

By [Ankitha Bharadwaj](#)

Nailing down note-taking methods is like the white whale for user researchers. I'd like to share with you a few ways we at Blink have gotten a few steps closer to bagging that whale.

In this series of blog posts I'm going to share our tips and tricks for how to best accomplish notetaking while moderating research sessions.

Research project teams at Blink typically consist of the PM, a director, the client relations manager, and of course the researcher. When it comes down to the nitty-gritty work, it's up to the researcher to get their ducks in a row to deliver the goods. With only one researcher at the helm, they must manage everything from interview guide development, session moderation and note-taking, and of course analysis and reporting.

If you ask any researcher what their preferred note-taking method is, chances are they'd say having a dedicated observer/note-taker is the best way to go. This allows the researcher to fully immerse themselves into the interview instead of allocating physical and mental resources to take notes. But alas, such a pretty dream can seldom be realized.

At Blink, the researcher has to handle both moderation and note-taking, so we need to be judicious in how we get the most out of an interview without sacrificing data integrity. One of the big questions in our field is whether session notes should be taken on a computer or on paper. The answer is, [it depends](#).

Cue chuckles from the user researchers in the audience.

The whole point of taking notes is to make sure the important observations, takeaways, and verbatims from each session are captured for future analysis and reporting. How a researcher pulls that off is largely dependent on **the what** (the experience she's researching), **the where**

(the environment of the session), and **how long** they have for analysis and reporting.



Blinkers recruit participants for a study to help the Seattle Sounders

The “What”

The note-taking method might depend on what the researcher is studying and what the output looks like. If they are engaged in a usability study where the stakeholders are interested in precision (i.e., time on task, task success, etc.), the researcher might opt for digital notes. Taking notes on a spreadsheet would help the researcher standardize how they are taking notes so there isn't a lot of ambiguity when developing the outputs.

Typing session notes might also make sense when conducting usability studies (as opposed to more interview-focused studies) because the researcher is more likely able to observe participant behavior and type at the same time (assuming proficiency in typing, of course). Otherwise the researcher would have to look away from the participant for large chunks of time to look down at the paper to write notes.

The flipside of typing your notes is handwriting them. Writing by hand has long been heralded as [a great way to internalize content](#). The action of putting pen to paper and physically writing words down is scientifically proven to improve memory retention and recall. In the user research field, writing notes by hand has the additional benefit of being a first layer of analysis. The researcher makes the conscious decision to make a note of something, instead of blindly typing anything and everything the participants says or does. This greatly reduces the amount of noise in the data.

However, handwriting notes can get unmanageable very quickly. If the researcher isn't carefully managing the notes they can be difficult to use during analysis. With issues like hand fatigue during a session or potentially bad handwriting, the researcher might get into a pickle. Another consideration to keep in mind when handwriting notes is how it might tip off the participant about what is being researched. The participant might clue into when you look down and handwrite and might subconsciously begin to alter behavior or feedback to match what they think the researcher is interested in.



Blinkers conduct a field study for Microsoft Kinect

The “Where”

At Blink, we do a variety of research projects ranging from highly structured eye-tracking lab studies to more ethnographic field research. The study environment plays a role in the note-taking method we choose.

Field research

For field research, we find that paper and pen is often the best way to go for a few reasons:

- The researcher has to be mobile and able to move around as the situation requires. This becomes cumbersome when using a computer for note-taking. The researcher can't

guarantee they will be able to sit down or have access to an outlet in case the battery runs low.

- The purpose of a field study is to observe the participant in a particular environment. Emphasis on “observe.” This means the researcher should spend more time paying attention to the participant and their behavior, rather than taking detailed notes. A piece of paper to jot down thoughts is typically sufficient.
- Field studies are usually less structured and may require the researcher to go “off script.” The freeform nature of a piece of paper is sometimes the best way to capture notes. Being able to quickly draw a diagram or annotations to existing notes make writing notes by hand the recommended method for field studies.
- Being contextually embedded in a participant’s environment means being as minimally intrusive as possible so the researcher can observe the participant in the most natural state. The clickity clack of a keyboard might jog the participant out of their natural state of being and act as an additional reminder that they are being observed.

The combo method for field research

There is another method of note taking we haven’t gotten into yet – a combination of digital and handwritten notes. There are a few tools out there that researchers use to leverage the ease of handwritten notes with the efficiency of digital notes.

Products like the [Livescribe digital pen](#) allow researchers to take notes by hand and can simultaneously capture them digitally ([we did a review of it here](#)). The Livescribe also captures audio, which is an added benefit for researchers as they can playback what a participant said while the researcher wrote down a particular note. There are also tablet devices like the iPad and styluses like the Pencil. These are becoming increasingly popular for researchers to get the best out of both worlds.

However, when it comes to field research the classic clipboard, paper, and pen combination is often hard to beat. Fancy devices like the iPad might be a liability; there’s always the concern of dropping an expensive device or needing to charge it in the middle of a session. And not to mention that writing on a tablet device is still a bit kludgy. And as for the Livescribe scenario, the pen requires a proprietary type of paper to work which might be an unnecessary amount of overhead to maintain.



Blinkers conduct a study in the Seattle labs

Lab research

Running sessions in a lab environment allows the researcher to get away with a lot. Though we always strive to keep the situation as naturalistic as possible, it’s easy for participants to be forgiving and not get hung up on the logistics of data collection.

The participant has entered a testing environment of their own volition and are amenable to the idea of a researcher using a computer to capture notes. The participant already has cameras and other equipment pointed at them, so it’s not a big stretch to accept a researcher’s computer.

Most researchers at Blink opt for a computer to take notes in lab sessions because it boils down to being the easiest way to document and track findings in an efficient way. We often have a handful of days to produce a findings report to stakeholders, so we don’t have the luxury of skimming through pages of near indecipherable text.

The “How long”

The fidelity of data needed for the project output might also affect how the researcher takes notes. If the outputs require a high level of specificity, it's probably better to go with a computer for note-taking. The command+F shortcut to search through typed notes is a researcher's best friend when there's a topline report due in eight hours.

And let's not forget speed. Most of us are much faster at typing than handwriting, which allows us to quickly capture verbatims while still being engaged with the participant. Most studies produce 15+ hours of interview footage. Aint nobody got time to re-watch all of that to find a few quotes.

As a UX researcher you have a lot on your plate when it comes to study planning and data analysis. Ensuring you have the proper note taking method can take a lot of the stress out of your overall project and result in organized information that can help you give better recommendations to your stakeholders.

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