



Conquering User Stories Tools and Techniques

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Presenter



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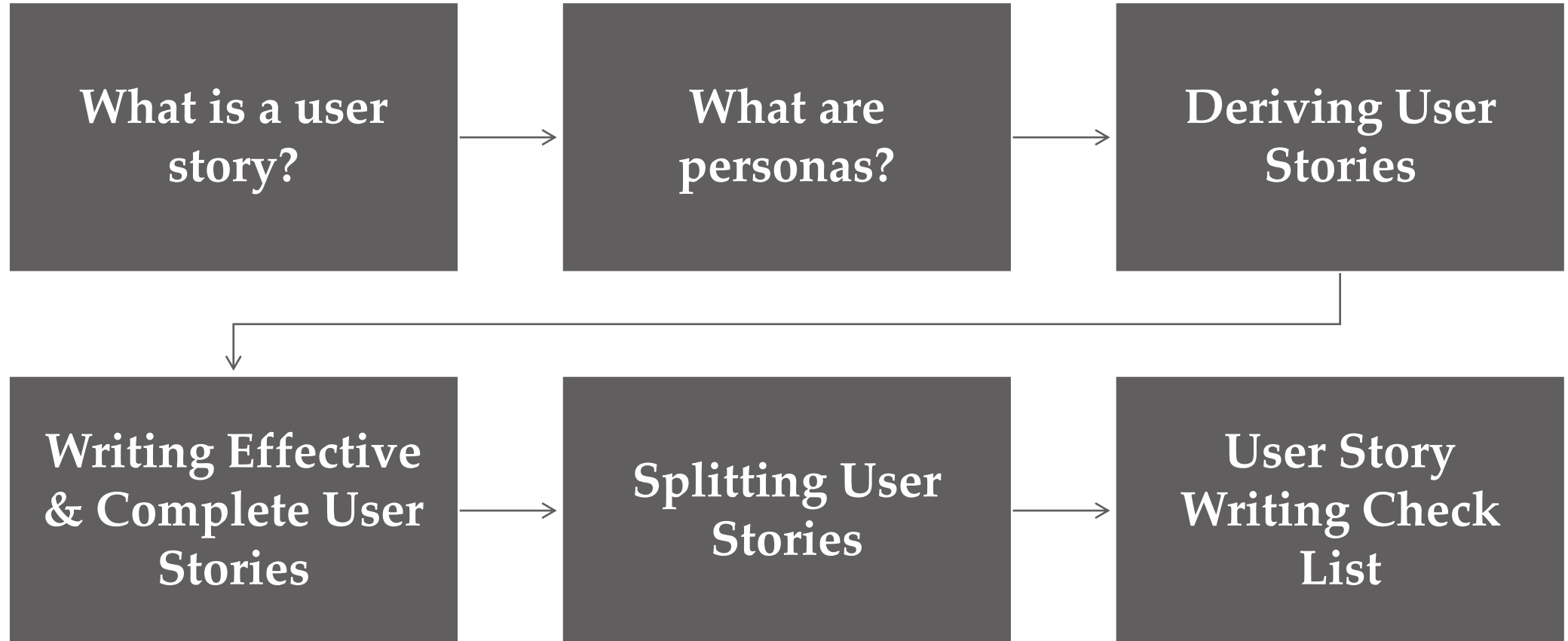
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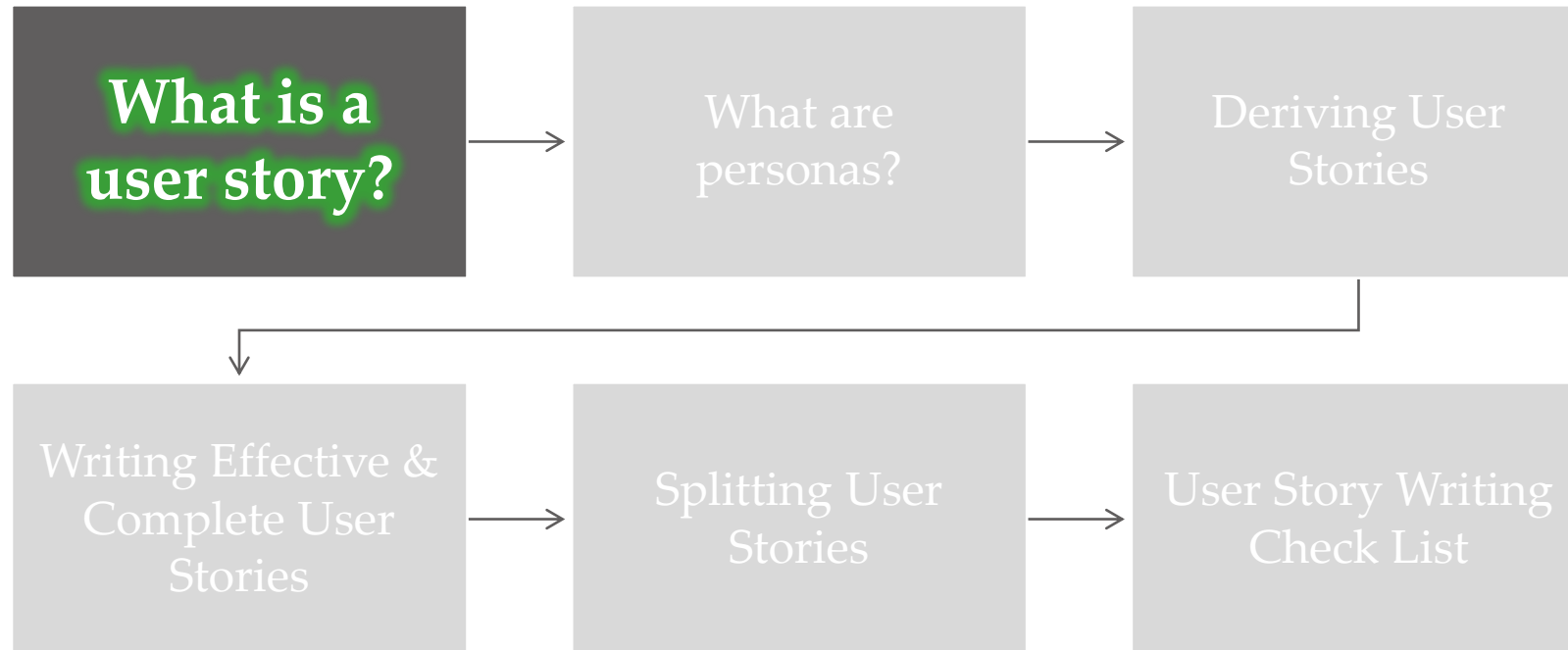
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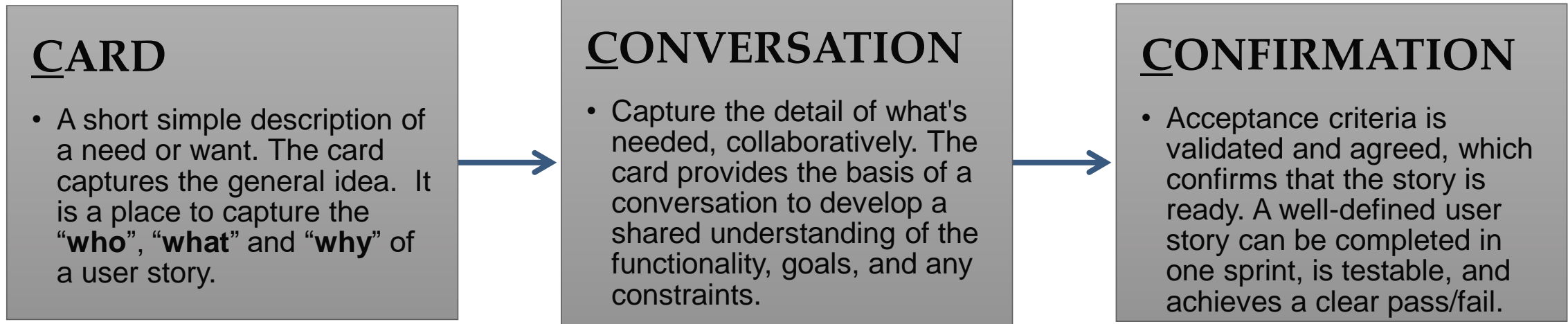


