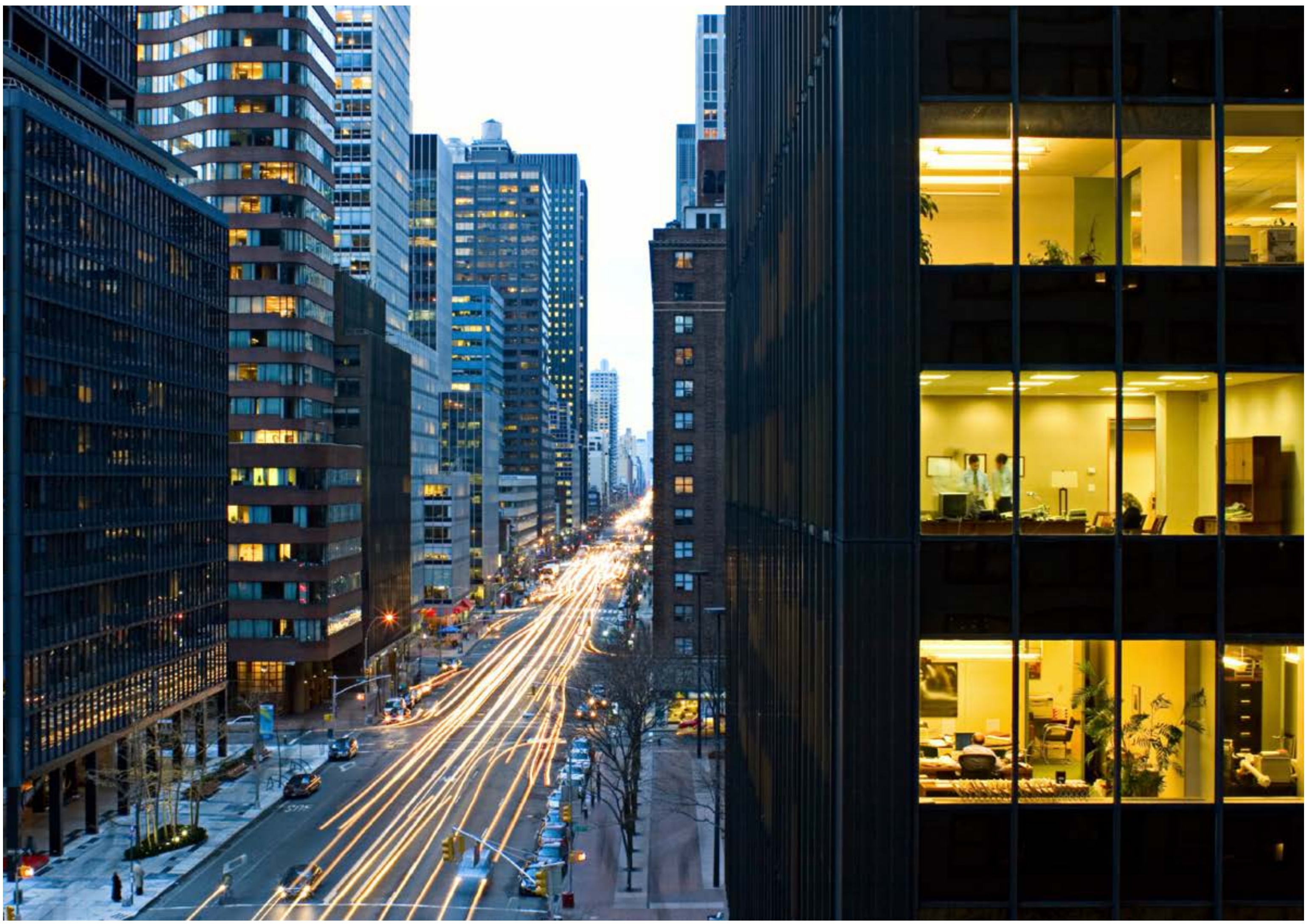
LOFT9
BUSINESS INSIGHTS

Requirements Gathering: User Stories – Not Just an Agile Tool



Requirements: The beauty of simplicity

John Dewey, the famous philosopher, psychologist, and educational reformer said, “A problem well put is half solved.” The ability to get the raw wants and needs of your customers is an art and plays a critical role in meeting your customers’ expectations. Having a proven method to help with this endeavor can be the difference between success or failure of a project. This whitepaper is an endorsement of user stories as a requirements gathering tool in any situation, under any project methodology (not just Agile), for any kind of industry, and without the need for any special knowledge. The strength in this tool is its simplicity -- all you will need are index cards or post-it notes and time with your customers. We recommend user stories for requirements gathering because:

- The process is simple, and doesn’t require much set-up or training for participants
- The process is inclusive, collaborative, builds understanding and cross-knowledge between different stakeholders
- The user story format focuses participants on the “what,” not the “how”

“New beginnings are often disguised as painful endings.”

Lao Tzu

Getting to the heart of the problem

Common reasons for failed projects are lack of support from management and conflict among stakeholders. Both issues reflect poor alignment with the goals and objecives of the project, poor communication, and lack of trust. There are many possible causes for these issues but typically only one result – a project that misses the mark addressing the problem it was supposed to solve.

So how do you make sure your project gets these things right? What method can you employ that will make your project more adaptive and result in more communication, collaboration, and information sharing across silos and departments? Consider using user stories. User stories are a powerful tool that, when used properly, will help you clarify the project’s role and align your team so that there is a cohesive understanding of what the project is going to deliver before planning even starts. User stories remove barriers to customer insights by encouraging discussions on customer experiences instead of solutions or results. Having a tool for obtaining a deep understanding of customer pain points without the distraction of implementation discussions can expose a myriad of needs and wants that would be missed if the process was not deliberate in its focus to reveal those issues.

