

billing group.

Plan Mbr Info

benefits

Benefits

Spouse/
dependent

Select
Billing group

Add Member

Web page
proof of

Select
Life / Disability?

Enter
spousal
info

- prevent
lock
FILE

User Story Mapping in Practice

and confirm/
validate

PATN
DISPLAY

p.73

Determine
Plan Coverage
and display
options

Enter
Employment
Info

p.53

Division

A cartoon illustration of a brown squirrel with a bushy tail and a white belly. The squirrel is standing on its hind legs, holding a large white rectangular sign with both front paws. The background is a solid orange color.

Steve Rogalsky



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Steve.Rogalsky@protegra.com



A

Winnipeg

Ontario

Quebec

Calgary

Edmonton

Vancouver

Washington

Montana

Oregon

Idaho

Wyoming

San Francisco

California

Los Angeles

San Diego

Phoenix

Colorado

Utah

Kansas

United States

New Mexico

Oklahoma

Dallas

Texas

San Antonio

Arkansas

Mississippi

Alabama

Louisiana

Tennessee

Louisville

Kentucky

West Virginia
Virginia

North Carolina

South Carolina

Georgia

Florida

District of Columbia

Delaware
Maryland

New Jersey
Connecticut

New York

Pennsylvania

Ohio

Indiana

Illinois

Chicago

Michigan

Toronto

Montreal

New York

Ohio

Pennsylvania

New York

Rhode Island

Connecticut

New Jersey

Delaware

Maryland

Manitoba

Alberta

British Columbia

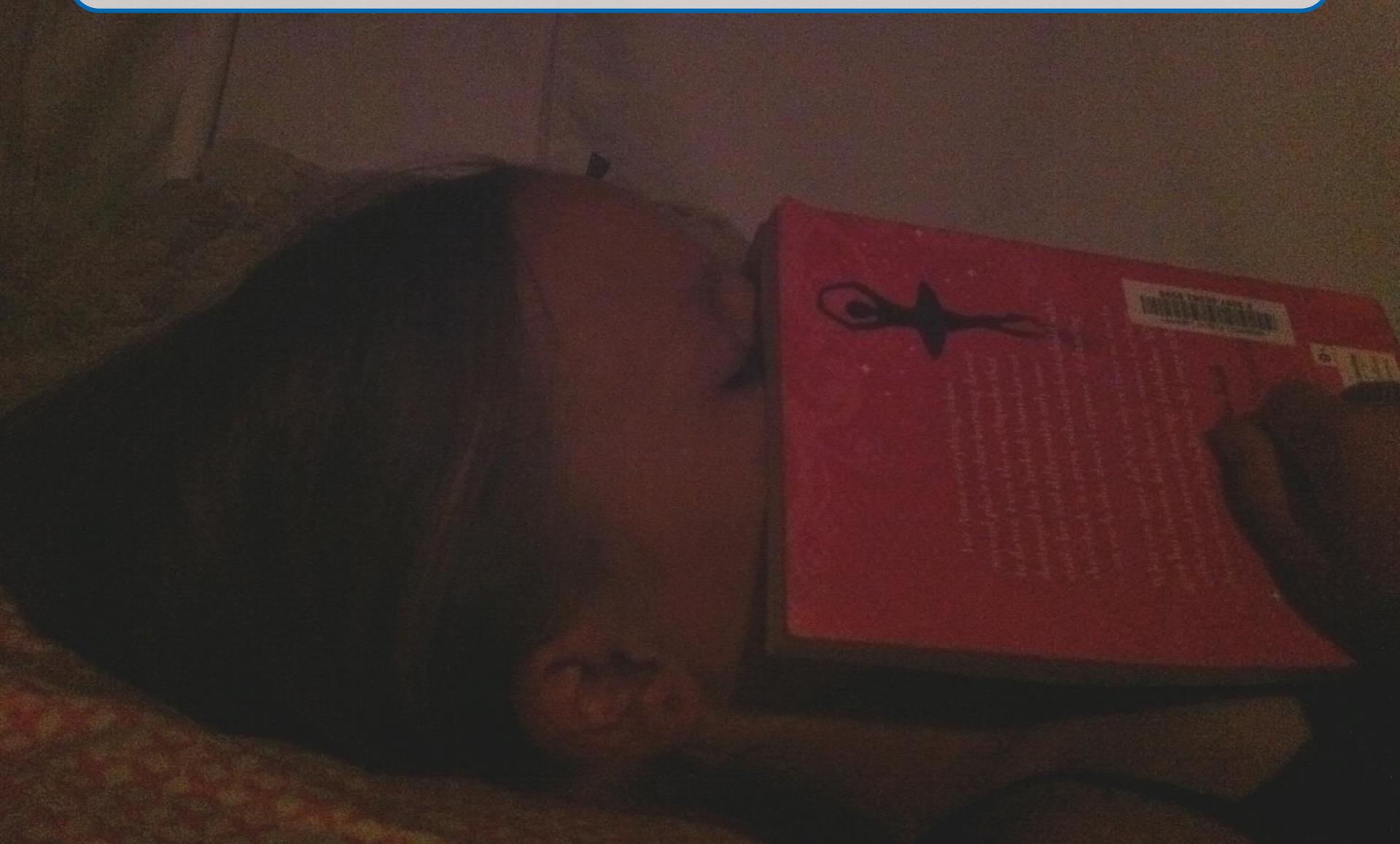
**At Protegra we
employ agile and
lean techniques to
give our clients an
advantage – to leap
out of the bowl.**

**info@protegra.com
blog.protegra.com
www.protegra.com**

Protegra Advantage



Story Time!



My First “Agile” Project

Retail costing/pricing system

Item Search	Item Maintenance	Factor Maintance	Costing Engine	Pricing Engine	Cost/Price Prototyper

My First “Agile” Project

Retail costing/pricing system

Item Search	Item Maintenance	Factor Maintance	Costing Engine	Pricing Engine	Cost/Price Prototyper
A++					

A++

My First “Agile” Project

Retail costing/pricing system

Item Search	Item Maintenance	Factor Maintance	Costing Engine	Pricing Engine	Cost/Price Prototyper
A++	B+				

My First “Agile” Project

Retail costing/pricing system

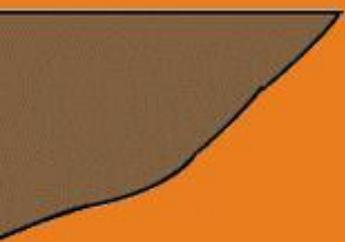
Item Search	Item Maintenance	Factor Maintance	Costing Engine	Pricing Engine	Cost/Price Prototyper
A++	B	C			

My First “Agile” Project

Retail costing/pricing system

Item Search	Item Maintenance	Factor Maintance	Costing Engine	Pricing Engine	Cost/Price Prototyper
A++	B	C	F		





My First “Agile” Project

Retail costing/pricing system

Item Search	Item Maintenance	Factor Maintance	Costing Engine	Pricing Engine	Cost/Price Prototyper
A++	B	C	F		

My First “Agile” Project

Retail costing/pricing system

Item Search	Item Maintenance	Factor Maintance	Costing Engine	Pricing Engine	Cost/Price Prototyper
A++	B	C	F	F-	

My First “Agile” Project

Retail costing/pricing system

Item Search	Item Maintenance	Factor Maintance	Costing Engine	Pricing Engine	Cost/Price Prototyper
A++	B	C	F	F-	#%&#@*&!

My First “Agile” Project

Retail costing/pricing system

Item Search	What to build first	Costing Engine	Pricing Engine	Cost/Price Prototyper
A++	X Failed at iterative development			
B	X Scoping the project			
C	X Planning the project			
F	X Prioritizing and grooming the backlog			#%&%@*&!

**The goal of this life isn't to
be perfect but to be
progressively less stupid**

- Marshall Rosenberg. #nvc

Learning Outcomes

How user story mapping can help you with:



What to build first



Encouraging iterative development



Scoping the project



Planning the project



Prioritizing and grooming the backlog



Visualizing Project Progress

BONUS!

Fast forward a little bit...

Select
Billing group

- prevent if in
lockdown
FIE p. 50 498

Add Member

- tombstones
- check for duplicates
- empl info.
- emp # p. 50 499

Web page
proof of
concept:
the demo of
the wizard p. 507

Select
Life / Disability?

p. 53
p. 67

Check for
duplicates
and confirm/
validate p. 60

NO
PHN <
DISPLAY
502

Enter
Beneficiaries

p. 73

Enter
dependent
info

Division

Determine
Plan Coverage
and display
options p. 505

Enter
Employment
Info

p. 53



Another story, this time with a map

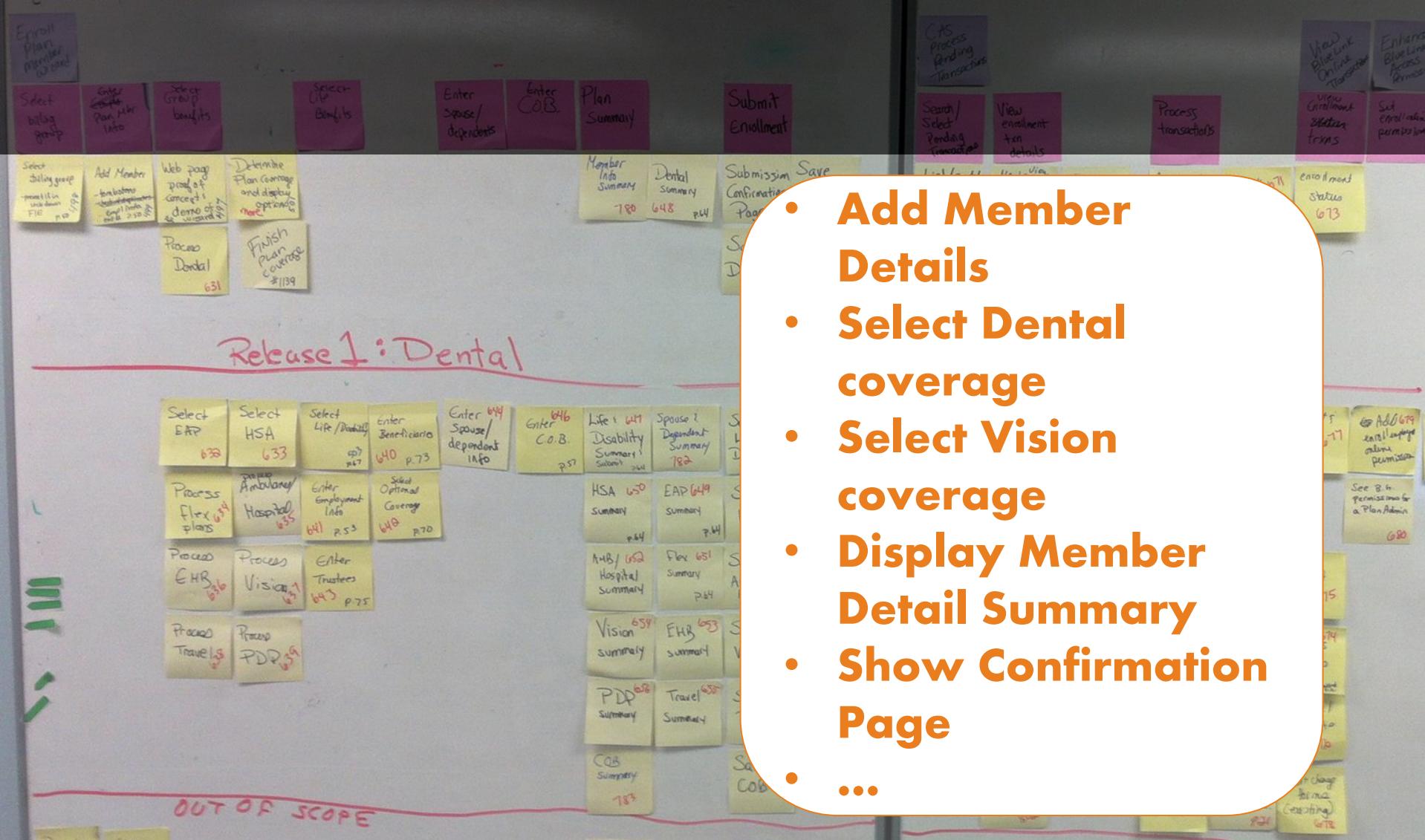
External Users will:

- **Select a Contract/Group**
- **Enter Personal Info**
- **Select Benefits**
- **Enter Dependencies**
- **View Summary**
- **Submit an Enrollment**

Internal Users will:

- **Search Submitted Enrollments**
- **View Submitted Enrollment**
- **Process Enrollment**

Things Users Will Do



- Add Member Details
- Select Dental coverage
- Select Vision coverage
- Display Member Detail Summary
- Show Confirmation Page
- ...

