Story Mapping
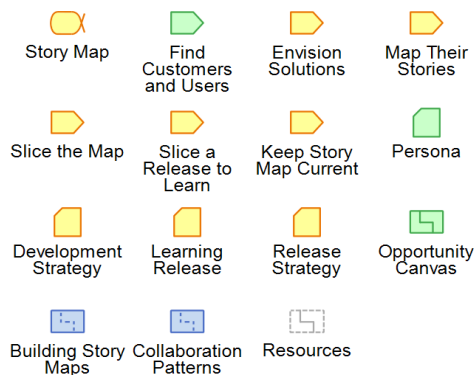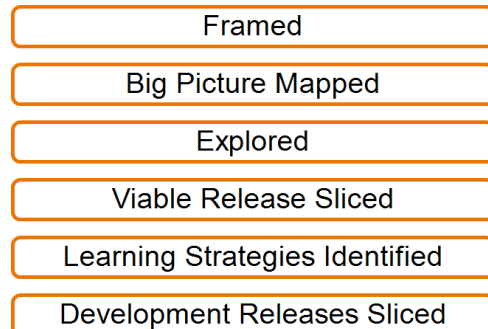
A process that uses a simple visual tool to promote discussion and build a shared understanding and agreement about a solution.

- Story Map
- Find Customers and Users
- Envision Solutions
- Map Their Stories
- Slice the Map
- Slice a Release to Learn
- Keep Story Map Current
- Persona
- Development Strategy
- Learning Release
- Release Strategy
- Opportunity Canvas
- Building Story Maps
- Collaboration Patterns
- Resources

Story Map

A visual tool capturing the steps users make to accomplish their goals and describing how a solution can be developed.

- Framed
- Big Picture Mapped
- Explored
- Viable Release Sliced
- Learning Strategies Identified
- Development Releases Sliced

Relates to: Requirements

Story Map

Big Picture Mapped

- ☐ Key Users Identified
- ☐ User Discussions Have Taken Place
- ☐ Steps Written From The User's Perspective
- ☐ High-Level Steps Captured
- ☐ Whole Story Captured
- ☐ Proto-Personas Created For Key Users

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Story Map

Development Releases Sliced

- ☐ First 'Walking Skeleton' Slice Identified
- ☐ Second Slice Identified to Extend Functionality
- ☐ Further Refinements Identified in Third Slice
- ☐ Large Stories Thinned and Split Across Slices

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Story Map

Explored

- ☐ Users And Other Experts Involved
- ☐ Customers Involved
- ☐ Good-Better-Best Options Identified
- ☐ Variations and Exceptions Identified
- ☐ Business Rules Captured
- ☐ User Experience Sketched

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Story Map

Framed

- ☐ Users Identified
- ☐ Users' Problems Identified
- ☐ Users' Benefits Identified
- ☐ Customers Identified
- ☐ Customer Benefits Identified
- ☐ Builder's Benefits Identified

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Story Map

Learning Strategies Identified

- ☐ Biggest Risks Identified
- ☐ Tests To Evaluate Biggest Risks Identified
- ☐ Learning Releases Identified

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Story Map

Viable Release Sliced

- ☐ Solution Releases Sliced
- ☐ Story Map Displays Release Slices
- ☐ Solution Success Metrics Defined
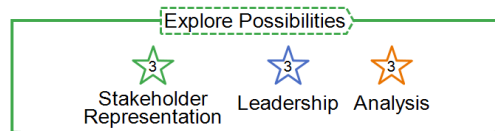- ☐ Outcomes and Impact Of Each Release Agreed

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Find Customers and Users

Identify the different users of the solution; who are the critical users? Identify who is the customer and who will buy the solution. Observe users at work if possible.