Agenda



A User Story...

- ◎ Is a brief description stating the need to perform an action, **from a user's/persona's perspective**, to achieve an objective, towards adding value.
- ◎ Generates conversations between all stakeholders.



User Story Format

As a(n) [Role/Persona]

Stakeholder who benefits from the user story.

I want [Goal/Action]

A high-level overview of the functionality/capability desired by the user.

So that I can [Benefit/Value]

The business value the story delivers.

As an investor I want
to have a portal to
help me view my
shares **so that I can**
understand what's in
my portfolio.

A User Story Is Not...

- ◎ A thesis.
- ◎ A complete requirement set.
- ◎ The definition of ready.
- ◎ The definition of done.



A User Story Needs...

◎ Supporting Artifacts:

- Acceptance Criteria
- Non Functional Requirements
- Definition of Done
- Workflow (when applicable)
- Mock-ups / Sketches (when applicable)
- Other Value Add Documents

COMPLETED

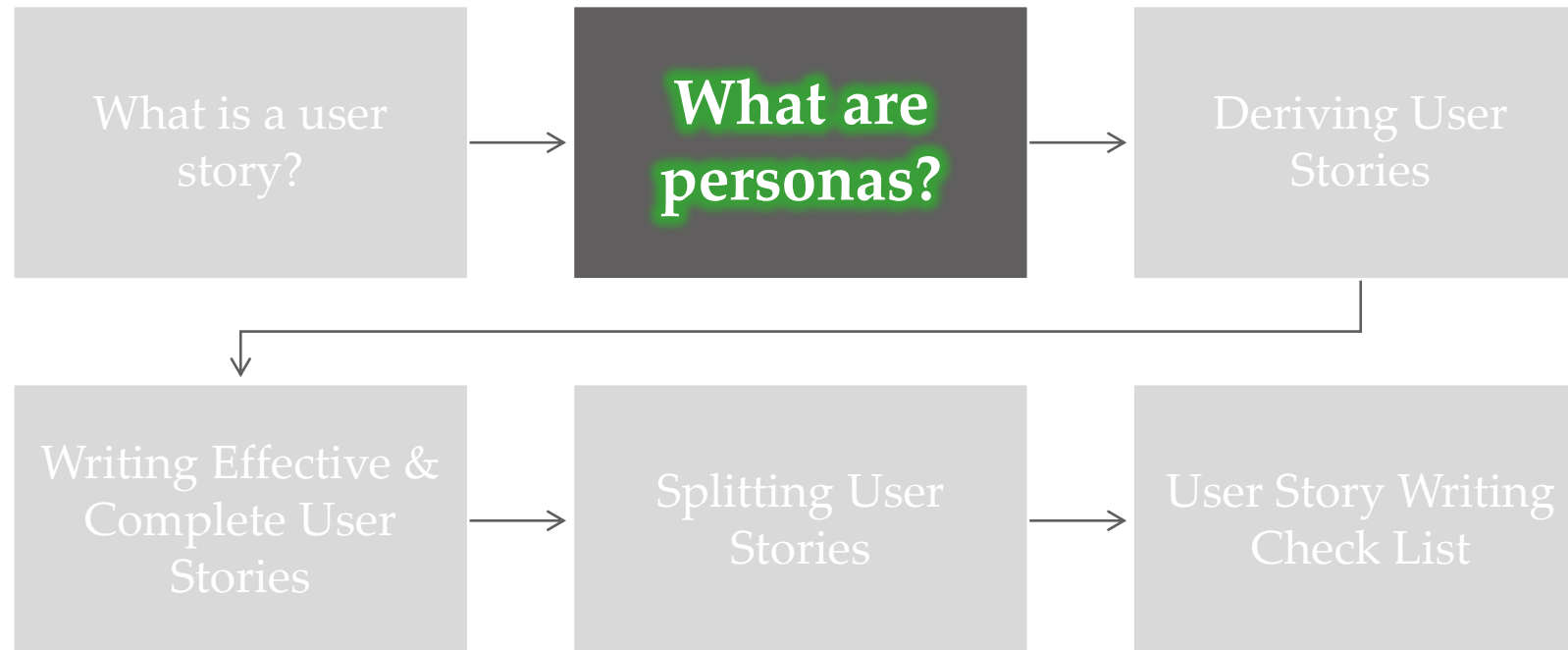
Key Components of A User Story

Title	Write a simple title using <i>action words/verbs</i>
Description	Role based, from a the user's perspective, defining portions of functionality
Acceptance Criteria	Set of statements or behavior expected Specify functional & non-functional requirements

Examples of Titles

- ◎ **Permit** end user to update credit card information
- ◎ **Prevent** unauthorized access to account information
- ◎ **Update** an account profile
- ◎ **Register** for a new account

Agenda



The Persona Technique

- A persona is a role or a fictional character representation for whom a product shall be built.
- Describes how the character may expect to interact with the product.
- A persona describes the characteristics, goals and behavior or a specific group or demographic of users.