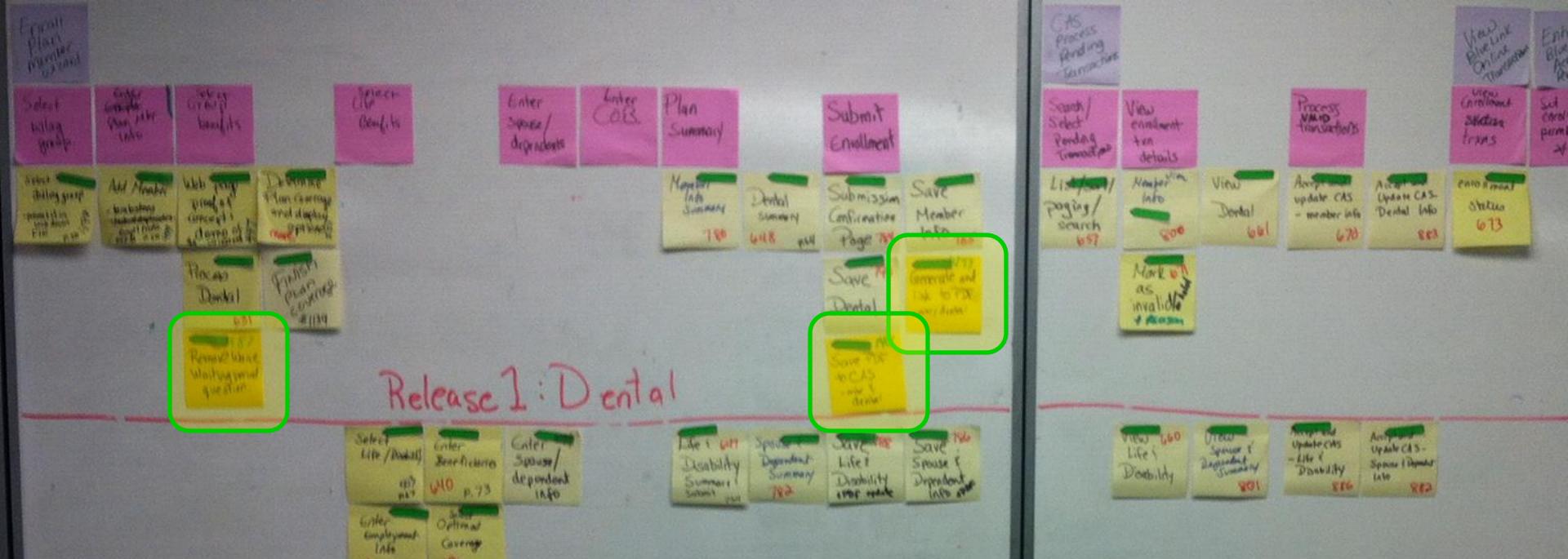
Identify User Stories



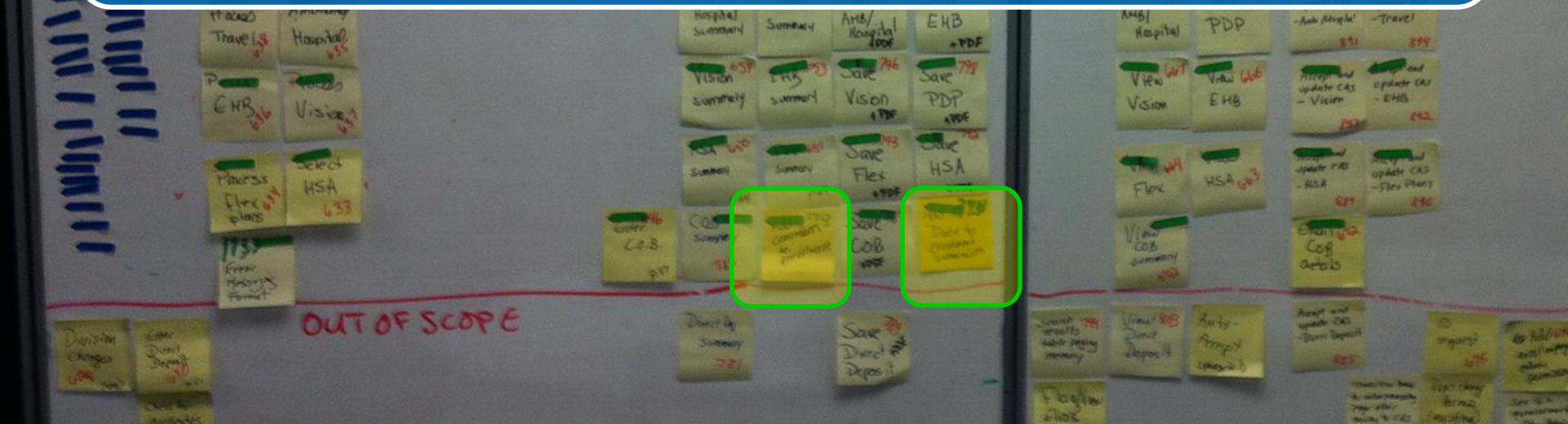
Identify Priorities. Left to Right; Top Down



Identify the Smallest Release Possible



Highlight Scope Changes



**And now... Take a look at
our Project Plan**

Green = Done

Blue = In Progress

Select
Billing group

- prevent if in
lockdown
FIE p. 50 4/98

Add Member

- tombstones
- check for duplicates
- empl info.
- emp # p. 50 4/98

Web page
proof of
concept
the demo of
the wizard 4/97

Select
Life / Disability?

p. 67

Enter
spousal
info

p. 5

Check for
duplicates
and confirm/
validate 5/00

NO
PHN
DISPLAY

Enter
Beneficiaries

p. 73

Enter
dependents
info

Visualizing our progress



The beginning

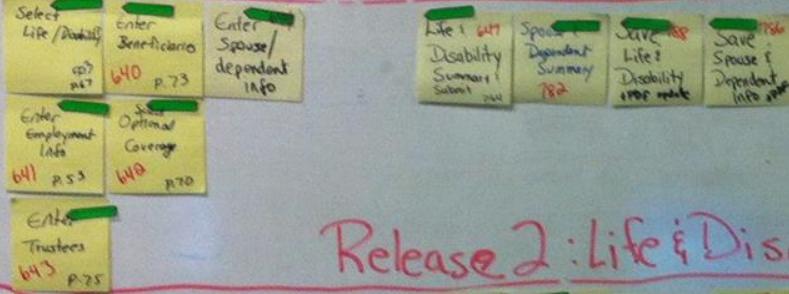
Early in the project



Enroll
Plan
Member
W/cont



Release 1: Dental



Almost Done



To Summarize...

User story mapping helped us with:

What to build first

Encouraging iterative development

Scoping the project

Planning the project

Prioritizing and grooming the backlog

Visualizing Project Progress

Milk

eggs

cheese - nacho

juice boxes

ice cream

coffee

crackers

Your Turn

carrots

tomato soup

rice crackers

chx

ground beef.

apple sauce

sugar



Organize
Email

Manage
Email

Manage
Calendar

Search
Email

File
Emails

Compose
Email

Read
Email

Delete
Email

View
Calendar

Create
Appt

Search
by
Keyword

Move
Emails

Create
and send
basic
email

Open
basic
email

Delete
email

View list
of appts

Create
basic
appt

Create
sub
field

Send
RTF e-
mail

Open
RTF e-
mail

View
Monthly
formats

Create
RTF appt

*We'll start with the 2nd row

Recipe & Grocery List Site

For:

- **People who love to create, find, share, and comment on new recipes**
- **Families who want to simplify their meal and grocery planning. (tie into local sales and inventory?)**

juice boxes
ice cream
coffee
cream
muffin cups
flour
butter
sugar

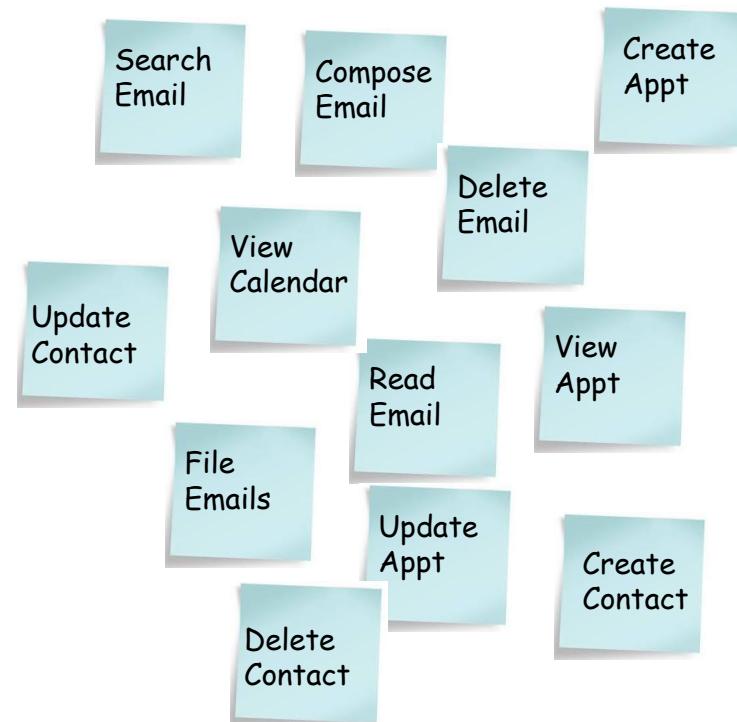
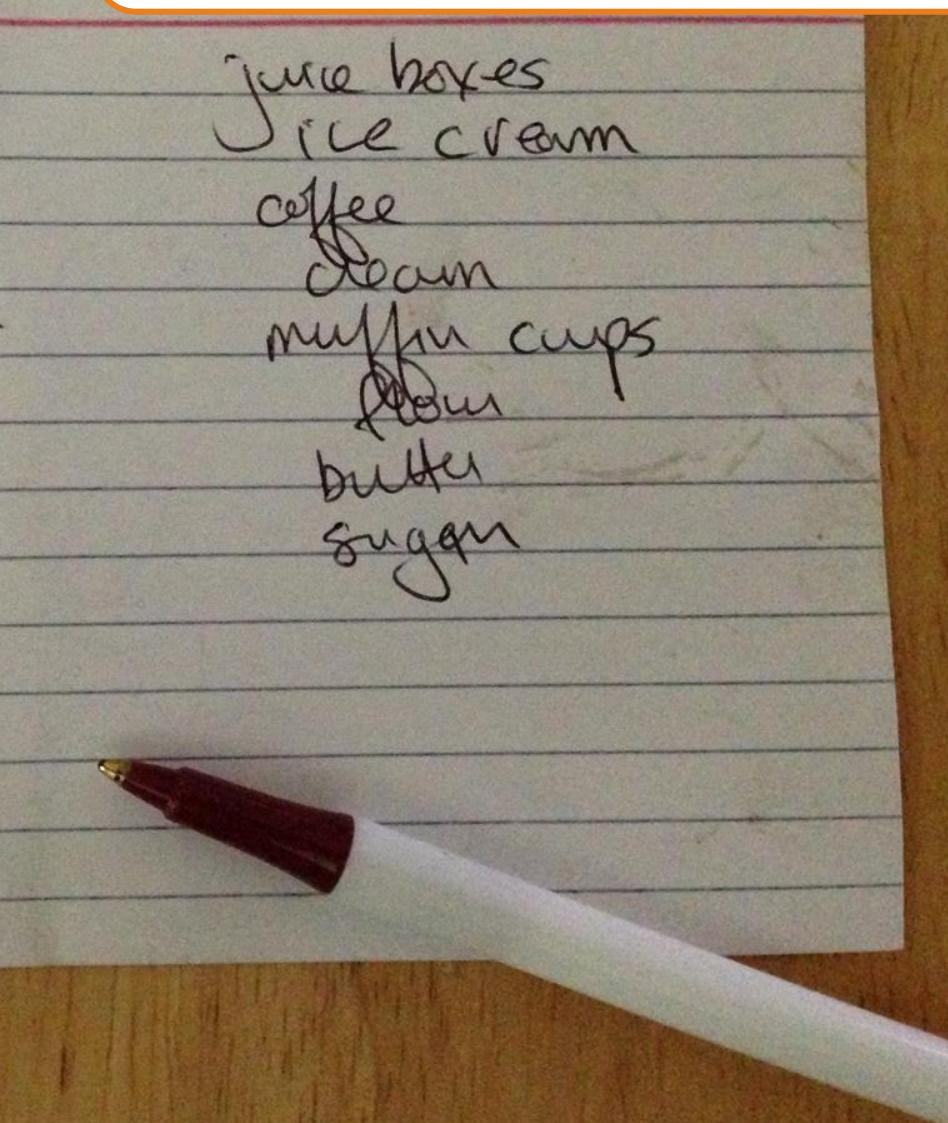