Explore Possibilities
- ⭐3 Stakeholder Representation
- ⭐3 Leadership
- ⭐3 Analysis

◻ Story Map: Framed
   └ Persona: Proto Persona

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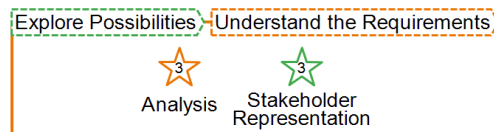Designed using IJI Essence in Practice Workbench™   1.0.0

Envision Solutions

Use various artifacts to envision the solution, such as proto personas to describe users, UI sketches to describe their user experience, architectural diagrams to describe their underlying systems. Leverage these visualizations to help evolve the map.
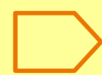
◻ Story Map: Big Picture Mapped

Explore Possibilities   Understand the Requirements
- ⭐3 Analysis
- ⭐3 Stakeholder Representation

◻ Story Map: Explored or beyond
   └ Persona: Proto Persona (optional)

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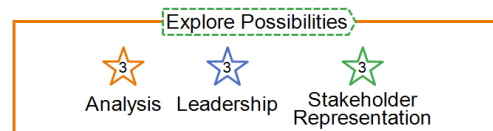Designed using IJI Essence in Practice Workbench™   1.0.0

Map Their Stories

Discuss with users what they need to do, step by step. Capture those steps and arrange them in order horizontally. Decompose big steps into smaller steps, options and alternatives vertically. Move and change items as needed during discussion. Use the same map to show the order that different users complete their work.

◻ Story Map: Framed

Explore Possibilities
- ⭐3 Analysis
- ⭐3 Leadership
- ⭐3 Stakeholder Representation

◻ Story Map: Big Picture Mapped or beyond

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Slice the Map

Use slicing to identify releases, learning strategies and development strategies. Agree on a specific outcome for each slice and move all the steps in the body needed to accomplish that outcome. Leave backbone activities in place at the top of the map.

Ensure Stakeholder Satisfaction
Understand the Requirements   Shape the System
- ⭐3 Analysis
- ⭐3 Development
- ⭐3 Testing
- ⭐3 Stakeholder Representation

◻ Story Map: Viable Release Sliced - Learning Strategies Identified - Development Releases Sliced

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Slice a Release to Learn

Create a release targetted at a small subset of users. Release and iteratively improve until you are confident to release to all users.

"Nail it before you scale it."

◻ Story Map: Explored

Understand Stakeholder Needs
Understand the Requirements   Shape the System
- ⭐3 Stakeholder Representation
- ⭐3 Analysis
- ⭐3 Development
- ⭐3 Testing

◻ Story Map: Viable Release Sliced

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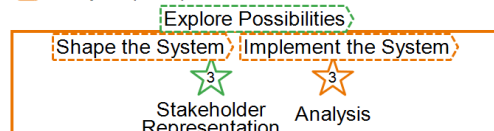## Keep Story Map Current

Once development has started a Story Map remains a living document. Update the Story Map to reflect any changes in understanding of the users or solution. Update the map regularly to show what work has started
and what work is complete.

◻ Story Map: Explored

Explore Possibilities
Shape the System   Implement the System
- ⭐3 Stakeholder Representation
- ⭐3 Analysis

◻ Story Map: Viable Release Sliced - Learning Strategies Identified - Development Releases Sliced

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Persona

A tool to help understand who our customers and users are. Build a persona for each customer and also for specific examples of your users.

Create a proto persona out of the facts you have, anecdotal experience, and assumptions about your users and other stakeholders.

Validate risk assumptions later with research and update the persona with new facts to create a research-based persona.

Proto Persona

Research-Based Persona

Describes: ◻ Story Map

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Persona

Proto Persona

Capture assumptions, anecdotal experience and facts to together and fill in the canvas. Discuss which pieces of information are facts, which items need to be validated. Identify what we currently do not know about this persona and determine how to find out that missing information. Update the canvas iteratively as new information has been collected.

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Persona

Research-Based Persona

The persona contains only validated factual information.

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Development Strategy

Break the release of your minimal viable solution into parts; decide which parts to build earlier in order to identify technical and development risks. Repeat this activity for each release slice.

Walking Skeleton

Richer Experience

Ready for Delivery

Describes: ⬡ Story Map

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Development Strategy

Walking Skeleton

Create a minimal working end-to-end thin slice of the solution.
A walking skeleton is:
'a tiny implementation of the system that performs a small end-to-end function. It need not use the final architecture, but it should link together the main architectural components. The architecture and the functionality can then evolve in parallel.'