Persona Examples

Melissa



“ It’s not about me.
it’s about my girls.”

AT A GLANCE

AGE — 41

LOCATION — Chicago, IL

LIFE STAGE — Divorced with two kids

JOB — Corporate procurement manager

MOTIVATORS

FAMILY — Doing what’s right for her kids and looking after her parents are the most important things in her life.

BEING HELPFUL & APPRECIATED FOR IT — She gets a lot of pride from being productive, effective, and helpful. Being thanked and acknowledged for it is the motivator that keeps her going.

FEELING HAPPY & GRATEFUL — Melissa gets frustrated and frazzled because she’s always running, but really she values being happy and tries to appreciate all the good things in her life, particularly after a difficult divorce.

BEHAVIORS

TIGHTLY SCHEDULES THE DAY — The morning routine to get the kids off to school and herself off to work is locked in. She’s busy at work all day and tends to spend the majority of her day in meetings. The evening routine is equally structured. When her ex has the girls, she goes out with a friend for dinner or catches up on the phone.

VOLUNTEERS — At kids’ school and church.

SPENDS TIME WITH EXTENDED FAMILY — Parents live and sister’s family live nearby. Most weekends she visits their house or they visit hers.

TALKING ON THE PHONE AND “CATCHING” UP VIA FACEBOOK — Likes to talk on the phone with girls friends and her sister. Late at night after work she hops on Facebook to achieve the same sense of connection.

NEEDS

- Social connection
- Would like to start dating again
- Exercise and “me” time
- Would like to just sit and unwind, but feels like she’s usually so amped up from her schedule that simply resting feels wrong

John



Nick



Anne



Beth



<https://www.flickr.com/photos/rosenfeldmedia/9203796918>

<http://blog.flickr.net/en/2010/08/16/j-trav-persona/>

Persona/Customer Experience Journey

Rail Europe Experience Map

Guiding Principles

- People choose rail travel because it is convenient, easy and flexible
- Rail booking is only one part of people's larger travel process
- People build their travel plans over time
- People value service that is respectful, effective and personable

Customer Journey

Stages	Research & Planning	Shopping	Booking	Post Booking Pre-Travel	Travel	Post Travel
Rail Europe	Research destinations, routes and products	Enter trips Review fares Select pass(es)	Confirm itinerary Delivery options Payment options Review & confirm	Wait for paper tickets to arrive	Activities, unexpected changes	Share experience Follow-up on refunds for booking changes
Doing						
Thinking	<ul style="list-style-type: none"> What is the easiest way to get around Europe? Where do I want to go? How much time should I/we spend in each place for site seeing and activities? 	<ul style="list-style-type: none"> I want to get the best price, but I'm willing to pay a little more for first class. How much will my whole trip cost me? What are my trade-offs? Are there other activities I can add to my plan? 	<ul style="list-style-type: none"> Do I have all the tickets, passes and reservations I need in this booking so I don't pay more shipping? Rail Europe is not answering the phone. How else can I get my question answered? 	<ul style="list-style-type: none"> Do I have everything I need? Rail Europe website was easy and friendly, but when an issue came up, I couldn't get help. What will I do if my tickets don't arrive in time? 	<ul style="list-style-type: none"> I just figured we could grab a train but there are not more trains. What can we do now? Am I on the right train? If not, what next? I want to make more travel plans. How do I do that? 	<ul style="list-style-type: none"> Trying to return ticket I was not able to use. Not sure if I'll get a refund or not. People are going to love these photos! Next time, we will explore routes and availability more carefully.
Feeling	<ul style="list-style-type: none"> I'm excited to go to Europe! Will I be able to see everything I can? What if I can't afford this? I don't want to make the wrong choice. 	<ul style="list-style-type: none"> It's hard to trust Trip Advisor. Everyone is so negative. Keeping track of all the different products is confusing. Am I sure this is the trip I want to take? 	<ul style="list-style-type: none"> Website experience is easy and friendly! Frustrated to not know sooner about which tickets are eTickets and which are paper tickets. Not sure my tickets will arrive in time. 	<ul style="list-style-type: none"> Stressed that I'm about to leave the country and Rail Europe won't answer the phone. Frustrated that Rail Europe won't ship tickets to Europe. Happy to receive my tickets in the mail! 	<ul style="list-style-type: none"> I am feeling vulnerable to be in an unknown place in the middle of the night. Stressed that the train won't arrive on time for my connection. Meeting people who want to show us around is fun, serendipitous, and special. 	<ul style="list-style-type: none"> Excited to share my vacation story with my friends. A bit annoyed to be dealing with ticket refund issues when I just got home.
Experience	<p>Enjoyability: [Bar chart]</p> <p>Relevance of Rail Europe: [Bar chart]</p> <p>Helpfulness of Rail Europe: [Bar chart]</p>	<p>Enjoyability: [Bar chart]</p> <p>Relevance of Rail Europe: [Bar chart]</p> <p>Helpfulness of Rail Europe: [Bar chart]</p>	<p>Enjoyability: [Bar chart]</p> <p>Relevance of Rail Europe: [Bar chart]</p> <p>Helpfulness of Rail Europe: [Bar chart]</p>	<p>Enjoyability: [Bar chart]</p> <p>Relevance of Rail Europe: [Bar chart]</p> <p>Helpfulness of Rail Europe: [Bar chart]</p>	<p>Enjoyability: [Bar chart]</p> <p>Relevance of Rail Europe: [Bar chart]</p> <p>Helpfulness of Rail Europe: [Bar chart]</p>	<p>Enjoyability: [Bar chart]</p> <p>Relevance of Rail Europe: [Bar chart]</p> <p>Helpfulness of Rail Europe: [Bar chart]</p>