1. [silently] “Things People Do”

juice boxes
ice cream
coffee
cream
muffin cups
flour
butter
sugar

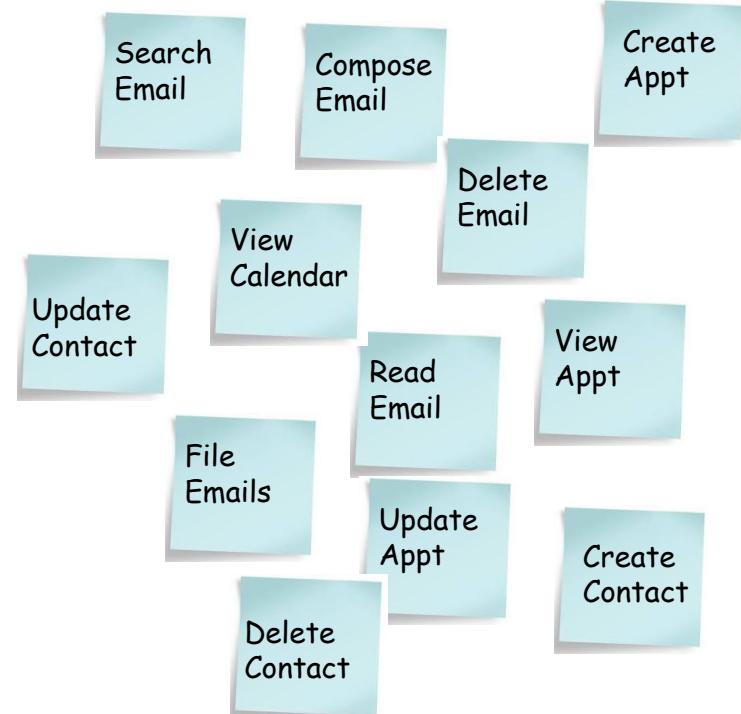


2. Read & Remove duplicates



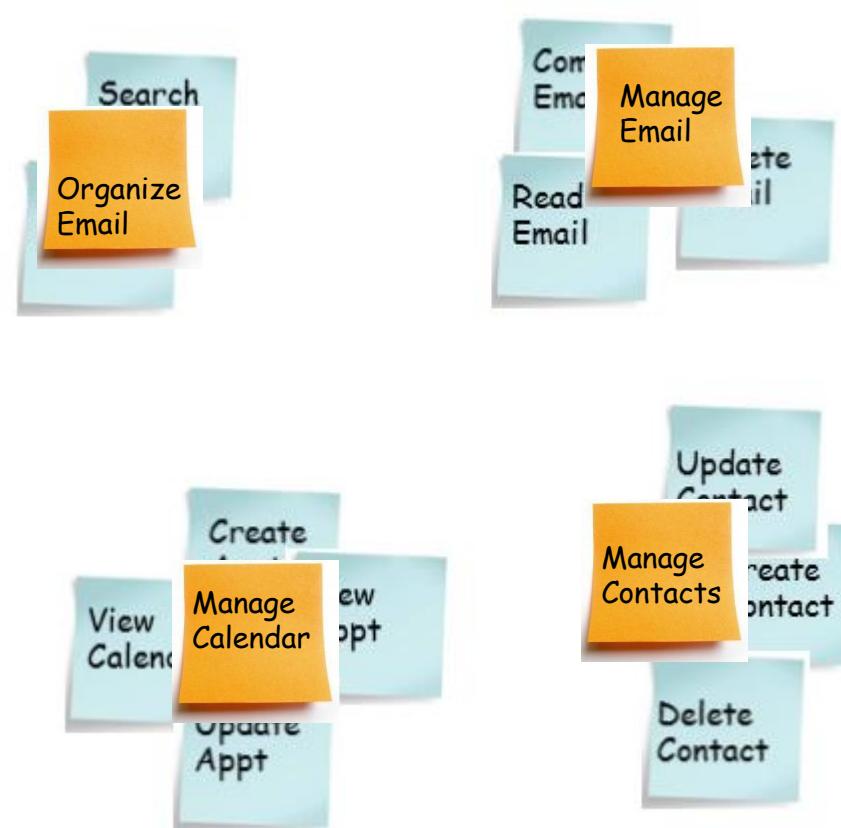
3. [silently] Group

juice boxes
ice cream
coffee
cream
muffin cups
flour
butter
sugar



4. Name your groups

juice boxes
ice cream
coffee
cream
muffin cups
flour
butter
sugar



5. Arrange left to right

chx
ground beef.
apple sauce



Organize
Email

Manage
Email

Manage
Calendar

Manage
Contacts

Search
Email

File
Emails

Compose
Email

Read
Email

Delete
Email

View
Calendar

Create
Appt

Update
Appt

View
Appt

Create
Contact

Update
Contact

Delete
Contact

USM Lessons, Tips, Notable Things

Select
Billing group

- prevent if in
lockdown
FIE p. 50 498

Add Member

- tombstones
- check for duplicates
- empl info.
- emp # p. 50 499

Web page
proof of
concept:
the demo of
the wizard p. 50 497

Select
Life / Disability?

p. 53
p. 67

Check for
duplicates
and confirm/
validate p. 60

NO
PHN <
DISPLAY
502

Enter
Beneficiaries

p. 73

Enter
dependent
info

Division

Determine
Plan Coverage
and display
options p. 50

Enter
Employment
Info

p. 53

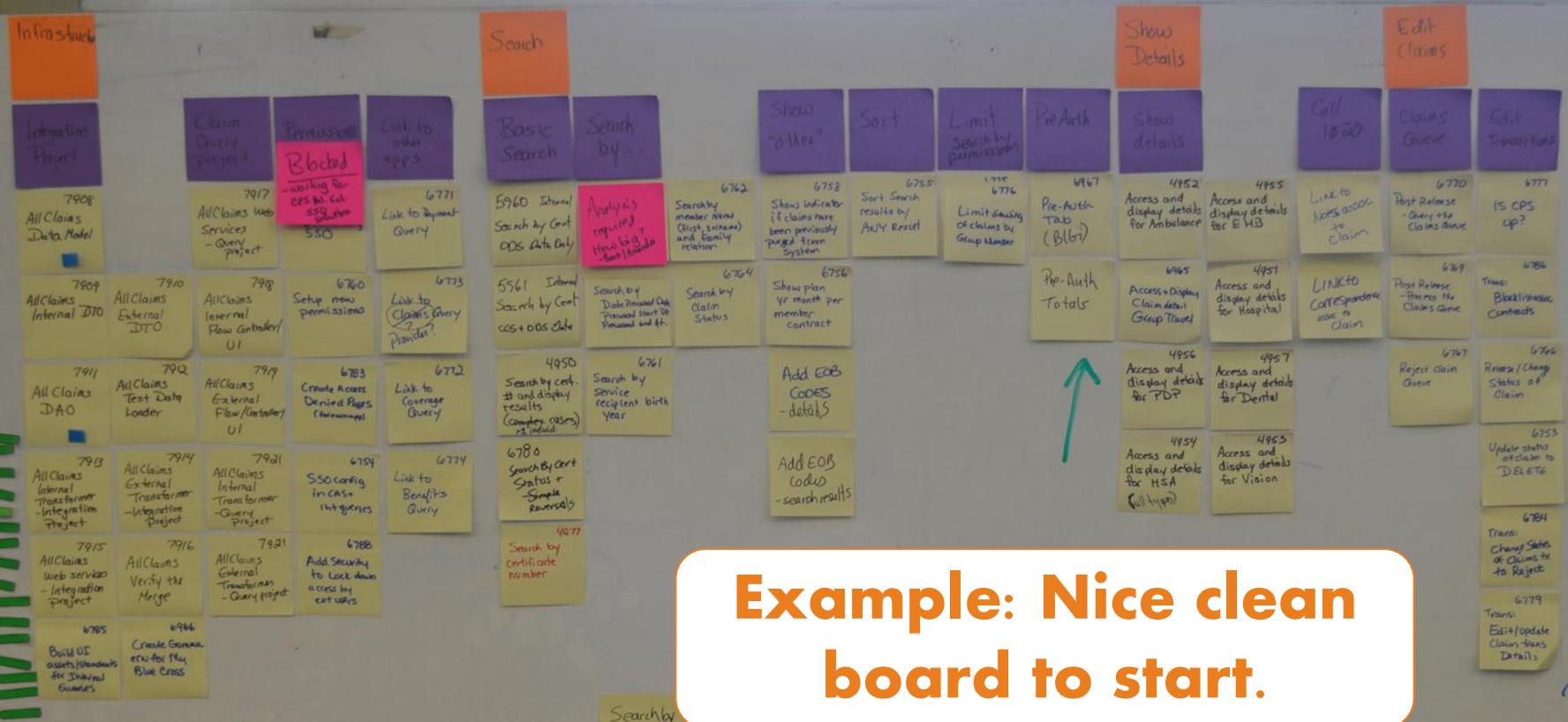
#Planning #Scoping #Prioritizing #Grooming



#1 Visualization is awesome

#VisualizeProgress

My
Query



Example: Nice clean
board to start.

