

Journaling

»A Method To Document Experience Of Design Researchers & Participants Alike.«

NUMBER OF PARTICIPANTS	FACILITATORS	CATEGORY	DURATION	LEVEL OF DIFFICULTY
Up To 100	1 Designer, 1 Researcher minimum	Empathize Phase	30min - 2h	Simple

Description

There are two types of journaling methods:

- ▶ the first is the kind a researcher asks a participant to keep when engaging in an activity or service;
- ▶ the second is the kind of journal a designer or researcher uses to take detailed notes in the field

Both can be useful in design research because they document experience over time.

In the first type of journaling methods, researchers ask a participant to fill in a journal to capture their thoughts and feelings about an activity or service over time. In this case, the journal is like a diary or blog that the participant contributes to on a frequent basis, and can provide insights into the participant's perception of the activity. They can be paper, but most often today are digital and capture activity in the moment of engagement.

Asking participants to capture their own thoughts and feelings is useful for gathering information participants might not otherwise share about what they really think and feel. This is useful, subjective, self-reported information.

In the second type of journaling methods, designers or designer researchers often use journals to record activities in the field during a session of Participant Observation/Field Observation/Cultural Inventory/Touchpoint & Artifact Analysis. Note-taking can be free form or guided by templates.

The "record activities in the field" method is good for gathering information about experiences in the field and the locations that are part of those experiences. A written record of data points and notes helps commit information to memory and is useful for analysis and synthesis later. The record can be supplemented with sketches, photos, audio recording, and video recording.

Materials

- ▶ For journaling by participants, you can use either one of the following:
 - ▶ Paper notebooks containing instructions and prompts already included
 - ▶ Google Form. This would work for daily entries or for tasks that can be completed and reported on in a single attempt
 - ▶ Google Docs/Sheet to capture data over a longer period of time, since it is more flexible to give/lock access to participants for certain date entry. Thus, you can have a more open, on-going conversation with participants
- ▶ For journaling by designer/researcher, you can use either one of the following:
 - ▶ Paper notebooks with existing template or open format
 - ▶ Google Docs for collaborative data collection and the ability to supplement with sketches, photos, audio & video recordings
 - ▶ Miro for the similar reason as Google Docs and with visual arrangement so it is easier to be used during synthesizing with Affinity Diagram method.

Preparation

For journaling by participants:

- ▶ First of all, you must specify what is the purpose of the journaling method study, data you want to collect, and the number of participants depending on the size & time allocation of your study.
 - ▶ Prepare the journal tool with the data you want to collect
 - ▶ Recruit participants by creating a screening survey
 - ▶ Conduct a pre-study by testing your tool with participants. Careful preparation can mitigate the risk, but people are endlessly creative in the ways they interpret instructions and it is generally advised to run a pilot test on all tasks and then over-recruit to ensure an adequate final sample size.

For journaling by designer/researcher, you need to do step 1-2. After that, you practice making entries. If you are comfortable with the technique you can implement it on Participant Observation/Field Observation/Cultural Inventory/Touchpoint & Artifact Analysis

Step-by-Step Instructions

1. When pre-study has been conducted or any adjustment necessary has been made, distribute journals to participants or researchers & start research

2. If other data collection is done (photos, audio recording, video recording) note in the written journal where in the process this data was collected
3. Journal entries need to be monitored on a daily basis to ensure you are able to respond to questions by participants. Additionally, try to probe for more detail whilst the entry is still fresh in their minds.
4. As soon as data from the participants/researcher starts to arrive, it can be analyzed through Affinity Diagramming. You're essentially looking to identify high-level patterns across the full data set. See if you can find insights across multiple people, and compare those to demographic data.
5. Share insights of what you learned to others, for example teammates, your manager, or friends. Often you will need to create a lengthy report or presentation to walk everyone through the design, method, and outcome of the study.

Remarks, Tips, Limitations

- ▶ Remind participants who are keeping journals to contribute to them regularly. Encourage them to add sketches, photos, images, etc if they want.
- ▶ Remind researchers in the field to differentiate between recording what they observe and their opinions/conclusions about what they observe. Both are valuable.

References

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