# Observing remote user research and taking notes

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| This guide explains the role and responsibilities of observers during user research sessions within Service Transformation.  [Browse our collection of user research templates and guides](https://github.com/essexcountycouncil/ur.templates-and-guides/)  [Give your feedback](https://forms.office.com/r/kCKSzv91SP) and help us improve this guide. |

## How we observe research sessions

We will be taking notes together and your participation is helpful and welcome.

### Before the session

Before going into the session:

* read the discussion guide to understand the aim of the research and help you decide what note to take
* read the guide on note-taking – the quality of your notes will influence our data analysis

### During the session

During the session, please turn your microphone and camera off.

Make a note of any questions you’d like to ask the participant. Near the end of the session, we will ask you if you have any questions. You can then turn on your camera and mic and ask them. You may also post a question in the chat.

### After the session

At the end of the session, we will compare notes and discuss what we have observed.

## Note-taking instructions

The [GOV.UK Service Manual](https://www.gov.uk/service-manual/user-research/taking-notes-and-recording-user-research-sessions) has detailed information on taking notes and recordings in a variety of contexts and phases of research.

When taking notes, you should:

* choose a tool you are comfortable with
* capture the key points - if you miss a key point, make a note of the time and we can check the recording later
* make as many notes as you can - you do not have to capture everything, but something you do note might be valuable later
* aim to make one observation per note so we can move and group observations after the session
* be concise and exact so we can action the note at the end of the research
* keep your notes impartial - be open minded and avoid coming in with preconceived ideas
* do not include anything that could reveal the participant’s identity such as their name or location
* add your notes to the project spreadsheet or online whiteboard either during or straight after the session

Sticky notes can be a good way to capture snippets of information. The Government Digital Service (GDS) has written about the [anatomy of a good sticky note](https://userresearch.blog.gov.uk/2014/10/29/anatomy-of-a-good-sticky-note/).

## Observations during interviews

# Observation involves paying careful attention to what you’re seeing and hearing.

# You should look for:

# what people do - processes, tasks, tools, problems and barriers

* how people think - their goals, triggers, choices, reasons, knowledge, and gaps
* how people feel - their motivations, reactions, fears and frustrations

## Usability testing

Usability testing looks at how a website or other product works by testing it on a user. There are several observations you can make when watching the participant.

Unintended mistakes such as:

* she skipped the ‘city’ field on the address form
* he didn’t click ‘save’ before closing the window

## System errors and error messages such as:

* the menu didn’t drop down the first time she clicked it
* error message: “Database error on line 55”

Click-paths (navigation sequences) can be especially helpful. Track the individual steps a participant takes to reach a specific goal such as:

* *Home > New Car > Vehicle Type > Back > Model > Back* (looking for “vans”)
* searched “ford truck*” > Ford.com > Trucks & Vans > F-150 > Models*

## Strategies and tools the participant uses such as:

* he said he always chooses two items because shipping costs less
* she chose “about us”and said she was looking for “contact us”
* he used a calculator and Google Maps, then entered the data into the desktop app

Search terms and results such as:

* search 1: lexis (nothing useful)
* search 2: lexus (correctly chose 3rd result)

## Quotes such as:

* “This is great!”
* “I expected this to work like Amazon.”

You should make a note of:

* anything that seems overlooked, misunderstood, ambiguous or confusing
* suggestions, questions and comments (including your own)

*Observer guidelines adapted from Nielsen Norman Group*, used by permission. Original: [nngroup.com/articles/observer-guidelines](https://www.nngroup.com/articles/observer-guidelines)

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