ISSUES :

CAS Skin?	Data Dictionary
Possible UI Change Accordion	Card

Analysis & Design

WIP	Ready 4 dev.
-----	--------------

Development

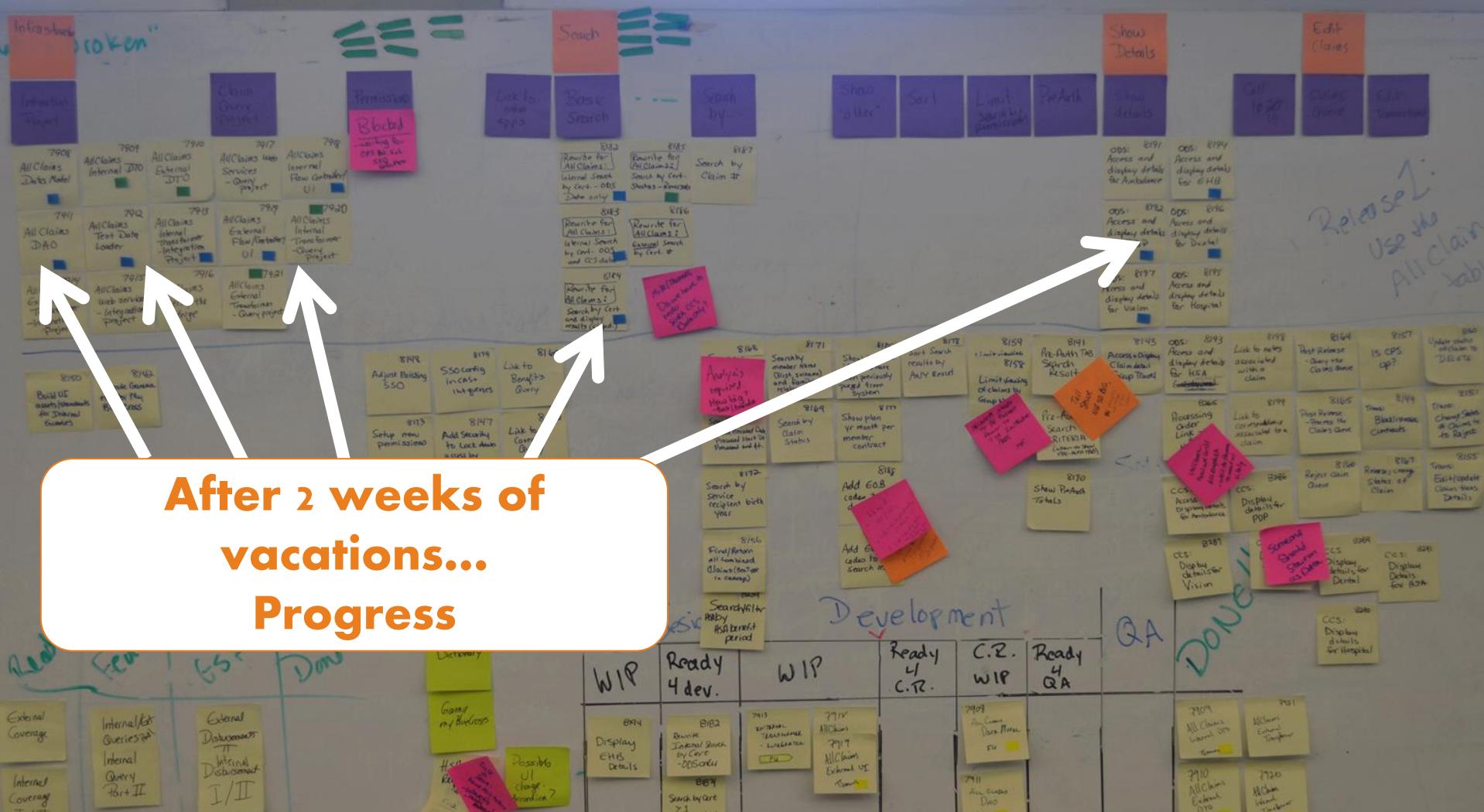
WIP	Ready 4 dev.	Ready 4 dev.	C.R. WIP	Ready 4 QA
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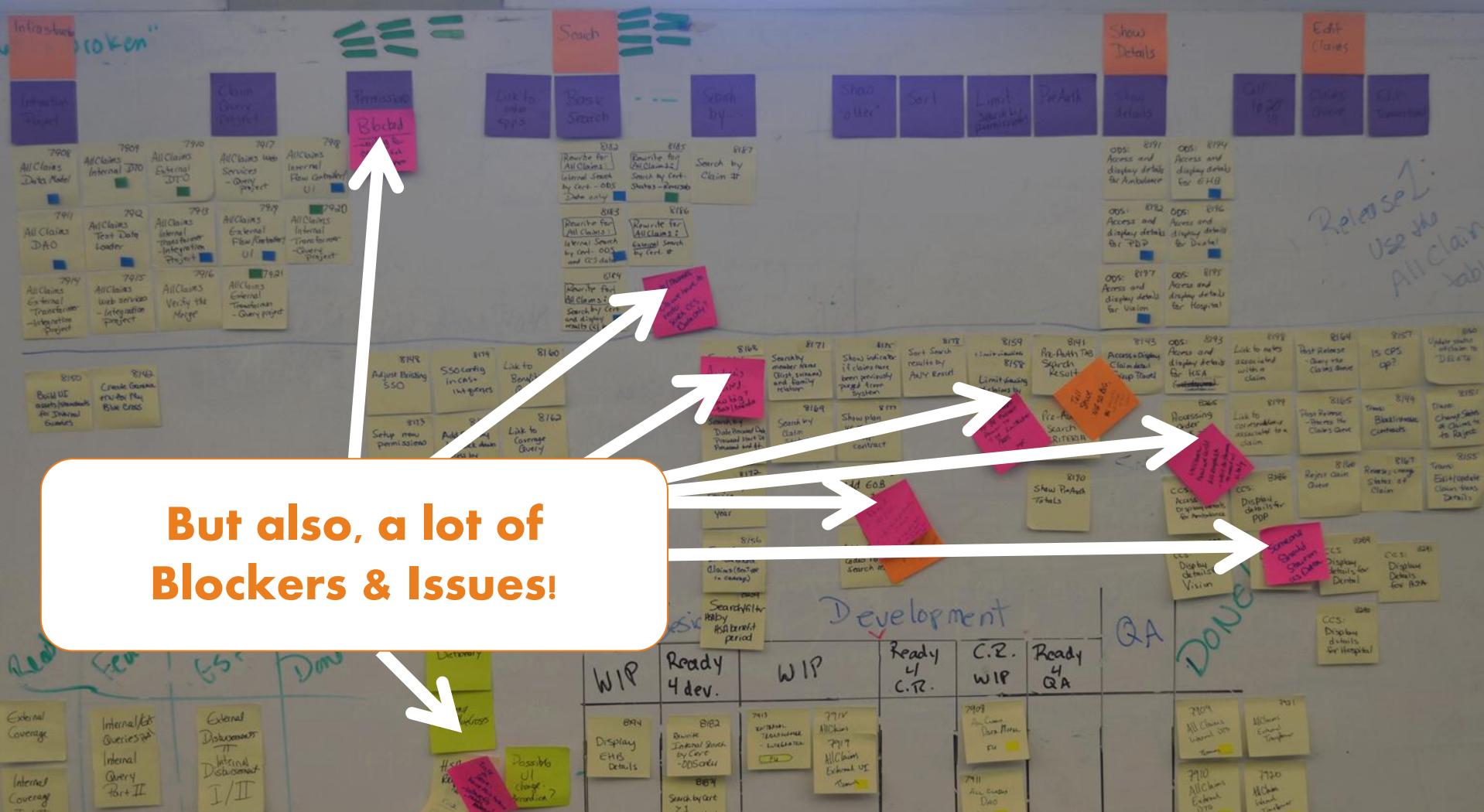
QA

DONE!!

#1 Visualization is awesome

#VisualizeProgress



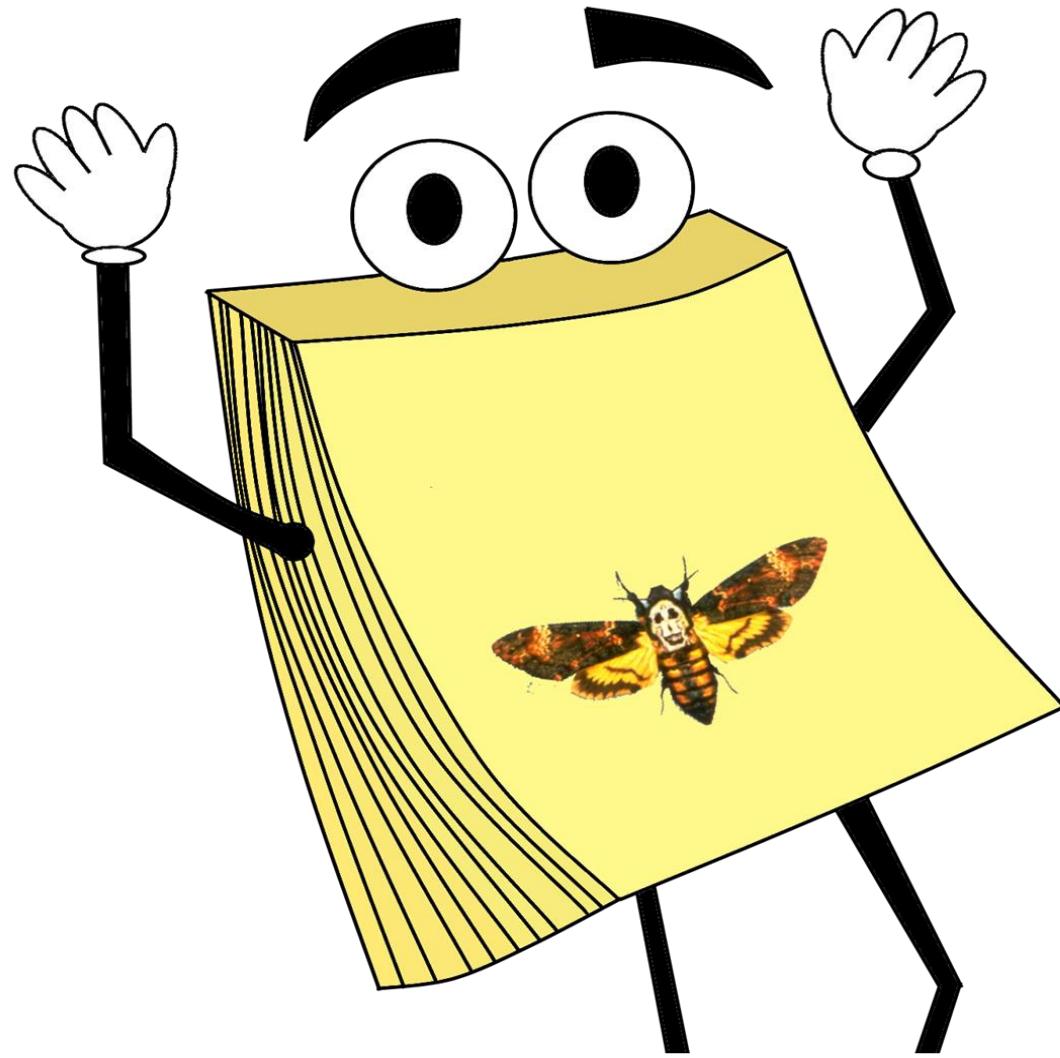


#1 Visualization is awesome

Able to view
full scope
of the
project

**"This visualization stuff,
it's going to be good."**

- CEO/Owner



#2 Silent Brainstorming FTW

Login	Session Info	Survey Info		Speaker Info	Other
Login in some fashion.	See the list of sessions	See info for a specific session @	Respond to a survey for the whole conf.	Once a user has submitted a response to a survey, they can see the overall aggregate results	See info for a specific speaker @
Basic list of sessions	Show basic sessions info	Basic survey/ eval. did you like it Y/N		Basic list	Show bio