Opportunities			PLANNING, SHOPPING, BOOKING			POST-BOOK, TRAVEL, POST-TRAVEL	
GLOBAL							
Communicate a clear value proposition. STAGE: Initial visit	Help people get the help they need. STAGES: Global	Support people in creating their own solutions. STAGES: Global	Enable people to plan over time. STAGES: Planning, Shopping	Visualize the trip for planning and booking. STAGES: Planning, Shopping	Arm customers with information for making decisions. STAGES: Shopping, Booking	Improve the paper ticket experience. STAGES: Post-Booking, Travel, Post-Travel	Accommodate planning and booking in Europe too. STAGE: Traveling
Make your customers into better, more savvy travelers. STAGES: Global	Engage in social media with explicit purposes. STAGES: Global		Connect planning, shopping and booking on the web. STAGES: Planning, Shopping, Booking	Aggregate shipping with a reasonable timeline. STAGE: Booking		Proactively help people deal with change. STAGES: Post-Booking, Traveling	Communicate status clearly at all times. STAGES: Post-Booking, Post-Travel

Information sources: Stakeholder interviews, Cognitive walkthroughs, Customer Experience Survey, Existing Rail Europe Documentation

Legend: Ongoing, non-linear; Linear process; Non-linear, but time based

adaptive path

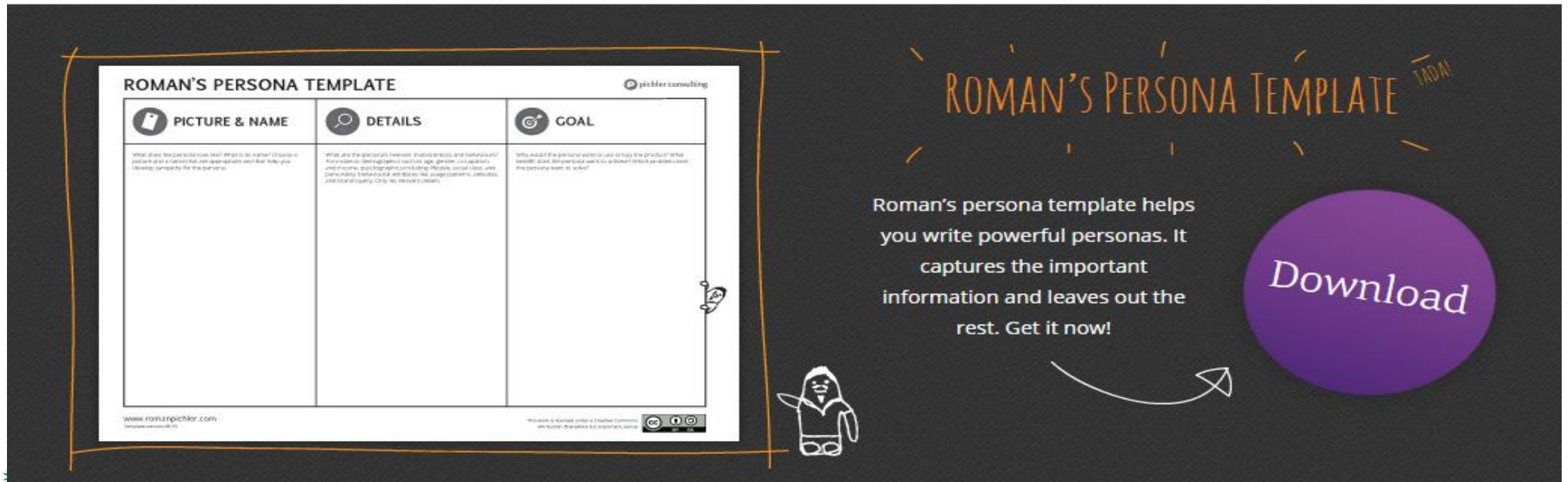
Experience Map for Rail Europe | August 2011



https://c1.staticflickr.com/9/8378/8462249080_6866235eab_b.jpg

Free Persona Template to get you started

Roman's Persona Template



The image shows a screenshot of the 'ROMAN'S PERSONA TEMPLATE' form and a promotional graphic. The form is divided into three columns: PICTURE & NAME, DETAILS, and GOAL. The promotional graphic features the title 'ROMAN'S PERSONA TEMPLATE' in a stylized font, a purple 'Download' button, and a cartoon character.

PICTURE & NAME	DETAILS	GOAL
What does the persona look like? What is his name? (Use his picture and a cartoonish representation will help you develop sympathy for the persona.)	What are the persona's relevant characteristics and background? (For instance: Demographic (sex, age, gender, occupation) and income, psychographics (values, beliefs, social class) and personality traits) AND list three key usage patterns, attitudes, and loyalties. Only 100 words please!	Why would the persona want to use or buy the product/real benefit? Does the persona want to achieve which particular goal? (The persona name is visible!)

www.romanpichler.com

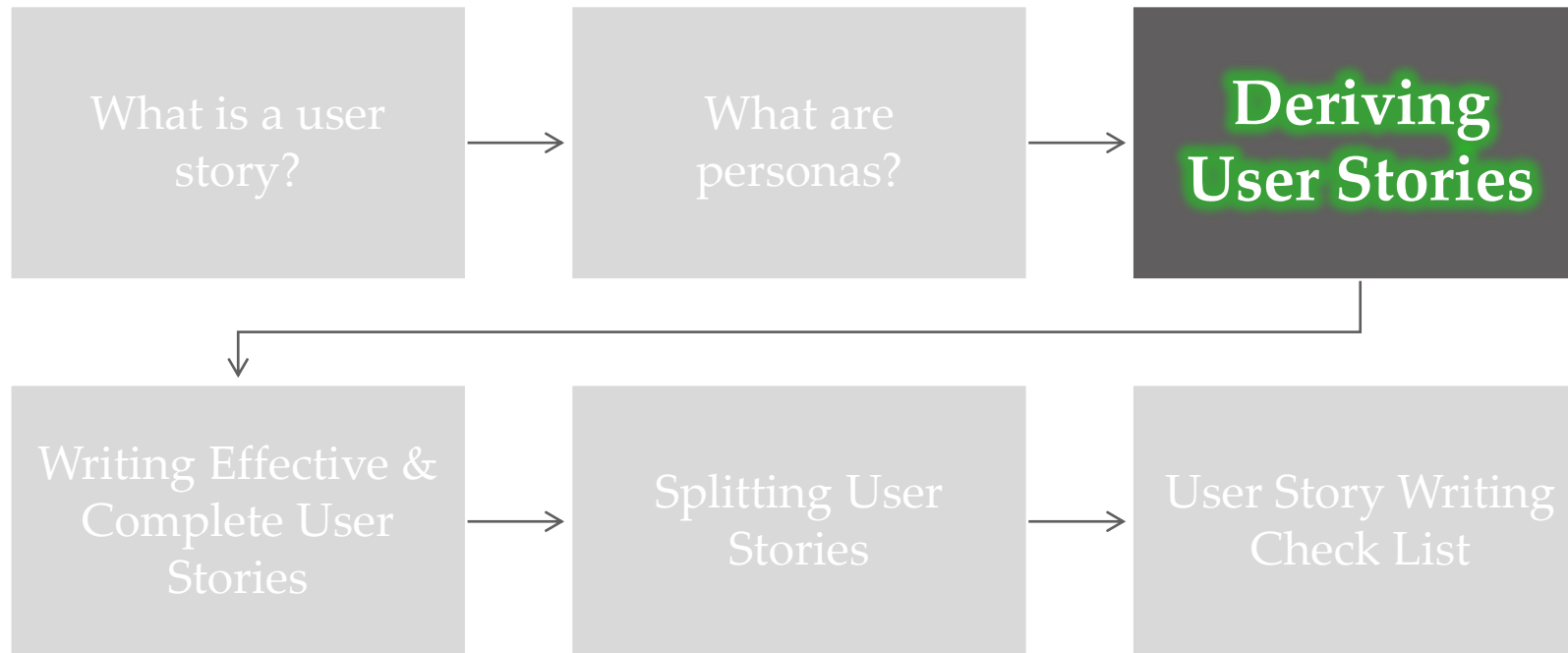
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ROMAN'S PERSONA TEMPLATE

