



TOOLKIT for Making Written Material Clear  
and Effective

SECTION 3: Methods for testing written material  
with readers

## PART 6

How to collect and use feedback  
from readers

### Chapter 12

Should you do audio or video recording of  
your sessions?

U.S. Department of Health and Human Services  
Centers for Medicare & Medicaid Services



## TOOLKIT Part 6, Chapter 12

### Should you do audio or video recording of your sessions?

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This document is the twelfth of 19 chapters in Part 6 of the *Toolkit for Making Written Material Clear and Effective*. The Toolkit has 11 Parts. It was written for the Centers for Medicare & Medicaid Services (CMS) by Jeanne McGee, McGee & Evers Consulting, Inc. The guidelines and other parts of the Toolkit reflect the views of the writer. CMS offers this Toolkit as practical assistance to help you make your written material clear and effective (not as requirements from CMS).

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## Introduction

When you are planning your feedback sessions, you will need to decide what approach to use for summarizing participants' reactions to the written material. For many projects, you can do just fine by relying solely on written notes, especially if you take a few minutes to review and expand on them immediately after each session. Using a Session Summary Form to write down highlights of the interview is also very helpful (see previous chapter for details).

While you should count on taking notes to summarize results from your feedback sessions, you may want to consider supplementing your notes by recording the sessions (with participants' permission, of course). Recordings give you a more complete record of feedback than notes alone can provide, and they can be good tools for sharing the results with others and improving your interviewing skills.

If you are considering making recordings, there are important factors to consider, including how participants might feel about being recorded, as well as the added cost, especially if you produce written transcripts from the recordings you make. To help you decide whether audio or video recording makes sense for your project, this chapter discusses the potential benefits and costs, as well as other issues to consider.



## Should you do audio recording of your sessions?

Figure 6-12-a below outlines the potential benefits of audio recording and factors to consider in making your decision.

**Figure**

6-12-a. Should you do audio recording of your sessions?

Here are several possible benefits of making audio recordings:

- **You can use the recording to improve your written notes and refresh your memory.**

Having a recording makes it easy to review the session and make additions or corrections to your notes.



- **You can use the recordings to share the feedback with other people.** When you are analyzing and reporting your results, you can pull out quotations from the recordings and use them as examples, either in written form or as audio clips. Quotes from your feedback sessions can be a powerful tool for showing and convincing people about changes that need to be made in the written material. If you want to, you can create a full transcript from the recordings.
- **You can use recordings as tools for training and skill development.** Listening to recordings of feedback sessions can help people learn how to conduct feedback interviews and give them a way to practice taking notes. If you're an experienced interviewer, listening to recordings can help you hone your skills.

Here are things to consider:

- **Recording might make some participants feel uncomfortable or inhibited.** If you plan to record a session, you need to get people's permission in advance. You will probably find that most of your participants are willing to be audio taped, especially when you explain how the tape will be used. If not, you can skip the recording and just rely on written notes.
- **Audio recordings cannot capture the visual aspects of written materials.** Whether this is a serious limitation or not depends on how you plan to use the audio recordings:
  - **If you are using audio recordings for enhancing your notes or analyzing your feedback, it is often quite limiting to have only the audio part of the interview.** If you don't know what a reader is looking at, it is frustrating to listen to an audio tape of an interview and hear the reader say, *that part is really confusing*, or *I wonder why they did this?* Interviewers can help compensate for this problem by phrasing their own remarks with the audio recording in mind. For example, instead of saying, *What's confusing about*

*it?*, they can say, *What's confusing about this top part of page 3?* It takes practice and finesse for interviewers to learn to embed this type of extra information routinely. Even when they do, there are inherent limits on how much you can compensate for the absence of the visual dimension in an audio recording when your purpose is getting feedback to something that is visual.

- **For training purposes and skill improvement, the absence of the visual dimension is less important.** When you are conducting a feedback session, your attention is focused on the immediate task rather than on how well you are doing. Later, when you are listening to a recording of the session, you can analyze how you conducted the interview. With audio only, you may not know what someone is looking at when they make a remark, but you will be able to hear their tone of voice and your own tone of voice. As you listen to the audio, you can assess the decisions you made in guiding the discussion, such as when you chose to ask a follow-up question and when you didn't, and get ideas about how to do better next time.
- **If equipment is readily available, it generally takes little additional time or money to do audio recording of your feedback sessions.** You can make audio recordings with a simple cassette tape recorder or a digital recording device. If recording the sessions is important for your project and you don't have recording equipment, you can probably buy something suitable at relatively low cost. If you are doing individual interviews, a simple recorder with a decent microphone is all you need. If you are doing focus groups, the quality and placement of your recording equipment becomes more important, especially if the group is large or you hold the group in a large room with poor noise control. Professional facilities are usually already wired for high-quality audio recording.
- **It takes time to put the recordings to full use, and this may add to the expense.** While there are many benefits to having audio recordings, keep in mind that it takes some time to use them. If you are using audio recordings to enhance your written notes, you can use them selectively by listening to the recordings only when you need to, such as when you had trouble keeping up with taking notes. If you decide that a partial or full written transcript of the recordings is needed, this will add to the expense (see the section below about written transcription).



Source: Prepared for use in this Toolkit, based on personal experiences of the writer and colleagues.

## Should you do video recording of your sessions?

Figure 6-12-b below outlines the potential benefits of video recording and factors to consider in making your decision.