Nope. Why? Cognitive Ease

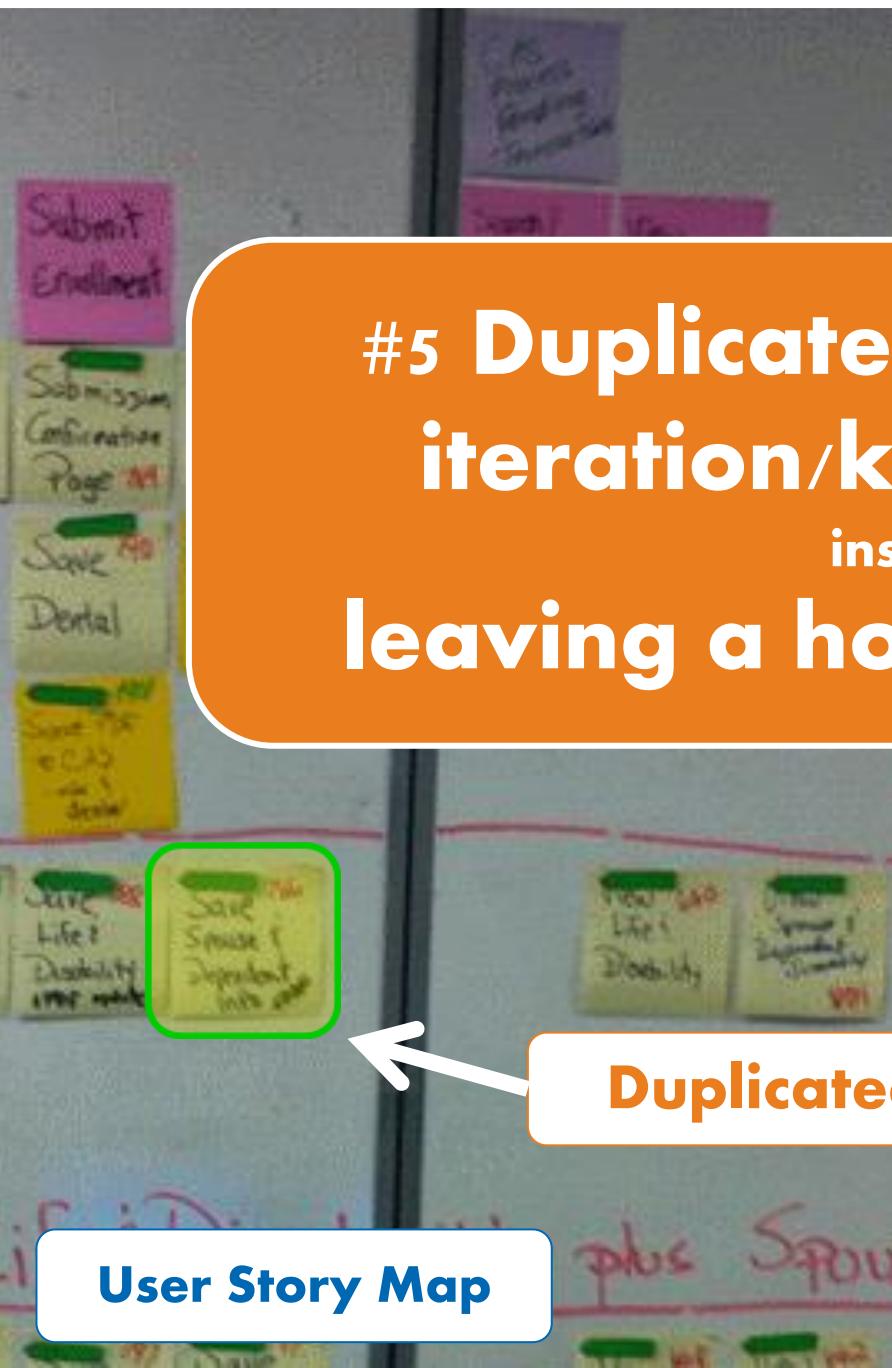
Steve Rogalsky

Login w/ password	Show Sessions in Schedule format	Add session location	Survey for the conference	Other Y/N	See survey results for a session	Show Picture	Show conference map	Show conference twitter feed
Forgot password	List of sessions by Track			Text responses (comments)	See survey results for the conference	Show Social media info	Show sessions per room	Allow user to tweet about conference

#3 USM (Backlog) as waste?



#4 White board space is important



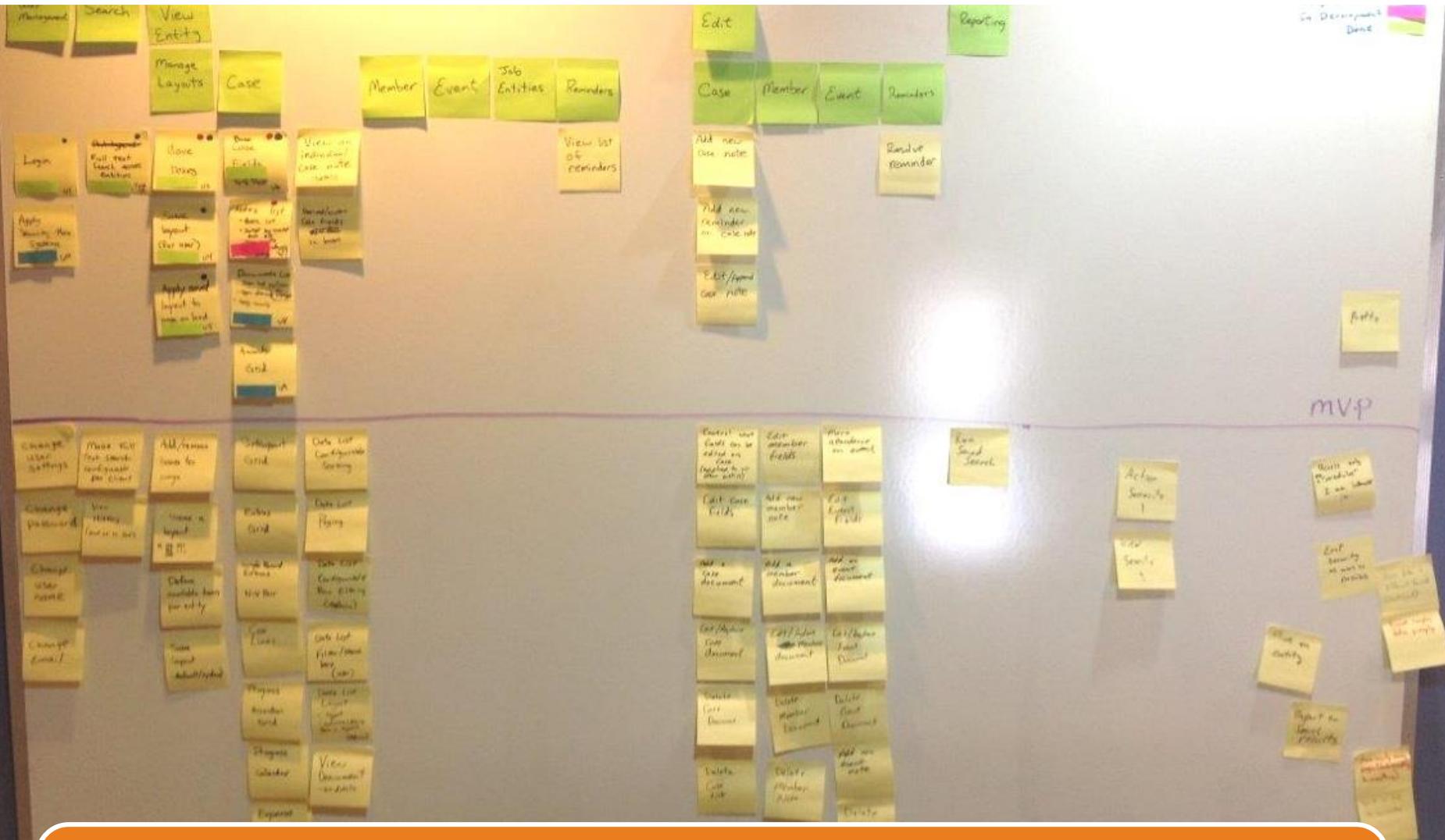
User Story Map



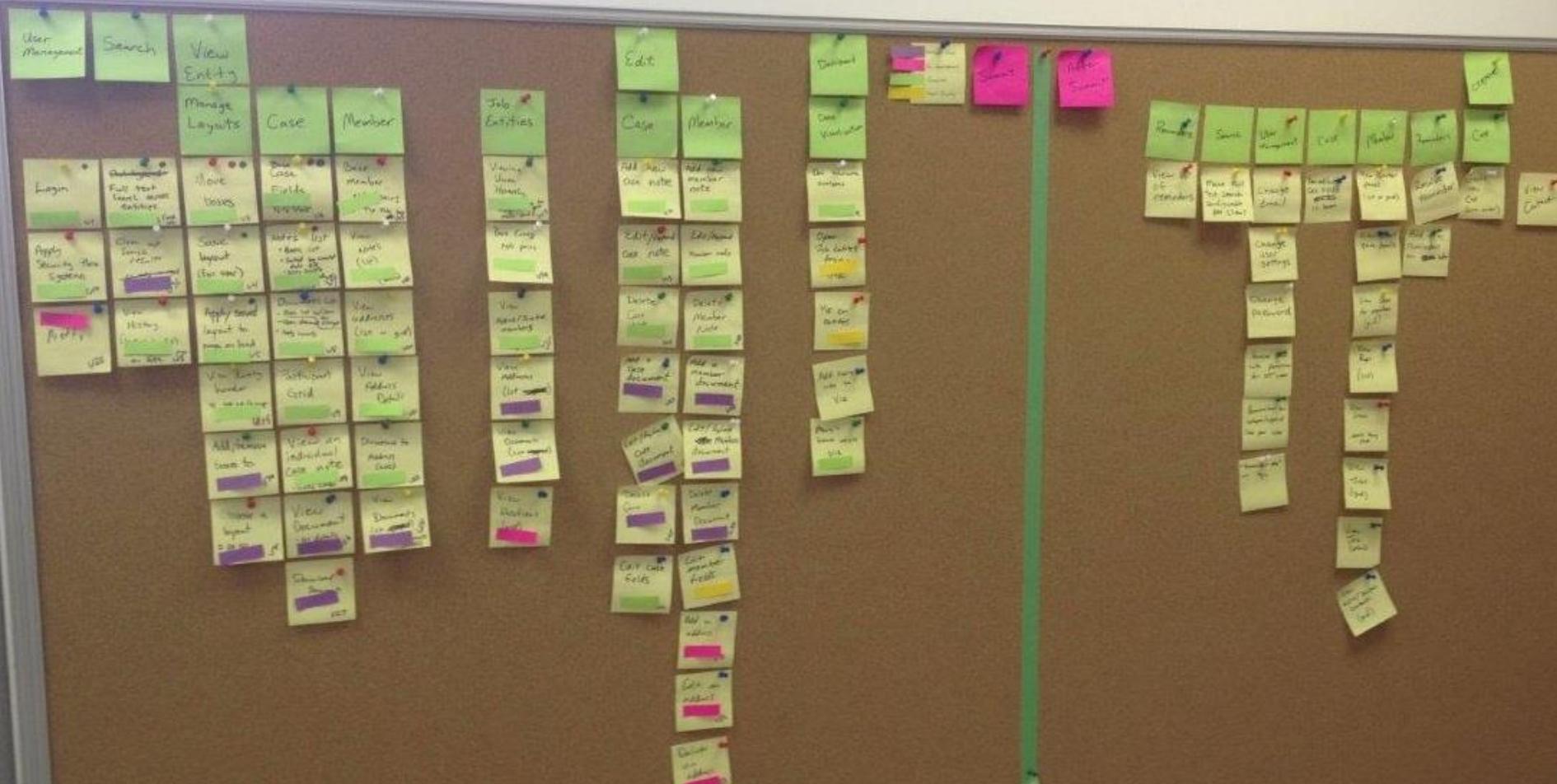
Kanban board

#5 Duplicate cards on your iteration/kanban board
instead of
leaving a hole in your map