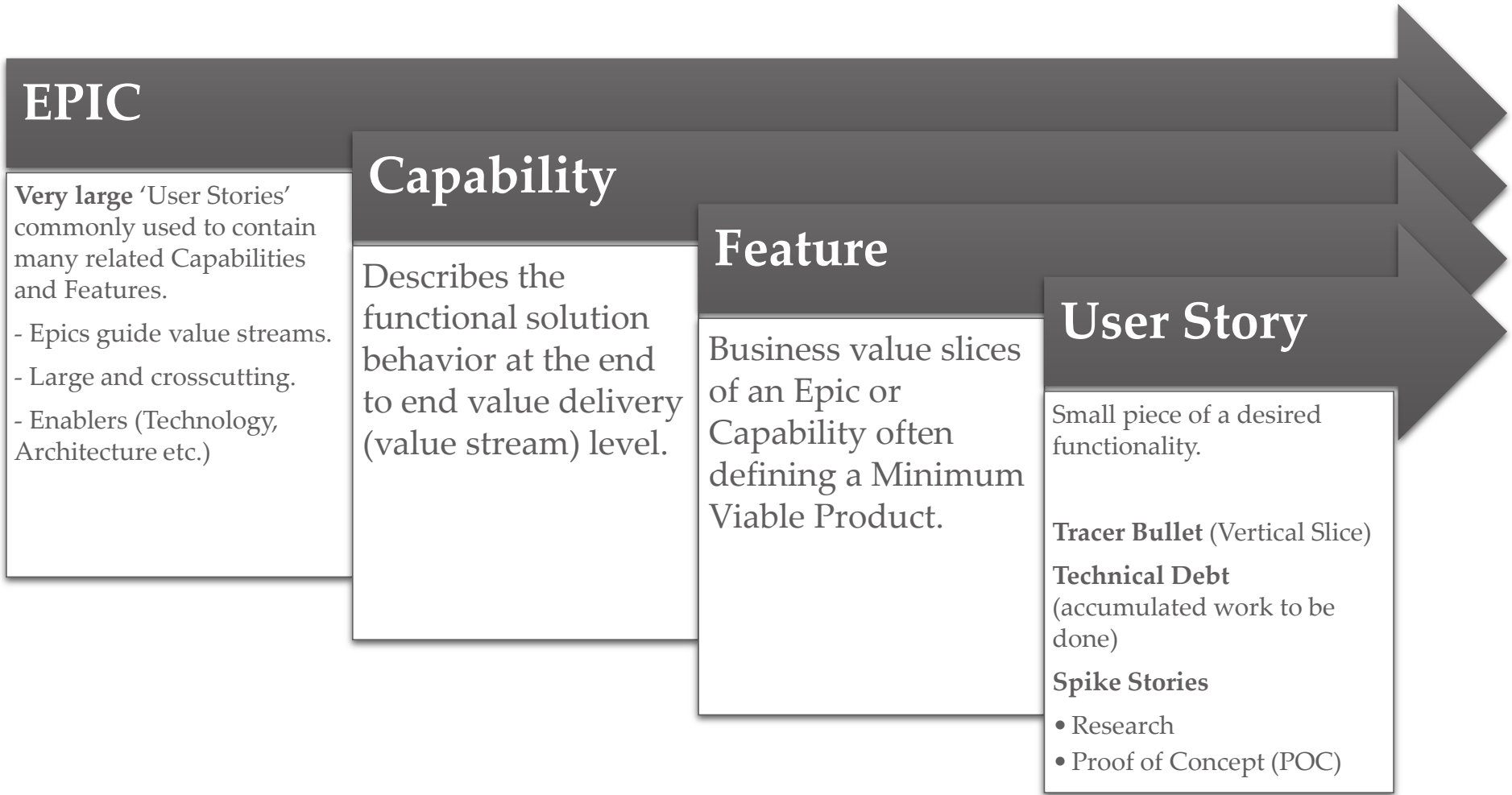
Download

Roman's persona template helps you write powerful personas. It captures the important information and leaves out the rest. Get it now!

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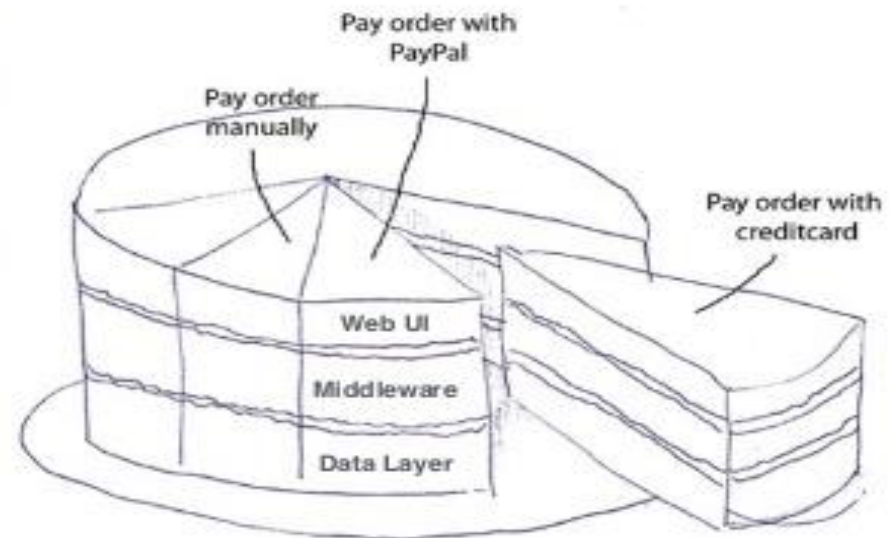