### Figure

6-12-b. Should you do video recording of your sessions?

In sessions with readers, video recording is not as widely used as audio recording. Video recording tends to be more expensive and more complicated to arrange.

Video recording is much more likely to be included in large projects done by researchers than in smaller projects done by non-researchers. Video is also more commonly used for focus groups than for individual interviews.



The potential benefits of video recording a feedback session include all of the potential benefits of audio recording that we discussed in Figure 6-12-a. These are:

- **To improve your written notes and refresh your memory.**
- **To help share the feedback with other people.** This might include using the recording to produce a written transcript.
- **As tools for training and skill improvement.**

Since video includes the visual aspects as well as the audio, it offers these additional benefits:

- **Having video can help you identify who is speaking and allow you to study non-verbal communication.** Video is especially useful for analyzing group sessions, because you can use it to check on who is saying what. Watching a video may give you insights into group dynamics

and their impact on the discussion that you wouldn't be able to get from just an audio recording or written transcript.

- **Visual cues can enhance your understanding of what people say.** Reviewing a video can sometimes help you see what they are reacting to when they comment on the written material. If you have video recordings, you can extract video clips to share with others. These can be even more compelling than audio clips, because people can watch as well as listen to the feedback readers give.

Here are some things to consider:

- **Compared to audio recording, video recording is more intrusive and more likely to make people feel uncomfortable or inhibited.** The added dimension of video tends to make privacy and dignity of greater concern to participants. It is one thing to have your voice recorded, and quite another to have what you say and do captured on video. If the video camera is right nearby, it can be distracting and potentially disturbing to participants than a tape recorder. If the camera is concealed or mounted in an unobtrusive place, as it often is in a commercial facility, it will be less distracting. (Of course, whether the camera is concealed or not, you must tell the participant about it and get permission in advance to do the video recording.)
- **Although video recording includes the visual component of the sessions, it can *still* be quite hard to tell which part of the written material readers are looking at when they make a remark.** By definition, video is better than audio alone at helping you watch how readers react to written materials. However, adding video does not necessarily end the frustration of being unable to connect what readers say with what they are looking at. While video usually shows the *readers* fairly well, it is often not as good as you might assume at showing the materials themselves or the readers interacting with the materials. **This is a *significant limitation*, and there are several reasons for it:**
  - **You cannot control what the reader does with the material.** For example, if a reader lifts up a booklet from the table and holds it in front of her, or below the edge of the table, you will not be able to film what she is looking at (unless you have a very intrusive camera operator – which wouldn't be a good idea in any case).
  - **It may not be feasible to use a camera angle that can track the expressions and eye movements of a reader who is looking down at written material.**
  - **Videos are seldom shot close enough and sharp enough to reveal the details of the written materials as well as the reader interacting with the material.** Many videos are shot from a fixed camera position that captures the full scene. If you can see all of the people around the table in a focus group, or the interviewer and the reader and the

materials, you are not going to be able to see the details of the materials. If the video zooms in, you may see the written material more clearly, but lose your view of the reader. Some commercial facilities provide a superior videotaping capability that is flexible enough to address these problems, but these facilities tend to be quite expensive, and they may provide much more detailed feedback than you want or need. For example, there are usability testing laboratories designed to capture keystrokes and eye movements of readers who are using websites.

- Videos shot through a one-way mirror at a commercial facility are often rather fuzzy.
- **Extracting video clips is generally time-consuming and costly.** While video clips have high impact as examples, it can take an enormous amount of time to identify appropriate clips, mark them for extraction, and edit them for final use. This level of effort probably makes sense only for a large-scale research project.



Source: Prepared for use in this Toolkit, based on personal experiences of the writer and colleagues.



## If you record your sessions, should you transcribe them?

If you record your feedback sessions, you can use the recordings to make a transcript of the session. This transcript provides a complete written record of a session that is easy to share with others and easy to use in analyzing your results. It can be useful to have a written transcription of what is said during sessions with readers, but it takes time and money to produce one:

- To help estimate costs, figure that a transcriber will spend roughly three to four times as long as the session to create the written transcript. For example, transcribing an hour-long session will take about three to four hours of transcription labor. If you have done a series of individual sessions, this can add up quickly.
- How long it takes to produce a good written transcript will vary depending on the quality of the recording, the skills of the transcriber, and the quality of the equipment used for transcription. If the voices are hard to hear, or there's a lot of background noise, transcription will take longer, because the transcriber will need to play parts of the recording over and over again.
- Transcribers who are skilled and experienced will tend to produce better transcriptions. For example, they will insert notes to let you know when the speaker was laughing or when the tone of voice was ironic or sarcastic. Without these notes from the transcriber, you would

misinterpret the meaning of what was said, because you can't hear the tone of voice when you read a written transcript.

Before you make this investment in transcription, think about how you would actually use the transcript, and whether it's really necessary to have transcripts for your project. Keep in mind that for many purposes, you can put an audio or video recording to good use without transcribing it.



## **Weighing the tradeoffs and making your decision**

For your project, does it make sense to rely solely on written notes, or should you include some type of recording as well? Audio or video recordings can't substitute for careful, thorough note taking, but they can be useful for many purposes. You will need to weigh the trade-offs of whether to record or not based on the needs of your project, the nature of your written materials and participants, and what you can afford in terms of time and resources. If you decide to make the investment in audio or video recording, be sure that you have a specific plan for how you will put your recordings to use.

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