#Planning #WhatToBuildFirst

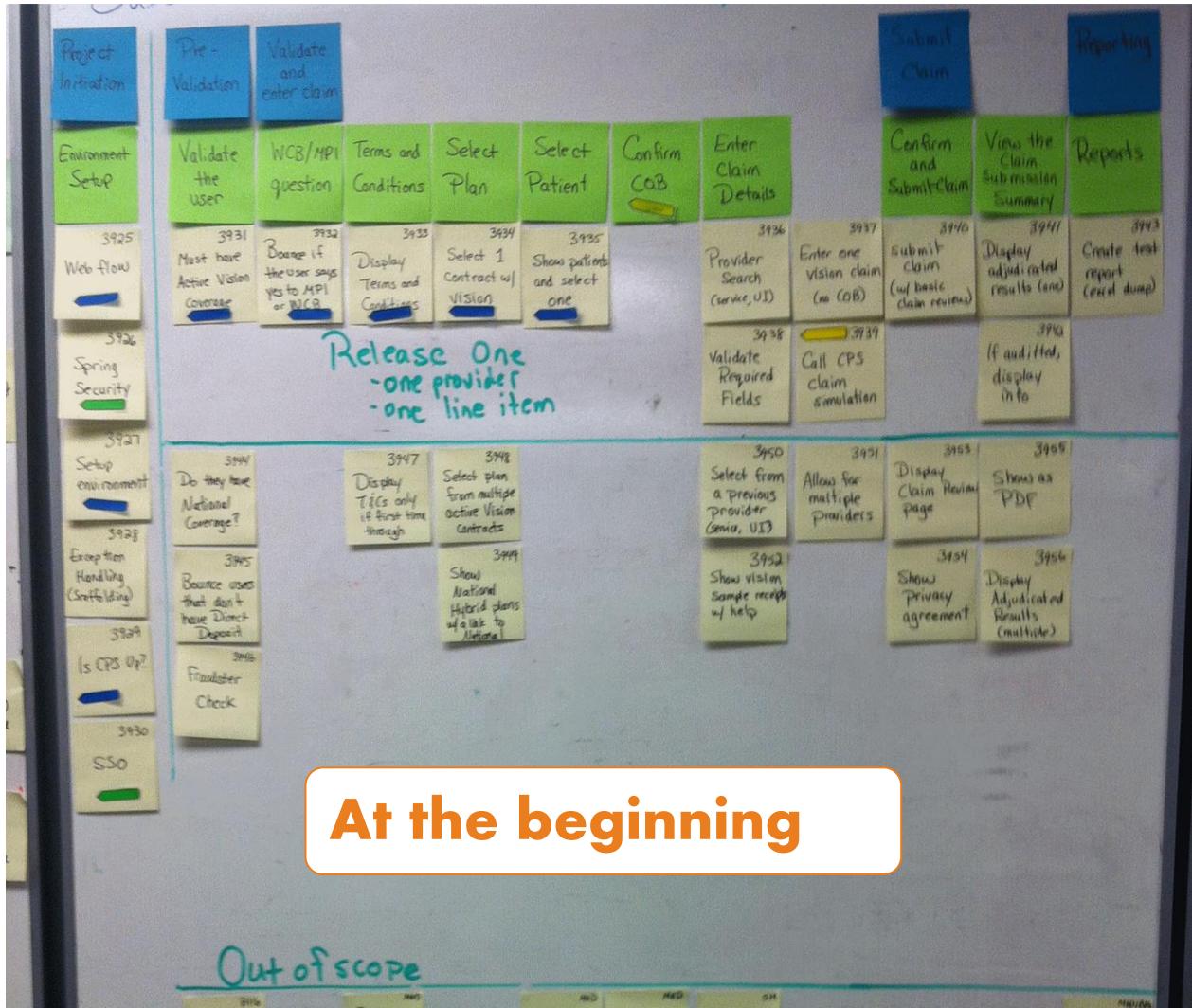


#6 USM as MVP?



#6 USM as MVP!

#Scoping



#7 Effective for projects with very little scope change

#Scoping

Subscriber Vision ~~use new taxonomy~~

Project Initiation	Pre-Validation	Validate and enter claim							Submit Claim	Reporting
Environment Setup	Validate the user	WCB/MPI question	Terms and Conditions	Select Plan	Select Patient	Confirm COB	Enter Claim Details	Confirm and Submit-Claim	View the Claim Submission Summary	Reports
3925 Web flow	3931 Must have Active Vision Coverage	3932 Bounce if the user says yes to MPI or WCB	3933 Display Terms and Conditions	3934 Select 1 Contract w/ Vision	3935 Show patients and select one		3936 Provider Search (service UI)	3937 Enter one vision claim (no COB)	3940 submit claim (w/ basic claim review)	3941 Display adjudicated results (one)
3926 Spring Security							3938 Validate Required Fields	3939 Call CPS claim simulation		3942 If audited, display info
3927 Setup environment	3945 Bounce users that don't have Direct Deposit	3947 Display T&Cs only if first time though	3948 Select plan from multiple active Vision	7357 Confirm COB		3950 Select from a Previous Provider	3951 Allow for multiple Providers	3953 Display Claim Review page	3955 Show as PDF	
3928 Exception Handling (Scaffolding)								3954 Show Privacy agreement	3956 Display Adjudicated Results (multiple)	
3929 Is CPS Up?	3946 Fraudster Check									
3930 SSO										

Release One
-one provider
-one line item

Half way done. One new card

Subscriber Vision ~~use new taxonomy~~

Project Initiation	Pre-Validation	Validate and enter claim						Submit Claim	Reporting	
Environment Setup	Validate the user	WCB/MPI question	Terms and Conditions	Select Plan	Select Patient	Confirm COB	Enter Claim Details	Confirm and Submit Claim	View the Claim Submission Summary	Reports
3925 Web flow	3931 Must have Active Vision Coverage	3932 Bounce if the user says yes to MPI or WCB	3933 Display Terms and Conditions	3934 Select 1 Contract w/ Vision	3935 Show patients and select one	3936 Provider Search (service UI)	3937 Enter one vision claim (no COB)	3940 Submit claim (w/ basic review)	3941 Display adjudicated results (one)	
3926 Spring Security						3938 Validate Required Fields	3939 Call CPS claim simulation		3942 If audited, display info	
3927 Setup environment	3945 Bounce users that don't have Direct deposit	3946 Fraudster Check	3947 Display T&Cs only if first time through	3948 Select plan from multiple active Vision contracts	7357 Confirm CFA	3950 Select from previous provider ID	3951 Allow for multiple providers	3953 Display Claim Review page	3955 Show as PDF	
3928 Exception Handling (Scaffolding)								3954 Show Privacy agreement	3956 Display Adjudicated Results (multiple)	
3929 Is CPS Up?										
3930 SSO										

Release One
- one provider
- one line item

Almost done. Still only one new card.

Subscriber Vision Use new taxonomy *

Project Initiation	Pre-Validation	Validate and enter claim							Submit Claim	Reporting
Environment Setup	Validate the User	WCB/MPI question	Terms and Conditions	Select Plan	Select Patient	Confirm COB	Enter Claim Details	Confirm and Submit Claim	View the Claim Submission Summary	Reports
3925 Web flow	3931 Must have Active Vision coverage	3932 Bounce if the user says yes to MPI or WCB	3933 Display Terms and Conditions	3934 Select 1 Contract w/ VISION	3935 Show patients and select one	3936 Provider Search (service UI)	3937 Enter one vision claim (no COB)	3940 submit claim (w/ basic review)	3941 Display adjudicated results (one)	
3926 Spring Security						3938 Validate Required Fields	3939 Call CPS claim simulation		3942 If audited, display info	
3927 Setup environment	3945 Bounce users that don't have Direct Deposit	3947 Display T&Cs only if first time through	3948 Select plan from multiple active Vision traits	7357 Confirm CER	3950 Select from a previous provider name, SIS	3951 Allow for multiple Providers	3953 Display Claim Review page	3955 Show as PDF		
3928 Exception Handling (Scaffolding)	3946 Fraudster Check						3954 Show Privacy agreement	3956 Display Adjudicated Results		
3929 Is CPS Up?										
3930 SSO										

Release One
-one provider
-one line item

Done. Still only one new card.

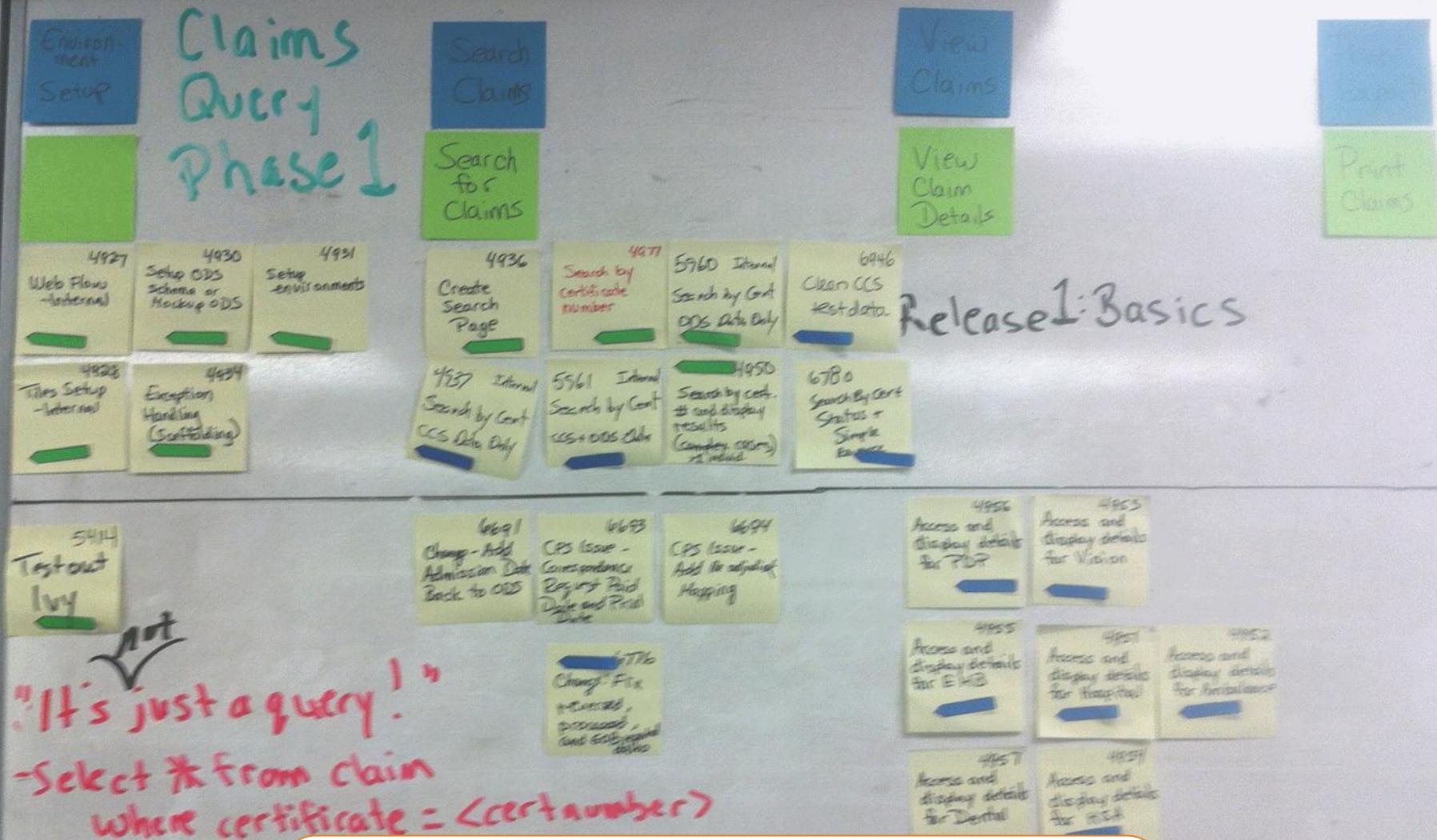


#8 Effective for projects with lots of scope change

#Scoping



After completing the first few stories, we realized this project was *way* bigger than we knew.



