NOTETAKING, TRANSCRIPTION & ORGANIZING DATA

PRESERVING INSIGHTS FROM INTERVIEWS

EGC // LPA

Taking good notes and accurately transcribing interviews are essential parts of collecting data. This guide gives tips for both methods, explains when to use each, and then shares data organization methods to prepare you for analysis.

When to Use Notetaking vs. Transcriptions

Notetaking: Notetaking is a versatile approach suitable for capturing key insights during interviews when a comprehensive verbatim record isn't necessary. You'll need to jot down high-level notes during each interview and allocate 15 minutes to record your perspectives and key themes afterward. It works well for informal coding, where you aim to identify overarching themes quickly. Use notetaking when:

- You want to focus only on capturing the main ideas, key points, and initial observations.
- You're comfortable with paraphrasing and summarizing interview responses.
- You want to supplement transcriptions with interviewer perspectives and nonverbal cues.

Transcriptions: Transcriptions provide a detailed, word-for-word record of interviews and are particularly valuable for robust coding and in-depth analysis. They are also an excellent choice for interviewers who prefer not to be distracted by taking notes. Cleaning up transcriptions using AI transcription software typically takes 15 minutes for each hour-long interview. If you transcribe manually, expect it to require three hours for every hour-long interview. Opt for transcriptions when:

- You desire an accurate representation of exactly what the interviewee said.
- You'll be utilizing robust thematic coding to analyze the data
- You want to be able to use exact quotes in your reporting.
- You do not want to have to take notes during an interview.

Combining Notetaking and Transcriptions

Combining notetaking and transcriptions can offer a well-rounded approach that leverages the strengths of both methods. Consider these strategies for effective integration:

Hybrid Approach: Begin with notetaking to capture initial insights during the interview. Later, supplement your notes with transcriptions for in-depth analysis of specific sections.

Focus on Key Moments: Use transcriptions to analyze responses to the questions most integral to your report.

Synthesized Summary: After conducting notetaking and transcriptions, create a synthesized summary combining your notes' main ideas with selected verbatim excerpts from transcriptions for the questions you determine as the highest priority.

Notetaking Step-by-Step

1. **Prepare:** Review your interview questions and objectives beforehand for a clear focus.

2. **Use a Template:** Use a standardized format that's easy to follow for each interview. This is especially true if you have a team helping conduct interviews.

3. **During the Interview:** Listen intently and jot down key points as the interviewee speaks. Only try to capture some words; focus on the most relevant details. Use direct quotes sparingly for impactful statements.

4. **After the Interview:** Take 15 minutes directly after the interview to capture your observations while they're fresh:
    a. **Salient Points:** Record what stood out to you most during the interview as it related to the purpose of your project.
    b. **Highlight Patterns:** Take note of recurring themes, insights, or sentiments.
    c. **Emotional Tone:** If relevant, record the interviewee's emotional tone, as it can add depth to your notes.
    d. **Non-Verbal Cues:** Mention significant non-verbal cues like body language, facial expressions, and gestures. Was the person excited and engaged? Hesitant and guarded?

Transcriptions Step-by-Step

We highly recommend using transcription software or a service that can significantly enhance the results while requiring the least time. Many E-Teams like using **Otter.AI** because it is easy to use and has excellent results at a low cost. The pro plan costs $10/month per user and should suit most Listening Tour needs. While the software captures most of the conversation, you will still need to spend about 15 minutes per hour-long interview reviewing the transcription to edit for accuracy.

There are also human-based transcription services that are more costly but have the most accurate transcriptions. **Rev** is a highly trusted option that costs $1.50 per minute of audio. These services are helpful when transcribing audio recordings that are hard to interpret, such as a recording with lots of background noise or someone with a strong accent.

You can also go old school and transcribe audio recordings yourself. But be warned, it takes three times the interview time to transcribe on average. That means you'll be spending 3-hours transcribing every hour-long interview. The tremendous person-hour investment is the reason that most people choose to use software to assist.

If you are using Otter.AI, we recommend reviewing their user guides, but here is a quick list of the steps you can expect to take:

1. **Choose the Right Plan:** Select the plan that suits your transcription needs.

2. **Ask Permission:** Always ask the interviewee if it's okay to record them and let them know how the transcription will be used.

3. **Collect Clear Audio:** Use a good-quality recording device to capture clear audio with minimal background noise.

4. **Upload to Otter.ai or Set to Automatically Upload:** Sign in to your Otter.ai account and upload your audio recording for transcription. Otter is also able to transcribe Zoom meetings and cloud recordings automatically.

5. **Speaker Identification:** Turn on speaker identification and assign labels to each speaker for accurate attribution.

6. **Edit for Clarity:** Correct grammatical errors or unclear transcriptions after the interview to ensure readability. Otter sometimes has trouble with Bible verse references, proper names, and some church-specific terms. We recommend editing right in Otter (as opposed to downloading and editing in a Word doc) because Otter uses AI to learn and incorporate your edits into future transcriptions.

7. **Export to the proper document:** This will most likely be to a Word document titled by the person's first and last name or to the master data spreadsheet.

Organizing the Data

Effective organization sets the stage for a smooth analysis, ensuring you can easily access and make sense of your collected data. Once your transcriptions or notes are complete, the next step is to organize them and prepare them for analysis. You can find detailed guidance on this process in our analysis guide. Regardless of the chosen approach, it's crucial to create file backups of all documents and assign clear names for easy retrieval.

Here are our recommendations for different scenarios:

Informal Group Theming: If you're working in a team, gather all note sheets into a shared folder accessible to all members. Before your team meeting to discuss themes, individually review your note sheets and compile a brief list of common themes that emerge across multiple interviews.

Individual Informal Theming: If you're conducting informal theming alone, consider storing all your notes in a single master document. You might prefer using a spreadsheet format, such as the master spreadsheet template in the "Robust Coding" section. Alternatively, you can copy themes from individual notes into one comprehensive Word document.

Robust Coding or a Hybrid Approach: Meticulous organization is vital for comprehensive coding, especially when using AI or qualitative analysis software. We suggest adapting the Master Spreadsheet Template provided for your interview questions. Create separate columns for responses to each question, interviewee information, and interviewer notes.

If you have any questions or feel your Evangelism Team would benefit from a one-on-one conversation about the ideas in this resource, please email us at eteams@palau.org. Our team is here to support you!