bottoms up plan in planning - they have	Our role, our goal
5	Ryan Gilbert &Christopher ross	We have the top level view - from the top down, independent	Our role, our goal
6	Ryan Gilbert &Christopher ross	When we move intto the quarter we will look at how q4	Our role, our goal
7	Ryan Gilbert &Christopher ross	3-5 year historical seasonalities, based on q4 we will d biill	Our role, our goal
8	Ryan Gilbert &Christopher ross	There is a lot of seasosnality in the business and we will look	Our role, our goal
9	Ryan Gilbert &Christopher ross	The merchants will be more bullish on the busienss - yeah we can sell more of those. But Not everyone will be able to	Our role, our goal
10	Ryan Gilbert &Christopher ross	daily sales forecast - every day we have a POV on what sales	What we do with data
11	Ryan Gilbert &Christopher ross	It's created on thursdays to say what we have a view for the	What we do with data
12	Ryan Gilbert &Christopher ross	we have our daily forecast and then each day of the week we move it to actualized numbers - we're looking at variances	What we do with data
13	Ryan Gilbert &Christopher ross	If I'm missing sales, that's when I really dig in. Then I look at what category is driving that miss. What was that related to?	What we do with data
14	Ryan Gilbert &Christopher ross	Then we'd reach out to some merchants, then suggest and	What we do with data
15	Ryan Gilbert &Christopher ross	historically, businees is really consistent on teusday and weds,	What we do with data
16	Ryan Gilbert &Christopher ross	Based on the most recent sales trends	What we do with data
17	Ryan Gilbert &Christopher ross	We will look at WTD comps by category. If one particiular Div is dropping we talk about that in the meeting. Then we discuss what we are doing to sell those and if we think the trend will	Weekly finance meeting
18	Ryan Gilbert &Christopher ross	finance forecast - then the PL170 merch forecast - then the	Weekly finance meeting
19	Ryan Gilbert &Christopher ross	the information we collect does not make it all the way down	Weekly finance meeting
		We discuss a lot of this based on gut feel. It's a discussion. Liz	

A sample coding template.

Using Codes

Notes + your thoughts/comments

Talking to Catey revealed a few techniques she uses as an add-on to her coding sheet. The green column you see on the right is a brilliant way of separating out your thoughts from the observation. Also acting as a space for noting down reminders and follow-up questions, afterthought, interpretation etc.

1	Person	Notes	Code	My Thoughts
2	Ryan Gilbert &Christopher ross	im the laison for the finance group. Budget perspective, when we analyze in store tests, diff pricing. We are tying to understand the finacial impacts of those decisions.	Our role, our goal	Why did he say that?
3	Ryan Gilbert &Christopher ross	WE don't relate to the lader plan. We work closely with the ladder plan	Our role, our goal	
4	Ryan Gilbert &Christopher ross	They do more of a bottoms up plan in planning - they have 200 palnners that have their plans	Our role, our goal	
5	Ryan Gilbert &Christopher ross	We have the top level view - from the top down, independent	Our role, our goal	
6	Ryan Gilbert &Christopher ross	When we move intto the quarter we will look at how q4 business played out	Our role, our goal	They seem to plan things quarterly
7	Ryan Gilbert &Christopher ross	3-5 year historical seasonalities, based on q4 we will d biill into that. Are we comfortable with that?	Our role, our goal	
8	Ryan Gilbert &Christopher ross	There is a lot of seasosnality in the business and we will look at that and build that up	Our role, our goal	
9	Ryan Gilbert &Christopher ross	The merchants will be more bullish on the busienss - yeah we can sell more of those. But Not everyone will be able to maximize their sales, so we help provide some guardrails on what they are doing	Our role, our goal	
10	Ryan Gilbert &Christopher ross	daily sales forecast - every day we have a POV on what sales are going to be	What we do with data	
11	Ryan Gilbert &Christopher ross	It's created on thursdays to say what we have a view for the week	What we do with data	Followup with AJ on weekly reports.

Paraphrasing/Acronyms

Depending on the nature of study, there might sometimes be a need to capture too much data. In such cases, planning on usage of acronyms and a standard way of paraphrasing could save you a lot of efforts.

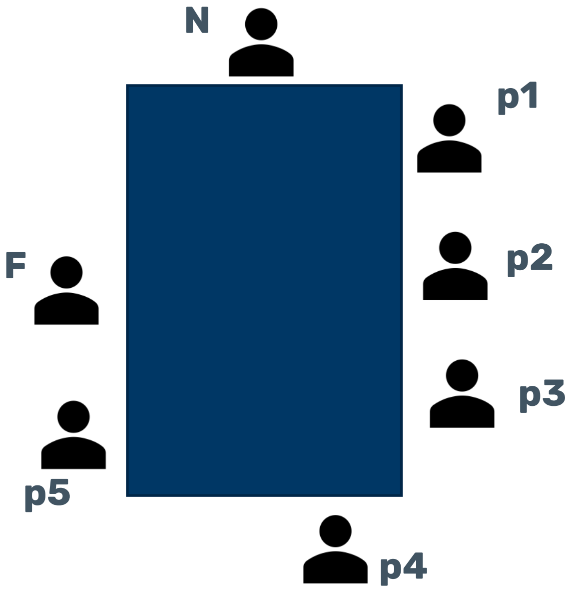
Example: F – Finding, R – Recommendation , u1, u2, u3, - users