We quickly scaled it down to a version that still (barely) met the minimum project goals

#9 What to build first is key...

A photograph showing a stack of thin, green apple slices arranged in a spiral on a white plate. To the left of the stack, a whole, unpeeled green apple is partially visible, showing its stem and a few leaves. The background is a plain, light-colored surface.

“Most of the time, we can create a horizontal slice of the whole application in one or two iterations” – Jeff Patton

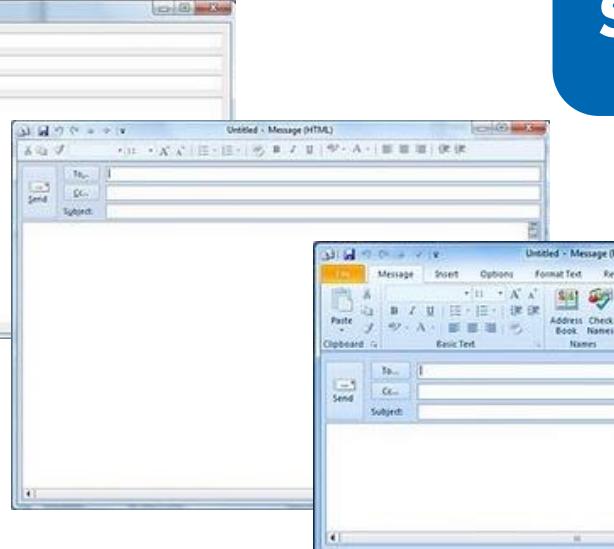
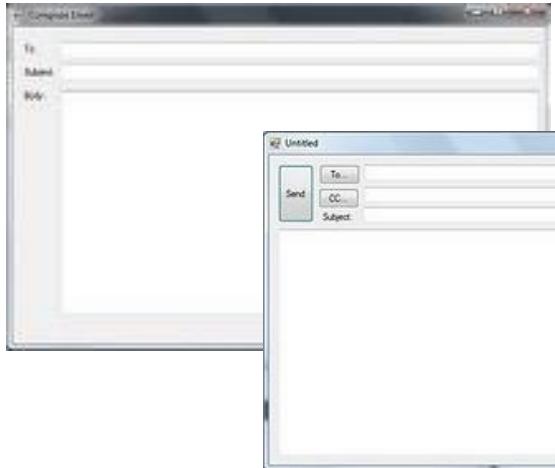
Iterative

Activity A	Activity B	Activity C	Activity D	Activity E	Activity F
Iteration 1				Iteration 2	
		Iteration 3			

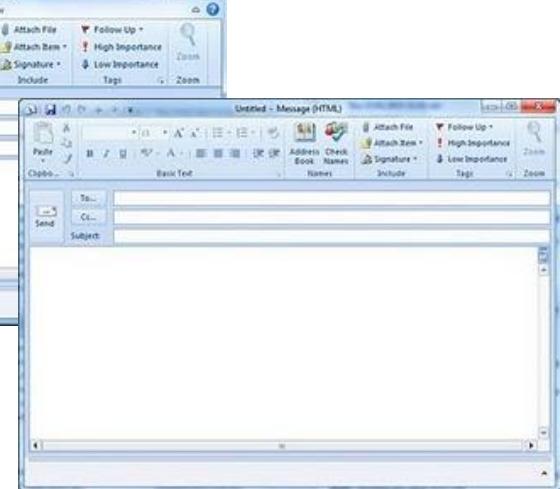
Incremental

Activity A	Activity B	Activity C	Activity D	Activity E	Activity F
Iteration 1					
	Iteration 3				
Iteration 2					