Deriving User Stories For The Product



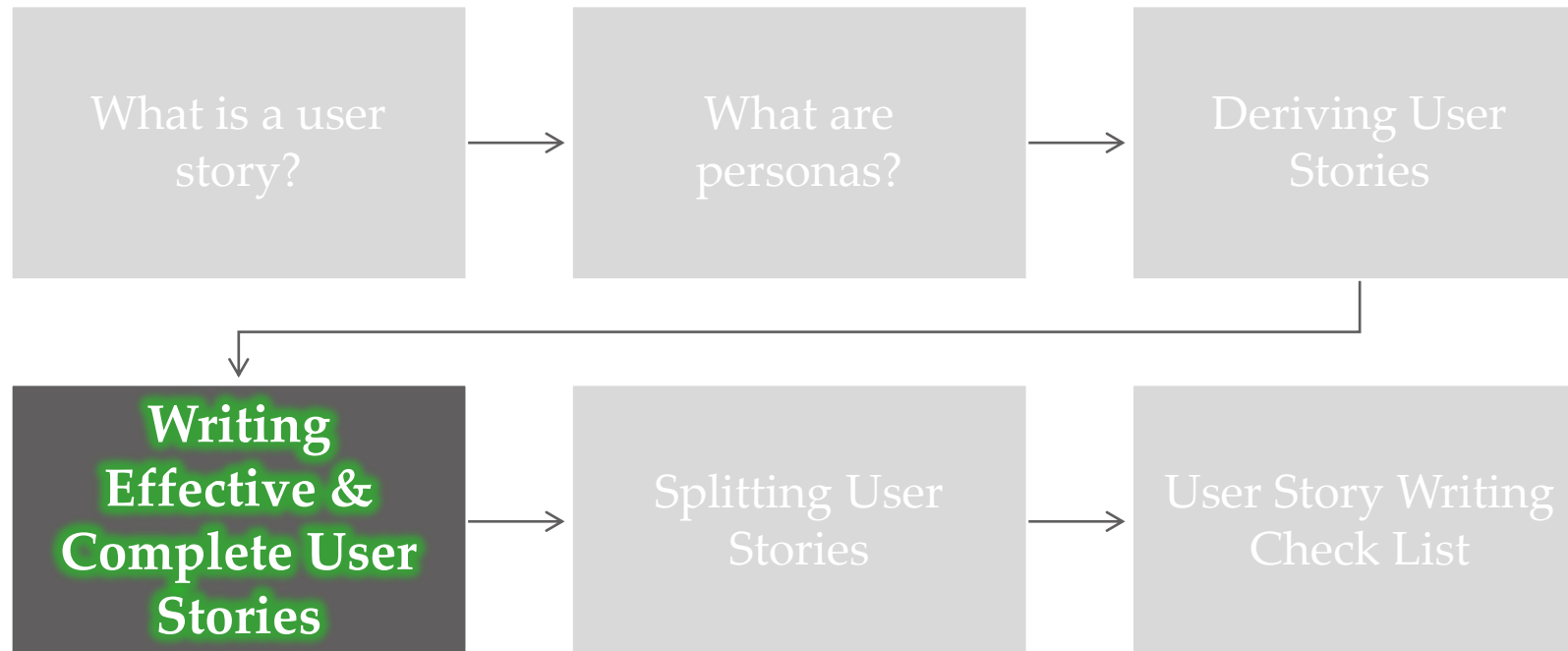
Vertical Slices

over
Horizontal Slices



<http://image.slidesharecdn.com/mkeagile032014-slicingthecakeuserstorydecomposition-140312084503-phpapp02/95/mke-agile-032014-slicing-the-cake-user-story-decomposition-4-638.jpg?cb=1394613969>

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Non Functional Requirements

[Non-Functional Requirements Add Value to User Stories \(Part 5\).mp4](#)

Available on

YouTube: <https://www.youtube.com/watch?v=NnD7UhnIsNc>

Acceptance Criteria

- Acceptance criterion are the elements describing how the user will use the product, and what they would like to have the ability to do with the product.
- Acceptance criterion also includes input from the team's perspective to support the user's needs. *i.e. non functional requirements.*



Deriving Acceptance Criteria

- What capabilities are you expecting from this feature or functionality?
- How will this support your business process?
- What are the business problems that you would like to solve with this feature or functionality?
- What are the conditions that this feature or functionality should meet?
- What non functional requirements should be met by this feature?

Avoid Ambiguity: **Include Measurable Requirements**

Express acceptance criteria in specific, measurable, testable terms so that developers and testers can derive code and test cases to deliver what is expected.

Avoid subjective language such as: **better, good, allowable, a few miles, fast up time** etc.

Avoid generalization such as, **all the time, never, everyone, always** etc.



<http://bestandworstever.blogspot.com/2012/07/best-lane-ending-sign-ever.html>

Acceptance Criteria Examples

Statements:

1. Ability to select and view all shares in my portfolio any time I want to.
2. Ability to save different views of my shares by organization, and see saved views when I log back in.

As an investor I want to have a portal to help me view my shares **so that I can** understand what's in my portfolio.

Given When Then:

1. Given when I enter my credentials and log into my portal at any time, I would like to have options to select and view all shares in my portfolio.
2. Given when I save my views by organization and log out, then log back in, I would like to have the ability to see my saved views.

Non functional requirements:

1. The portal must be available 24 hours per day, 7 days per week
2. The page load time must be 4 secs or less.

THE INVEST MODEL

I	Independent	Story stands on its own (“vertical slice”)
N	Negotiable	The “what”, not the “how”; there is enough information to start work
V	Valuable	Is this valuable to the Customer/Users?
E	Estimable	Can this work effort be estimated based on the information we have? There needs to be enough detail for the developers to estimate the user story.
S	Small	Sized Appropriately: Is the work small enough to be executed during a sprint? Is it too small (a Task vs User Story)?
T	Testable	Can you test this requirement?