Too many people to remember? (*Too Fast Too Many. Vroom vroom!*)

When there are 3 or more people to keep track of during a study, try out this technique Catey shared with us. Assign a tag for everyone in the room. It could be their initials, role, or simple p1, p2, p3 etc .for participants.

This techniques saves lots of time and efforts as the note taker can easily tag each note to the person who said it.

Example:
F – Where did you find the option?
P2 – It’s right there
P3 – I could not see it



All the best!

Hope this guide was helpful! Reach out to me at vjangam@meetclutch.com if you have any further questions!

-Vikas Jangam

P.S. This was a short-hand version guide for note taking, ideally suited for someone who's pulled into the study on the last few days as a note taker.

Keep reading if you want to go pro!

More pro tips

Involve note taker right from the start

Statement of work gets approved.

Plan

Stakeholder alignment

Research plan

Recruit users

Involve note taker from here.

Build Session Guide

Build backroom activity guide and session guide based on the research plan

Last stage to bring in note taker!

Build Note taking template

Note taker builds a note taking template based on session guide.

Dry Runs

Note taker and facilitator practice dry runs using the materials.

Final study

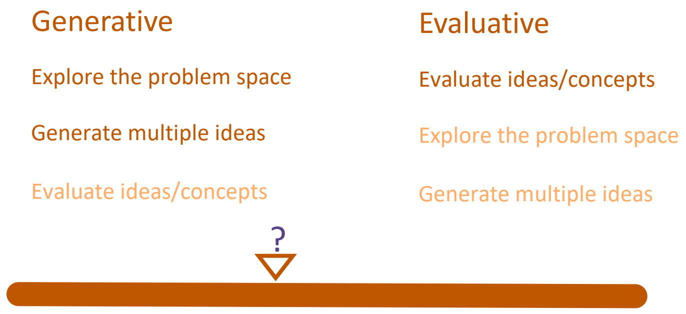
The note taker needs to be brought into the project as early as possible. Usually they are helping facilitator plan and execute the study and at different stages they learn more and more about the project and finally build a note taking template which works for them and the facilitator.

Understand the scope of the study

Depending on the study

Most of the studies we conduct at g2o range from Generative study to an Evaluative study. The scope of how well and in what ways your notes will be used depends on scope of the study. Typically, a Generative study is most explorative in nature, the objective is to generate many ideas and insights for solving a problem and creating new opportunities. An Evaluative study slightly leans towards fact checking and evaluating an idea or a product.

Keep in mind that we always ask the "Why's" and think of several other ways of solving a problem and creating new opportunities no matter where the study falls on the spectrum. Time and scope of the project determines what we choose to present to the client supported with evidence and concrete action items.



Analysis and drawing insights

Your notes act as data points for deeper analysis and ideation after the study by doing pattern mapping, affinity diagramming, etc.

Building a note taking template

Structure your Note taking template according to the goals of the study, what you need to deliver, and what kind of analysis you want to do later.

The template should be designed such that it reduces post study-analysis time for the team.

The medium could vary from using a structured excel sheet, to using Lookback or similar software or good old pencil and paper depending on the goals of the study.

During the study – More Do's and Don't from Pros

Be involved

Like said before, think of yourself as a co-facilitator. Be involved through out every discussion that happens in the study room and the backroom.

"I write for myself a quick summary of every participant after each study. ."says Sean talking about how he stays abreast of everything that's happening during the study.

After each study and at the end of the day, sync up with the facilitator and exchange your insights and thoughts.

The skill of following up

Communicate with your facilitator on how and when to ask follow-up questions you have or the ones backroom may pass on to you. It can be challenging at times to remember the piling up follow-up questions while you wait for the right time to ask, whilst taking notes. So, have a separate sheet to write them down!

"Write down things you want to follow-up so that that you can go back and do so"

Catey Corl

During the study – More Do's and Don't from Pros

Be a dispassionate observer

Like said before, it is very important to filter out your own biases towards the study and observe and write down dispassionately. Our biases strongly influence what we see and how much we emphasize on it. It is important that we consciously avoid doing that. *Additionally, if you are involved in designing the prototype, such biases could be more subconscious and difficult to catch!*

"Anything you root for without factual evidence is basically a bias. Write them down as a hypothesis before the study. This will help you to stay unbiased about those topics during the study" says Vikas.

Seek Feedback

In between the sessions, ask the facilitator for feedback on how you are doing and if they find your notes useful.