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Ref: ⬚ Cockburn (1994) Walking Skeleton

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Development Strategy

Richer Experience

Add a second slice which adds more functionality and which supports alternate ways to use the solution and handles error conditions.

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Development Strategy

Ready for Delivery

Complete final refinements to make the solution ready for delivery.

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Learning Release

A release targeted at a small subset of your users. Release and iteratively improve until you're confindent to release to all users.
"Nail it before you scale it."

Early Adopters Chosen

Release(s) To Learn Sliced

Scaling & Operational Support Sliced

Describes: ⬡ Story Map

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Learning Release

Early Adopters Chosen

Choose early adopters of the product - people that have the need and motivation to use it. These are a subset of your target audience for your first general release.

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Learning Release

Release(s) To Learn Sliced

Include just enough functionality for users to use and get value out of the product.

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Learning Release

Scaling & Operational Support Sliced

Identify and exclude work you will need to do to scale the software for all users. Identify and exclude work you will need to support the release at scale.

3 / 3

1.0.0

Release Strategy

Describes what functionality on the Story Map will be delivered as a series of incremental releases to the customer. Each release is shown as a horizontal strip of steps on the Story Map. For each release agree on target users and the outcomes or value they'll get with the release. Identify success metrics for each release

Target Customer & Users Identified

Release Scope Defined

Delivery Mechanism Confirmed

Success Metrics Identified

Describes: Story Map

1.0.0

Release Strategy

Target Customer & Users Identified

Different releases may target different sets of users. For each release identify who the release is for and what benefits you expect them to get from using that release.

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1.0.0

Release Strategy

Release Scope Defined

Define the features you will support in this release, and which features are out of scope. Keep the scope of any release as small as possible but with sufficient new features to delight the target users and customer.

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1.0.0

Release Strategy

Delivery Mechanism Confirmed

Describe how you will deliver the release to its customer and users.

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1.0.0

Release Strategy

Success Metrics Identified

Agree how you will measure the benefits you expect users to get from this release.
Describe what the expected outcome is, and how you will measure it in a quantifiable way.

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1.0.0

Collaboration Patterns

Story Mapping enables and encourages story telling. Here are some specific suggestions how to encourage collaboration and discussion.

Groups: Think-Write-Explain-Place, Speak In Examples, Involve Others, Fish Bowl Style Collaboration, Talk About... and Shared Understanding

1.0.0

Think-Write-Explain-Place

Don't let ideas vaporize. During discussions, as you think of ideas, write them down before explaining them to others.
As you explain, point and gesture at the idea before you place it in the growing Story Map.

1.0.0

Involve Others

Creating a Story Map should be a collaborative process.

Use the visual representation of the Story Map as a tool to bring users, stakeholders and developers together to describe, understand and agree on their solution to the user's problems.

Get input from many users and from other people who understand the problem space.

Talk About...

Be specific. Talk about:
- Exactly which users do we mean?
- What are the different types of users?
- Who are the customers?
- Who are the other stakeholders?
- What exactly are the user tasks?
- Why does each user care?
- What could go wrong?
- What assumptions are we making?
- What questions must we answer?

Speak In Examples

When discussing how the product will work or how users will use the product, wherever possible you should:
- use specific examples of what users would do,
- exactly what data might be entered,
- exactly what users do and what users will see.
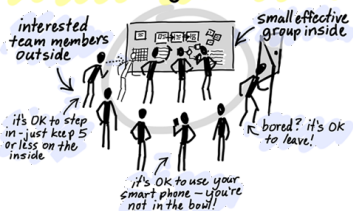
Shared Understanding

To build a software solution requires participation from those who understand your business, users and technology.

Use visualizations and discussions to build shared understanding.

I'm glad we all agree. · oh... · ah ha! · I'm glad we all agree!

Fish Bowl Style Collaboration

This is a collaboration technique to keep conversations small and productive. 3-5 people work together 'in the fish bowl' in front of the Story Map. Other people may observe. If a person wants to jump in, another person must jump out.