User stories that are written with the INVEST model in mind, usually meet the expectations for a good user story.

A Complete User Story

Story name

Value statement

Attach details and documents when necessary

Butlerhouse.net

Edit User Story » US9: Credit card payments

General

ID: US9

Name: Credit card payments

Tags: Choose Tags

Description:

Normal

As a purchaser on the website,
I want the ability to pay with a credit card,
So that I may immediately confirm my purchase.

Acceptance Criteria:

- Accept Discover, Visa, MC
- Validate CC# when entered
- Validate expiration date and CVV.
- Validate billing address
- Generate success and failure messages after processing

Definition of Done:

- Passes all regression tests
- Passes testing per acceptance criteria items
- Approved by UI Team
- Able to show feature in company demo

Attachments: Browse...

mockup.png
Description: Mockup of entry form

Owner: Greg

Schedule

State: Defined

Iteration: **Unscheduled**

Plan Est: 8.0 Points

To Do: 0.0 Hours

Task Est: 0.0 Hours

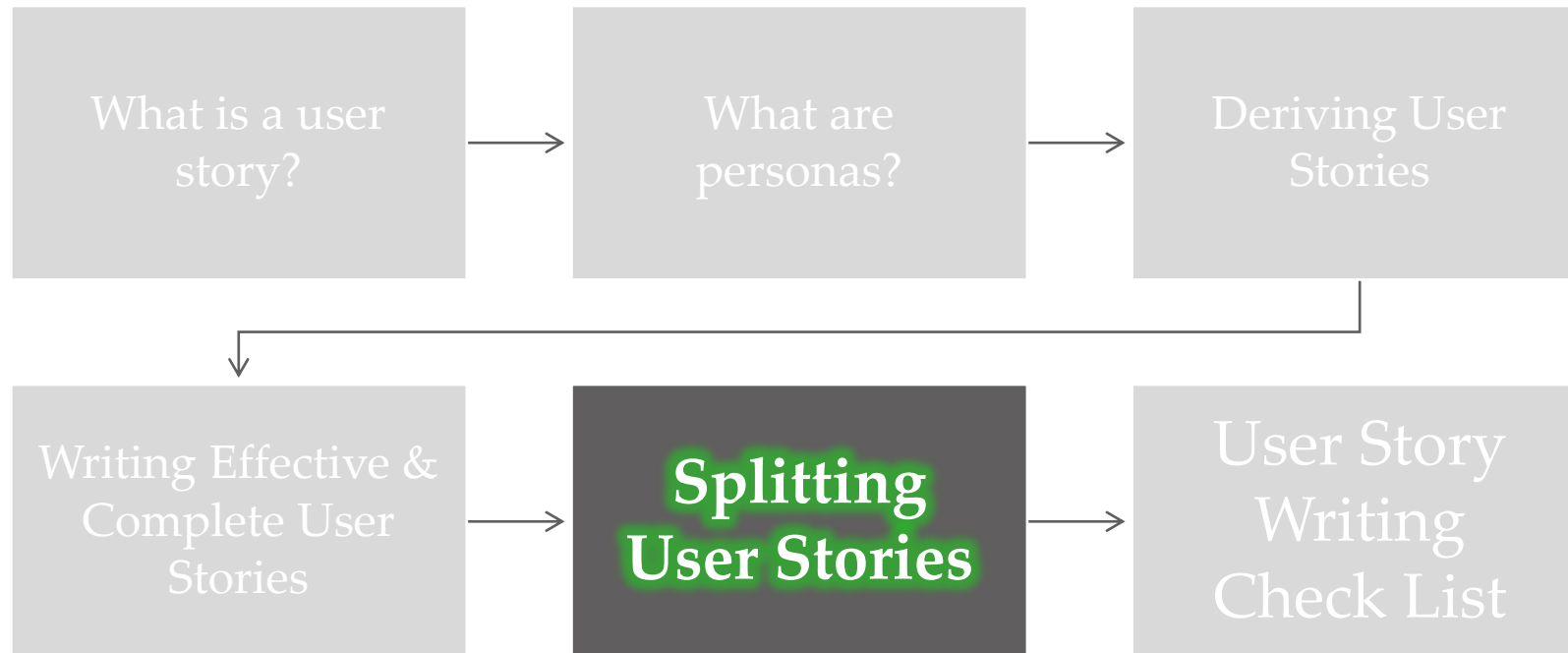
Save & Close Save & New Save Cancel

What is required for the business and product owner to accept the story

What is required by the team (quality/standards) before sending out for review. Does not change from one story to another. Mature teams may post this on the wall of the team working area instead of within each story.

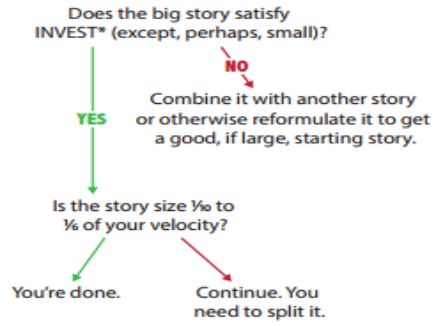
Size (effort) estimate, in relative points

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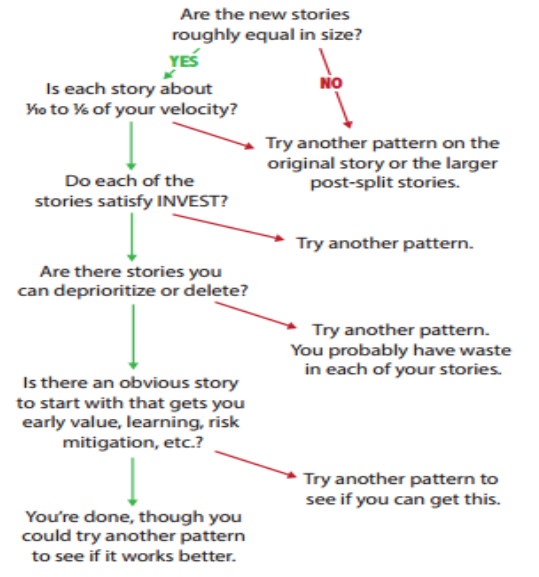


HOW TO SPLIT A USER STORY

1 PREPARE THE INPUT STORY



3 EVALUATE THE SPLIT



WORKFLOW STEPS

Can you split the story so you do the beginning and end of the workflow first and enhance with stories from the middle of the workflow?