"I would talk to my note taker after each session and tell them what they are doing good and need to do more", says Braden

"Go back to the audio recordings for the second or third time and you will start hearing things very differently"

-Bekka Dennings

Good Reads:
An article about Strong Objectivity
https://msu.edu/~pennock5/courses/484%20materials/harding-standpoint-strong-objectivity.pdf

book about observation and biases everyone has
https://www.goodreads.com/book/show/15803166-on-looking

https://www.goodreads.com/book/show/6332526-inside-of-a-dog

During the study – More Do's and Don't from Pros

Debrief after sessions

Debriefing after each session is an effective way to make sure everyone stays on the same page. Note taker should be involved in these sessions as it will help them better understand what to seek out for in the future sessions

Seek Feedback

In between the sessions, ask the facilitator for feedback on how you are doing and if they find your notes useful.

"I would talk to my note taker after each session and tell them what they are doing good and need to do more", says Braden

Capture more than just notes!

Depending on your comfort level, also capture process pictures during the study (with prior consent from the participants, of course). They add a lot more value and context to your notes. During ethnographic studies, it is a given that you are capturing as many pictures as possible. But do not limit yourself when it comes to in-lab studies.

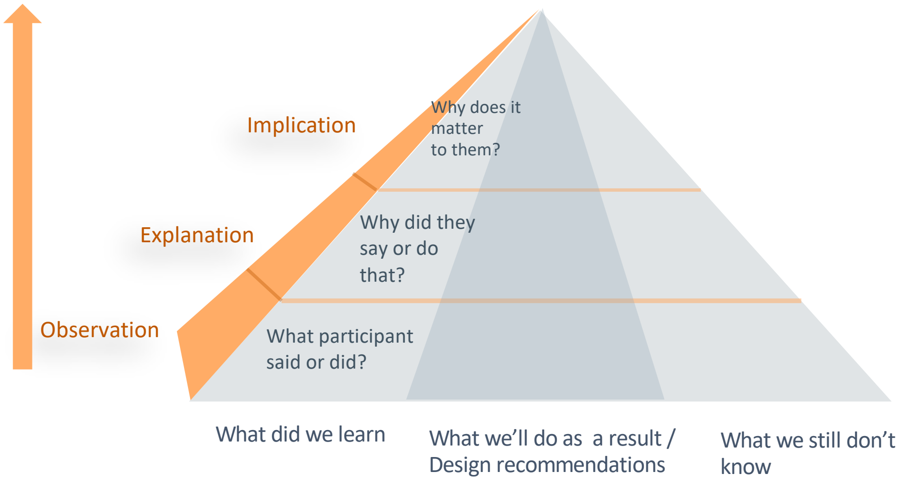
"Go back to the audio recordings for the second or third time and you will start hearing things very differently"

-Bekka Dennings

Analyzing the notes

This Pyramid depicted by Catey is a simple yet power representation of how notes are used to draw insights and further the research.

We start from the bottom, asking “what did the participant say?”, they we try to understand why they did it that way. And we try to understand why that is important to them, they underlying beliefs and mental models.



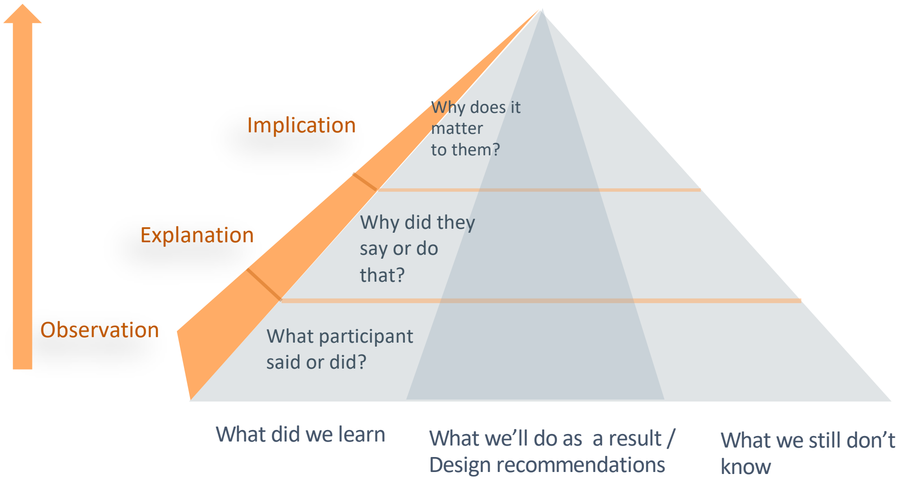
One observation at a time. . .

Books and literature

Analyzing the notes

This Pyramid depicted by Catey is a simple yet power representation of how notes are used to draw insights and further the research.

We start from the bottom, asking “what did the participant say?”, they we try to understand why they did it that way. And we try to understand why that is important to them, they underlying beliefs and mental models.



One observation at a time. . .