A beginning to a better end

A project should deliver something that is going to help the business in some way. So many times, projects start implementing solutions before the business problem is understood which can result in stakeholder conflict and project results that are not what was expected by the customer. Requirements in a project describe what the project is to accomplish if it were to be successful. Requirements gathering is therefore a critical activity that if not done properly, can doom your project before it even starts. Having the right tools and methods for gathering requirements is essential if you want your project to be a success. But how can you be sure you have the correct requirements? The key to successful requirements gathering is to collaboratively work with customers on the creation of user stories. If done right, these user stories will correctly capture your customers' needs and wants organically and help you gain a fundamental understanding of what you'll need to deliver to meet and exceed your customers' expectations.

Facilitate an awakening

The user story format is derived from the agile methodology approach for gathering requirements. This approach works well for information gathering due to its ability to focus stakeholders on identifying needs and wants that are not only from their own perspective, but also from others impacted by the project. It's also effective in keeping user stories focused on the issue and not on the solution.

User stories identify wants and needs simply without requiring the knowledge of how to implement said changes. Taking the solution out of the equation helps the team concentrate efforts on the issues instead of implementation details. It takes away the necessity for them to understand infrastructure, technology, processes, etc which is liberating and allows your stakeholders to think of wants and needs that perhaps they hadn't yet acknowledged. This information is then sorted, prioritized, and fleshed out into the requirements that will be used to describe what the project will deliver.