Can you take a thin slice through the workflow first and enhance it with more stories later?

DEFER PERFORMANCE

Could you split the story to just make it work first and then enhance it to satisfy the non-functional requirement?

Does the story get much of its complexity from satisfying non-functional requirements like performance?

OPERATIONS

Can you split the operations into separate stories?

Does the story include multiple operations? (e.g. is it about "managing" or "configuring" something?)

BUSINESS RULE VARIATIONS

Can you split the story so you do a subset of the rules first and enhance with additional rules later?

Does the story have a variety of business rules? (e.g. is there a domain term in the story like "flexible dates" that suggests several variations?)

VARIATIONS IN DATA

Can you split the story to process one kind of data first and enhance with the other kinds later?

Does the story do the same thing to different kinds of data?

2 APPLY THE SPLITTING PATTERNS

start here

Does the story have a complex interface?

INTERFACE VARIATIONS

Can you split the story to handle data from one interface first and enhance with the others later?

Is there a simple version you could do first?

Does the story get the same kind of data via multiple interfaces?

MAJOR EFFORT

Could you group the later stories and defer the decision about which story comes first?

When you apply the obvious split, is whichever story you do first the most difficult?

SIMPLE/COMPLEX

Could you split the story to do that simple core first and enhance it with later stories?

Does the story have a simple core that provides most of the value and/or learning?

BREAK OUT A SPIKE

Are you still baffled about how to split the story?

Can you find a small piece you understand well enough to start?

Write that story first, build it, and start again at the top of this process.

Can you define the 1-3 questions most holding you back?

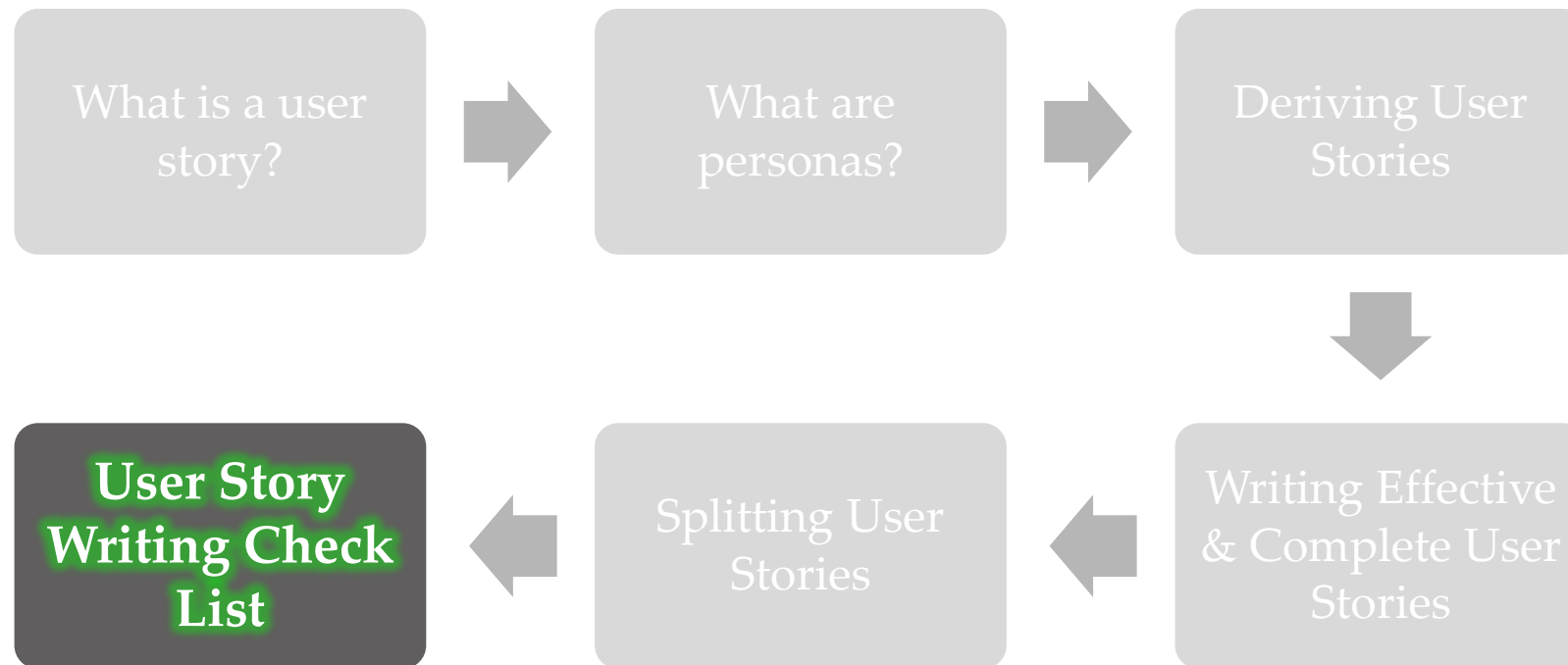
Write a spike with those questions, do the minimum to answer them, and start again at the top of this process.

Take a break and try again.

last resort

* INVEST - Stories should be:
Independent
Negotiable
Valuable
Estimable
Small
Testable

Agenda



User Story Checklist

Standard Format

- ✓ **As a(n) [Role/Persona]**
Stakeholder who benefits from the user story.
- ✓ **I want [Goal/Action]**
A high-level overview of the functionality/capability desired by the user.
- ✓ **So that I can [Benefit/Value]**
The business value the story delivers.

Acceptance Criteria

- ✓ PO/BA defines what the feature is expected to do for them to accept the user story on behalf of the user.
- ✓ The “**what**” not the “**how**”
- ✓ What does the user need the ability to do?
- ✓ Non-Functional Requirements
- ✓ Reviewed by the team and team provided feedback and input for the acceptance criteria.

Definition of Done

- ✓ Activities the team follows to complete the story.
 - ✓ This includes satisfying the acceptance criteria.
- Example:
- ✓ Met the INVEST model
 - ✓ Coding done
 - ✓ Testing done
 - ✓ All bugs fixed
 - ✓ Environments provisioned appropriately
 - ✓ Code reviews done
 - ✓ Automated builds created and executed
 - ✓ Acceptance criteria satisfied

Supporting Artifacts

- ✓ Source documents
- ✓ Wireframes
- ✓ Workflows
- ✓ Mock-ups
- ✓ Designs
- ✓ Narratives (background for the story)
- ✓ External Dependencies
- ✓ Links to other stories



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Thank You