

Behavioral Observation Checklist

Practical Guide | Before You Start | Noldus Information Technology

This checklist helps you verify that your behavioral observation setup is complete and ready to start. Work through each section systematically. If you've checked all boxes, you're ready to observe at scale. If not, address the gaps first.

1. Equipment & Recording Setup

Before you can observe, your recording system must be ready.

What You Need

- ☐ You have recording equipment (camera, microphone, etc.) and it's tested and ready
- ☐ Your recording location is set up with proper angle, lighting, and audio capture
- ☐ You have a backup plan if equipment fails

Why It Matters. Poor equipment setup ruins data before observation even starts. Test everything before your first session.

2. Observation Definitions

You must be clear about what you're observing before you record anything.

What You Need

- ☐ You've defined what specific behaviors or interactions you're observing with clear examples
- ☐ Your team has discussed these definitions and agrees on what counts and what doesn't
- ☐ You've identified the 3-5 key things that matter to your question

Why It Matters. Vague definitions lead to inconsistent observation. Clarity upfront saves rework later.

3. Storage & Access

Your video footage contains sensitive data that must be protected and accessible.

What You Need

- ☐ You have secure storage solution in place (encrypted, access-controlled)
- ☐ You have a backup storage location for your footage
- ☐ Video files are named and organized in a system everyone on your team understands

Why It Matters. Lost footage = lost data. Disorganized files waste hours searching. Insecure storage violates privacy.

4. Team & Workflow

Everyone on your team must know their role and responsibilities.

What You Need

- ☐ You've assigned roles: who records, who reviews, who tracks progress
- ☐ Your team is trained on the observation process and knows their responsibilities
- ☐ You have a schedule for when observations will happen and who will be involved

Why It Matters. Unclear roles create confusion, missed sessions, and duplication of effort. Clear workflow prevents chaos at scale.

5. Documentation & Consent

Your observation must be ethical and compliant.

What You Need

- ☐ Informed consent forms are prepared and signed by all participants (or consent process planned)
- ☐ You have documented what happens if someone declines or withdraws consent
- ☐ Your observation protocol is written down and accessible to your team

Why It Matters. Consent protects participants and protects you legally. Documentation ensures consistency and accountability.

6. Quality Control Plan

You need a clear plan for how you'll verify that your observations are reliable.

What You Need

- ☐ You have identified which footage will be reviewed by multiple observers
- ☐ You know how you'll track progress (what's been observed, what's pending)
- ☐ You have a schedule for alignment meetings where the team reviews and compares observations

Why It Matters. Without quality checks, you won't know if your observations are solid. Regular alignment prevents drift.

7. Data Security & Compliance

Your observation data must be protected and handled according to regulations.

What You Need

- ☐ Video files are stored securely with clear access restrictions
- ☐ You have a retention and deletion schedule documented
- ☐ Your setup complies with relevant data protection and privacy regulations

Why It Matters. Data breaches damage trust and create legal liability. Compliance is non-negotiable.

8. Ready to Observe

Before you go live, test your entire setup end-to-end.

What You Need

- ☐ You've done a test run with your full setup (equipment, recording, storage, access)
- ☐ Your team has practiced the observation workflow
- ☐ You have a contingency plan if something goes wrong during observation

Why It Matters. Problems discovered in a test run are easy to fix. Problems discovered during live observation are disasters.

Next Steps

If you've checked all boxes across all 8 sections, you're ready to start observing. If gaps remain, prioritize them:

Priority	Items
Critical (hold everything)	Equipment, definitions, consent, security
Important (fix soon)	Team roles, workflow, storage organization, quality plan
Nice-to-have (can refine as you go)	Contingency plans, detailed scheduling

Return to the relevant section above and address the unchecked items before proceeding.

Questions? Contact Noldus support at [\[support URL\]](#)