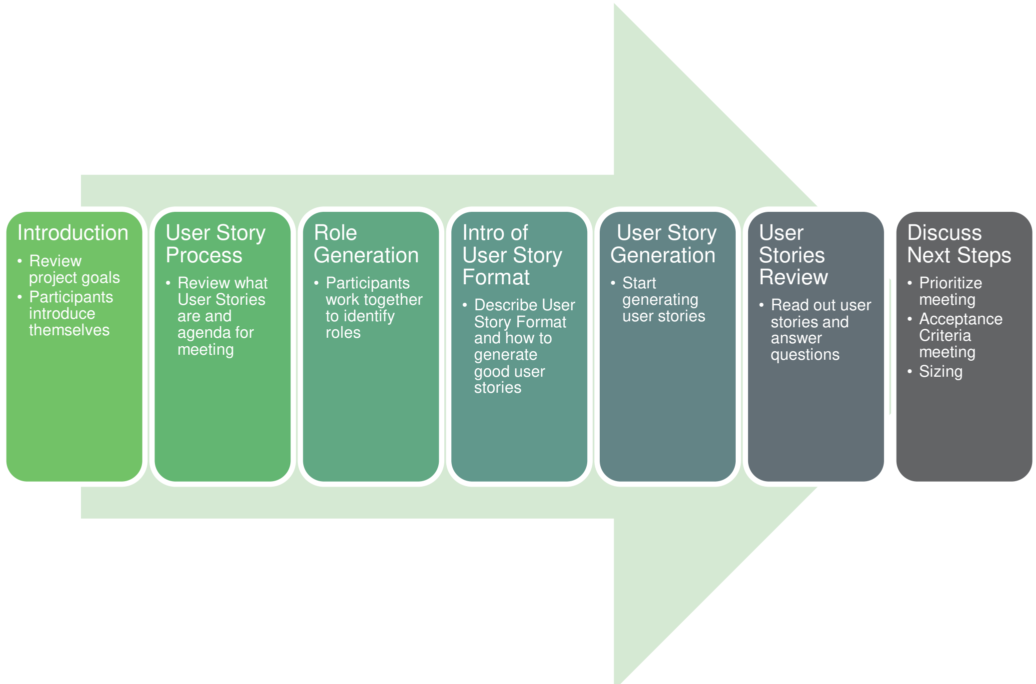
User stories: Bringing people together

To ensure the user stories obtained are a true representation of customer needs and wants, all stakeholders must participate in the requirements gathering process. This is kicked off by a user story generation workshop whose goal is to facilitate the creation of as many user stories as possible by all relevant stakeholders in all relevant roles. This meeting provides the time for your 'problem space experts' or stakeholders to generate user stories and the instruction on how to do it. The goal is to create as many user stories as possible. These user stories will then be cleaned up, fleshed out, prioritized, and sized.

Good requirements gathering using user stories clarifies the problem space by surfacing critical issues that if improved will have the highest impact on the customer experience. User stories can be used in both simple and complex projects and scales easily to fit most any need due to how easy it is to implement.

7 Steps to User Story Generation

Having a user story generation workshop is a great way to start learning about the problem space and your stakeholders. These workshops help foster engagement between stakeholders as well as serve to introduce the projects' goals and objectives. It is best to hold a workshop early in the project. Diagram 1. below illustrates the activities and discussions covered in a user story generation workshop.



1. Diagram of the 7 steps of a User Story Workshop

Facilitate your User Story Workshop for a new team by following these steps:

1. Introduction

When starting the workshop, have a quick introduction of the goals and objectives for the project. In addition, ask participants to introduce themselves by stating their names, business role, and what role they have in the project. The Product Owner should be identified ahead of the meeting and should already have a good understanding of their role in the process.

2. User Story Generation Overview

The next discussion should cover the process that will be followed for gathering user stories during the workshop. Aim to keep it simple at this stage since the learning is going to happen when it's time to create user stories later in the workshop. Simply put, the process is to collaborate on roles impacted by the project, discuss user story basics, generate user stories, then review them together. The workshop will then wrap up with a quick discussion on what happens after the workshop.

3. User Role Generation

Begin by asking "What are the roles that will be interacting with this product?" Have participants call these out while you record them on the whiteboard.

4. User Story Format Review

User Story Generation

Key Elements:

1. Use the user story format
2. Participation from all roles
3. Quantity over quality

Participants need to follow a specific format when writing their user stories. This format helps keep the focus on business needs, not design features. Write an example on the whiteboard of the user story format and explain the benefit of following it. For example, write the following on the whiteboard:

Good: (great for identifying product feature needs)

"As a [ROLE] I want [SOMETHING / FEATURE] so that [BUSINESS JUSTIFICATION]"

Better: (helps identify needs relating to actions and/or processes

"As a [ROLE] I want **to** [**DO** SOMETHING] so that **I can** [BUSINESS JUSTIFICATION]"

Have participants call out examples of each of the variables for demonstration purposes.