Fish Bowl Style Collaboration

interested team members outside · small effective group inside · it's OK to step in - just keep 5 or less on the inside · bored? it's OK to leave! · it's OK to use your smart phone – you're not in the bowl!

Building Story Maps

These cards describe a number of techniques to help create and improve a Story Map

Groups: Story Map, Opportunity Canvas, Output, Outcome and Impact, Rock Breaking and Find 'Sea Level'

Story Map

A visual tool capturing the steps users make to accomplish their goals and describing how a solution can be developed. It promotes discussion and builds a shared understanding and agreement on a solution.

Story Maps tell each user's story from left to right and decompose that story into smaller buildable parts – top to bottom. Use the map to slice out releases, learning & development strategies.

Slices · Step 1 · Step 2 · Step 3 · Step 4 · Step 5 · Step 6 · Step 7 · target outcome · target outcome
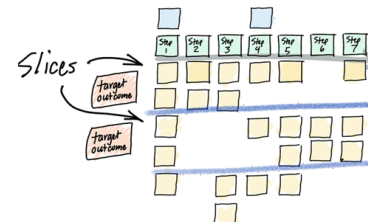
Find 'Sea Level'

When we capture user tasks they could be at many different levels of detail. Aim for *sea level* tasks:

- **Summary-level** task: a collection of smaller tasks to describe a higher-level user outcome. One outcome may require us to achieve many individual goals.
- **Sea-level** task: an 'atomic' step the user will always complete as a user goal before starting another one.
- **Task** describing one small detail to progress towards a single user goal.
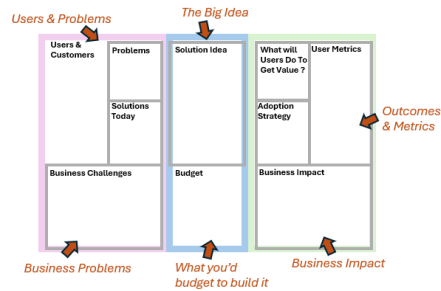
Ref: Cockburn (2001)

Opportunity Canvas

Fill the canvas collaboratively with your team, users, and other stakeholders. It will force you to expose beliefs and assumptions about your users, their problems, the solution and its budget, outcomes and the impact of building that solution.

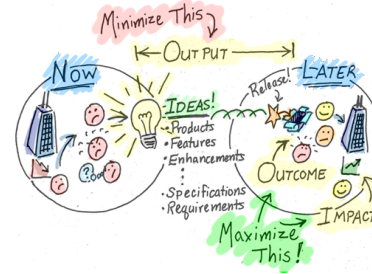Use an opportunity canvas at a feature, capability or "epic" story level

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Output, Outcome and Impact

- **Output** is the solution you will build.
- **Outcome** is measured in the usage of that solution by customers and users.
- **Impact** is measured in the subsequent return on investment that comes from using the solution.
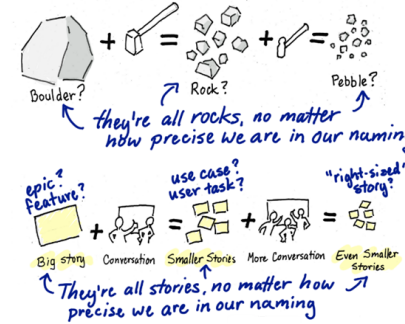

Rock Breaking

Use conversation to help break big stories down into smaller stories.
Don't worry too much about classifying different sizes of stories (e.g. epics, stories, etc) - we can break 'rocks' into 'pebbles' when we need to.

Resources

- **Jeff Patton & Associates**: Videos, Downloads and Training about Story Mapping: https://jpattonassociates.com/
- Patton, J (2014) *User Story Mapping: Discover the whole story, build the right product.* O'Reilly CA
- Cockburn, A (2001) *Writing Effective Use Cases.* Addison-Wesley, IN
- Cockburn, A (2006) *Agile Software Development: The Cooperative Game, 2nd edition,* Addison-Wesley
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