In addition, showing examples of user stories that are inadequate is helpful as well. User stories that group features together, provide a solution rather than addressing a want/need, or use vague non-testable descriptors should be avoided.

Below is a starting point for things to avoid. Write these down on the whiteboard to remind your participants of what a deficient user story may look like:

Things to avoid in user stories:

Design-specific

- "…I WANT A DROPDOWN…"

Multiples

- "…AND…", "…OR…", "…BUT…"

Non-testable, qualitative descriptors

"…BETTER…", "…FASTER…", "…USER FRIENDLY…", "…MORE EFFICIENT…"

A common question is "Where do I put the detailed requirements?" Explain that those are captured as acceptance criteria for each story. Request that they write down additional details if they have them on the back of the card/sticky note so the information is not forgotten. As the facilitator, you'll need to keep the focus on capturing user stories and not on acceptance criteria at this stage.

5. User Story Generation

Now comes the fun part! Have the participants start generating user stories by writing down their ideas in the user story format described earlier on the index cards/sticky notes supplied using the following guidelines:

- Use the roles the team just generated
- Use the user story format we just reviewed
- Write a single user story per card/sticky note
- You can write user stories for other roles besides your own

Tips to help stakeholders

Generate more User Stories

1. Don't try to be perfect
2. Think about other roles and perspectives
3. Don't worry about details

6. Read out user stories

For this step, each user story is read out loud and to all participants. Participants are asked to verify if the user story meets all requirements for a good story. If it does, and there are no clarifying questions, it is considered approved and moved to the backlog.

If the user story isn't in the correct format or includes "things to avoid," the participants can help the writer of the user story correct it or the writer can take on correcting it themselves and reading it out loud when it's ready.

In addition, while the user stories are read, participants are asked to remove duplicates from their stack.

Many times, the reading of the user stories out loud will spur the creation of more user stories for either their own role or for others. This is a good thing and should be encouraged. Participants should write out the new user story in real time and have it go through the vetting process just like the others.

You know when you are done when all user stories have been vetted and participants agree there are no big areas that were missed.

This step is very important because it provides the following benefits:

- Verifies the user stories meet the guidelines
- Encourages involvement of all participants which fosters investment in the project
- Provides an avenue for asking questions to gain understanding of features considered by all roles. This helps participants better understand others' pain points and perspectives which helps with stakeholder alignment
- Further demonstrates important user story principles by providing an opportunity for more practice. After a while, participants become very good at quickly finding "bad" user stories, and finding viable solutions to turn it into a good user story.

7. Wrap-up

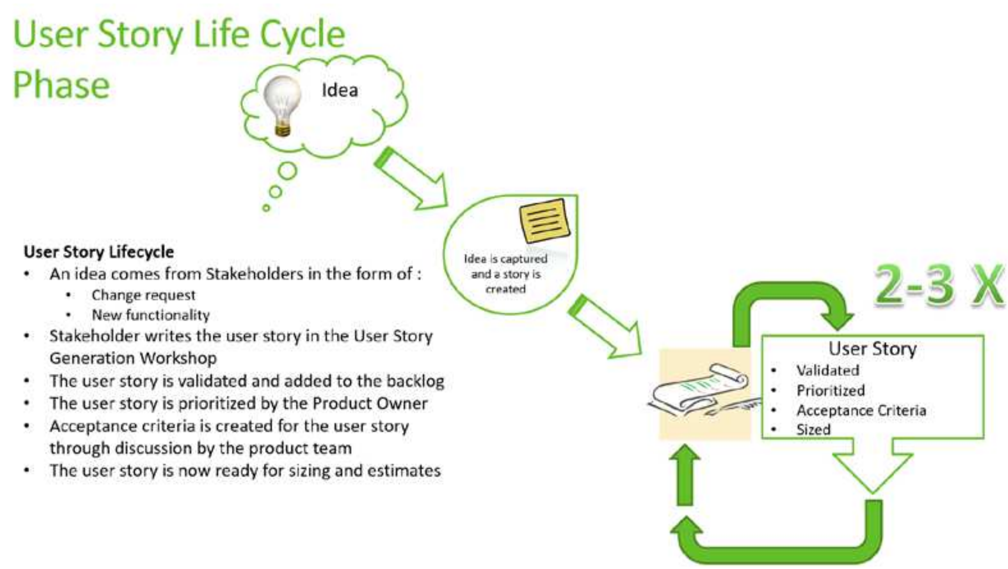
After the completion of the user story vetting process, close the workshop with a quick review of what to expect moving forward. The next steps are to:

a. Prioritize the user stories (typically done by the product owner)

b. Create acceptance criteria for each user story

c. Size each user story (done by project team with help from product owner as needed)

Once these are done, the next step is to start planning which user stories will be completed when and what tasks are required for each to complete them. For projects using Agile, this meeting will be the sprint planning meeting.



2. User Story Lifecycle Diagram

Where you go from here

The concept of user stories was introduced for the Agile world but over the past few years, user stories are used in all industries and across many methodologies.

For instance, one of our clients that followed a waterfall methodology needed help with identifying requirements for a timekeeping and invoicing tool. Identifying these requirements had been difficult due to the need to incorporate federal and state regulations as well as internal policies into these requirements. To help stakeholders with this task, we used user stories to focus stakeholders on how they wanted to interact with the tool instead of trying to incorporate the regulations and internal policies right away. Initially, their user stories were simple requirements that represented what they needed to accomplish. We then revised the requirements with the specific constraints introduced by the regulations and policies they needed to adhere to.

Here are the steps we followed to create user stories:

Step 1: Identify the simple user story that addresses a user action that is impacted by a federal regulation. For instance, one federal regulation stated that "Labor must accurately be reported daily for the calendar date that the work was performed." A user story that came from that policy was a need to be able to submit time late in a way that was compliant. The user story looked like this:

As a User

I want to be able to submit my time late

So that my time is compliant with our policies

Step 2: Next, this user story was rewritten to include more specific information on two items: 1.) What does the user need in order to complete the action successfully 2.) Which policy or regulation is being addressed by the user story. After further discussion and clarification with the stakeholders, it was determined that they needed a way to enter a reason for the late submittal that could be reviewed for compliance. The user story was then updated to reflect this new need and specific regulation addressed as follows:

As a User

I want to include a late reason when I submit my time late

So that my time is compliant with the federal regulations

Step 3: Now that the requirement has the correct rule incorporated in it, create an acceptance criteria that will sufficiently test the requirement. Include any relevant exceptions.

Acceptance Criteria:

Given that I am submitting a late labor entry

When I submit my time after 11:59 PM on the date the labor is for

Then I will be able to choose a late reason

The reason codes that should be selected are:

- Access to Tool

Right tool for elevated results

Gathering requirements is a critical activity that if not done properly, can doom your project before it starts. Having the right tools and approach for gathering requirements regardless of the project methodology you are using is essential to elevate project results. User stories is a proven method that will surface the wants and needs organically and collaboratively from your customers allowing them to feel heard and understood. This will provide better requirements resulting in stakeholder alignment and trust in the project early on which sets a path to higher customer satisfaction and higher product quality. Use user stories and elevate your customer experience.

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Get the complete story

If you like what you've read, we invite you to meet with us to get the complete Loft9 story—and how it can help make your business more effective.

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> Bandwidth – our Staffing Services provide a wide range of client-ready resources that seamlessly integrate with our clients' teams, providing the right experience at the right time in business operations and information technology.
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It's the experience.

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