Patterns we've used



**Objective vs.
Subjective Quality**

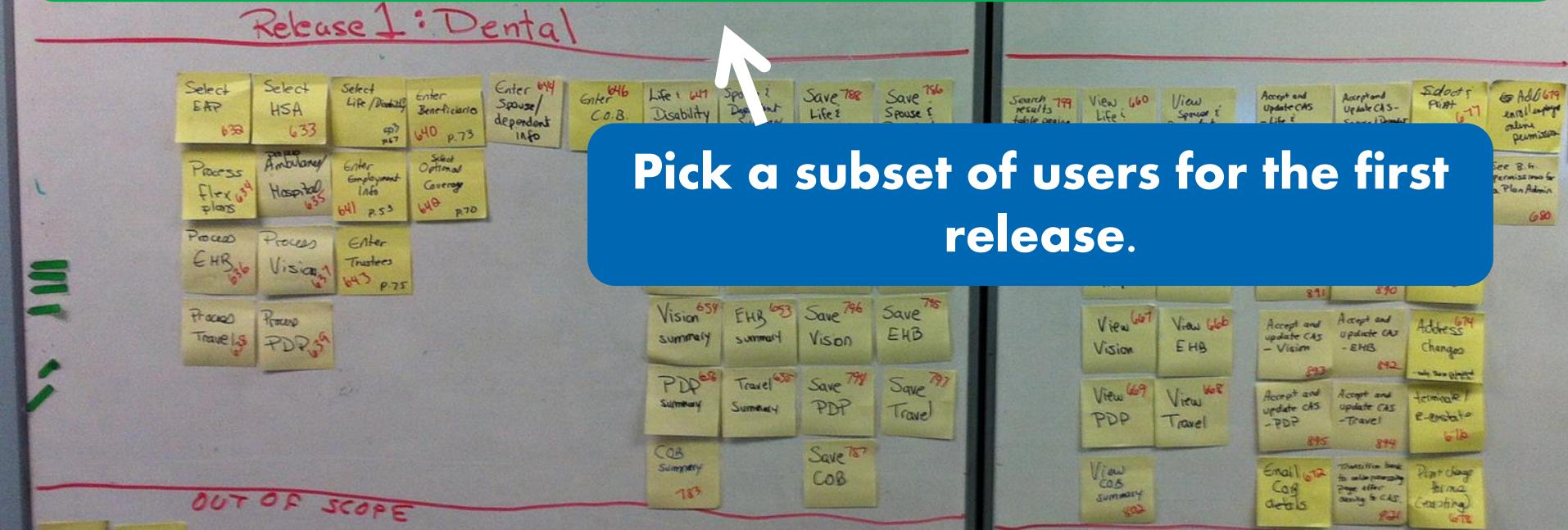


Patterns we've used

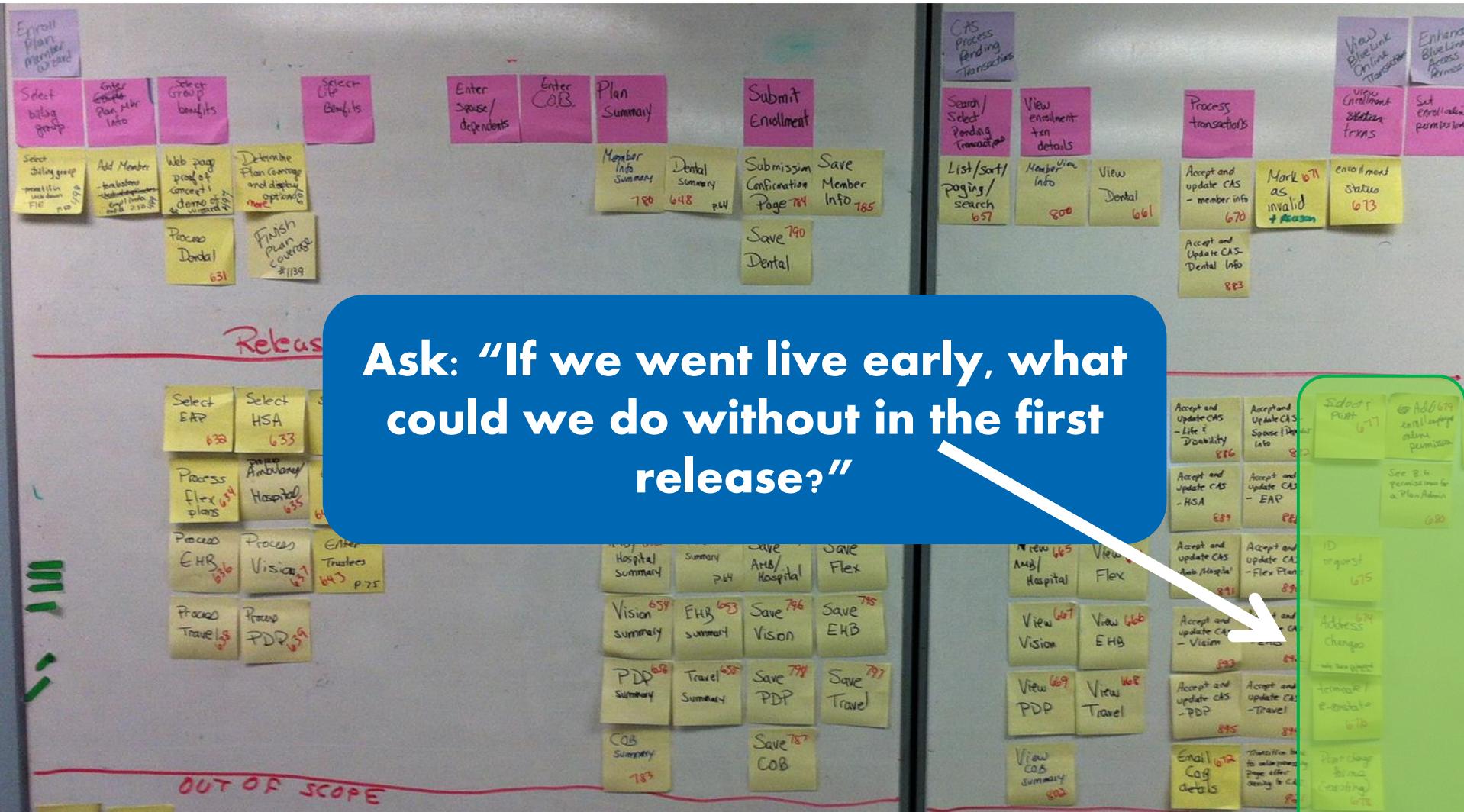


Release 1: Dental

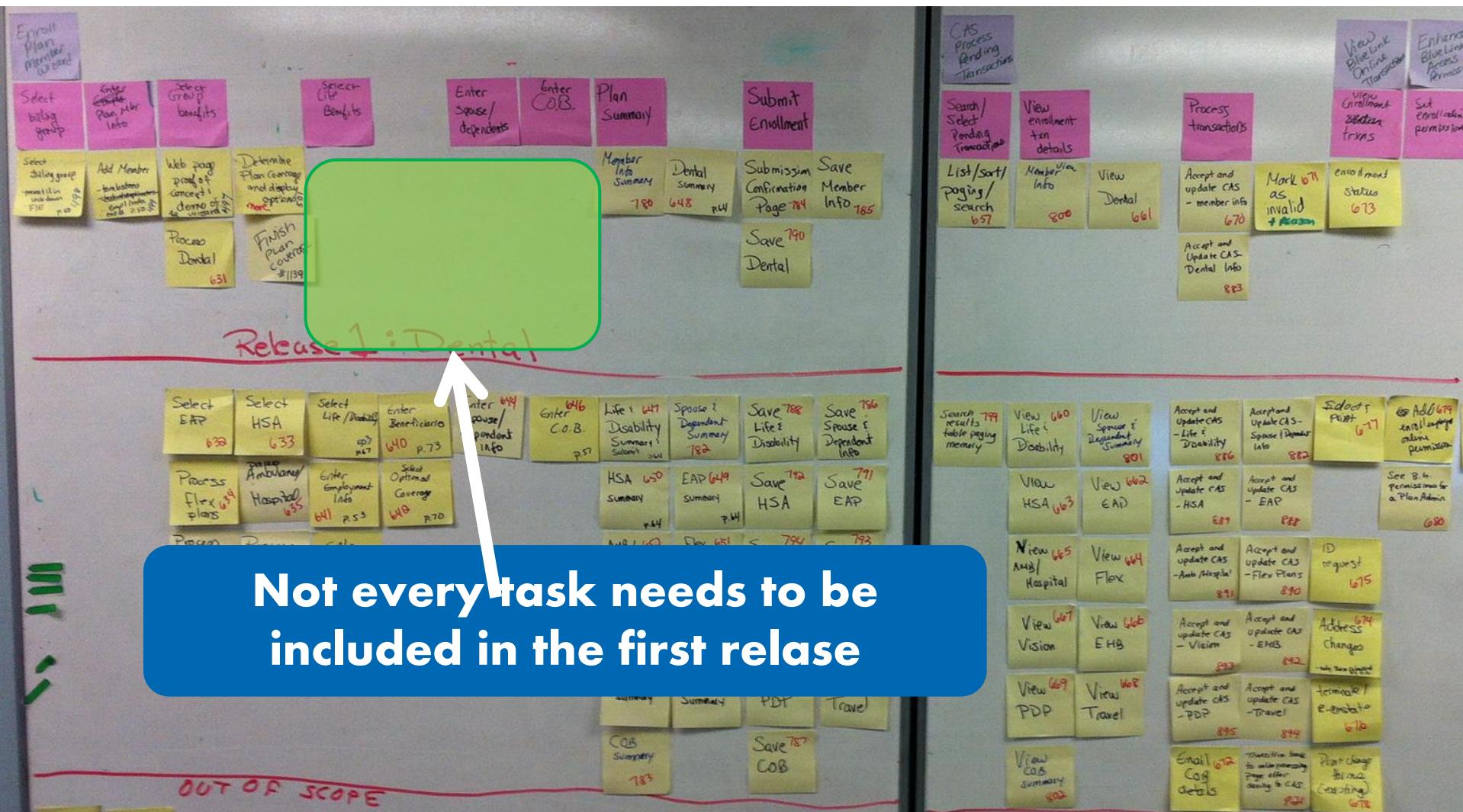
Pick a subset of users for the first release.



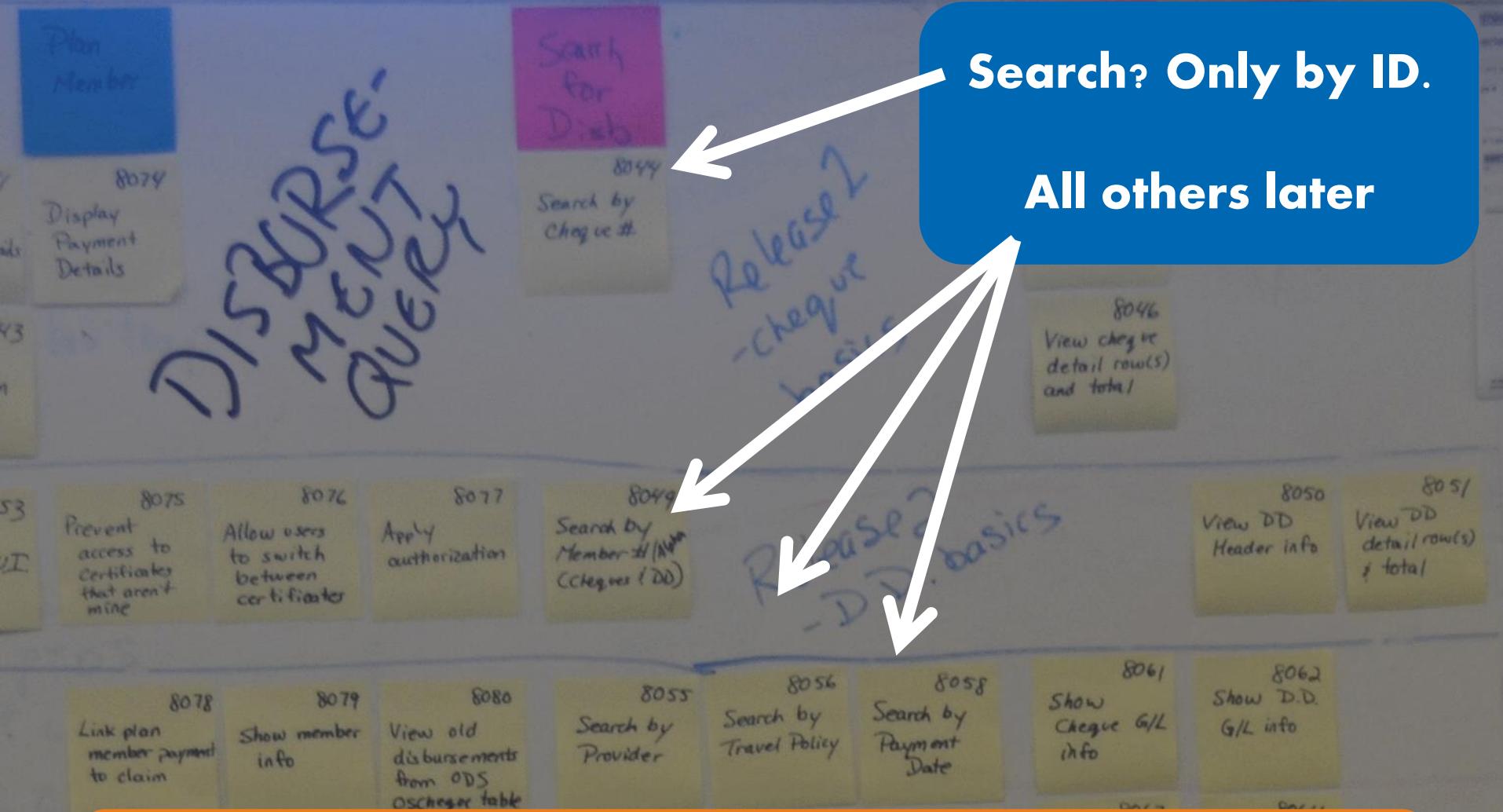
Patterns we've used



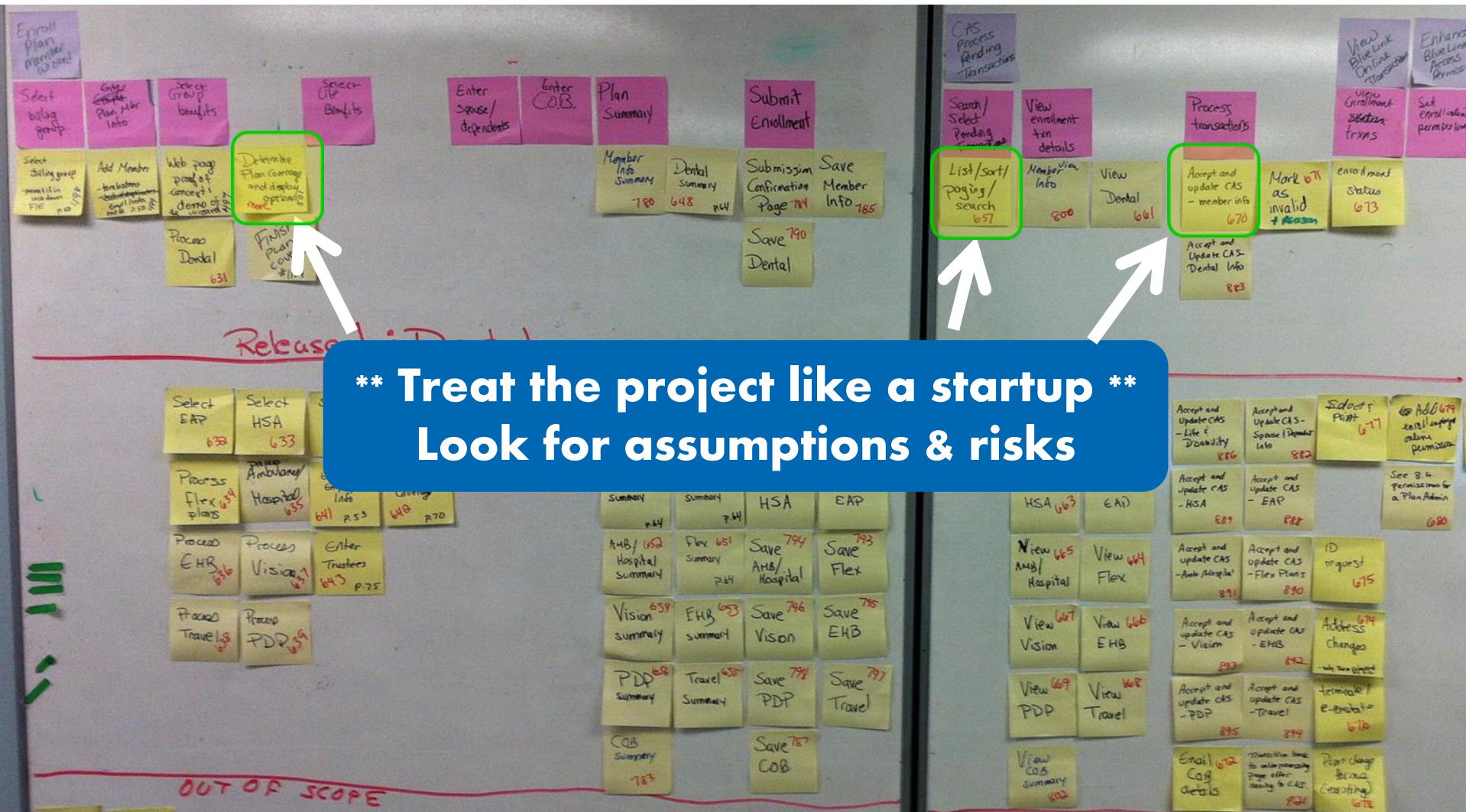
Patterns we've used



Patterns we've used

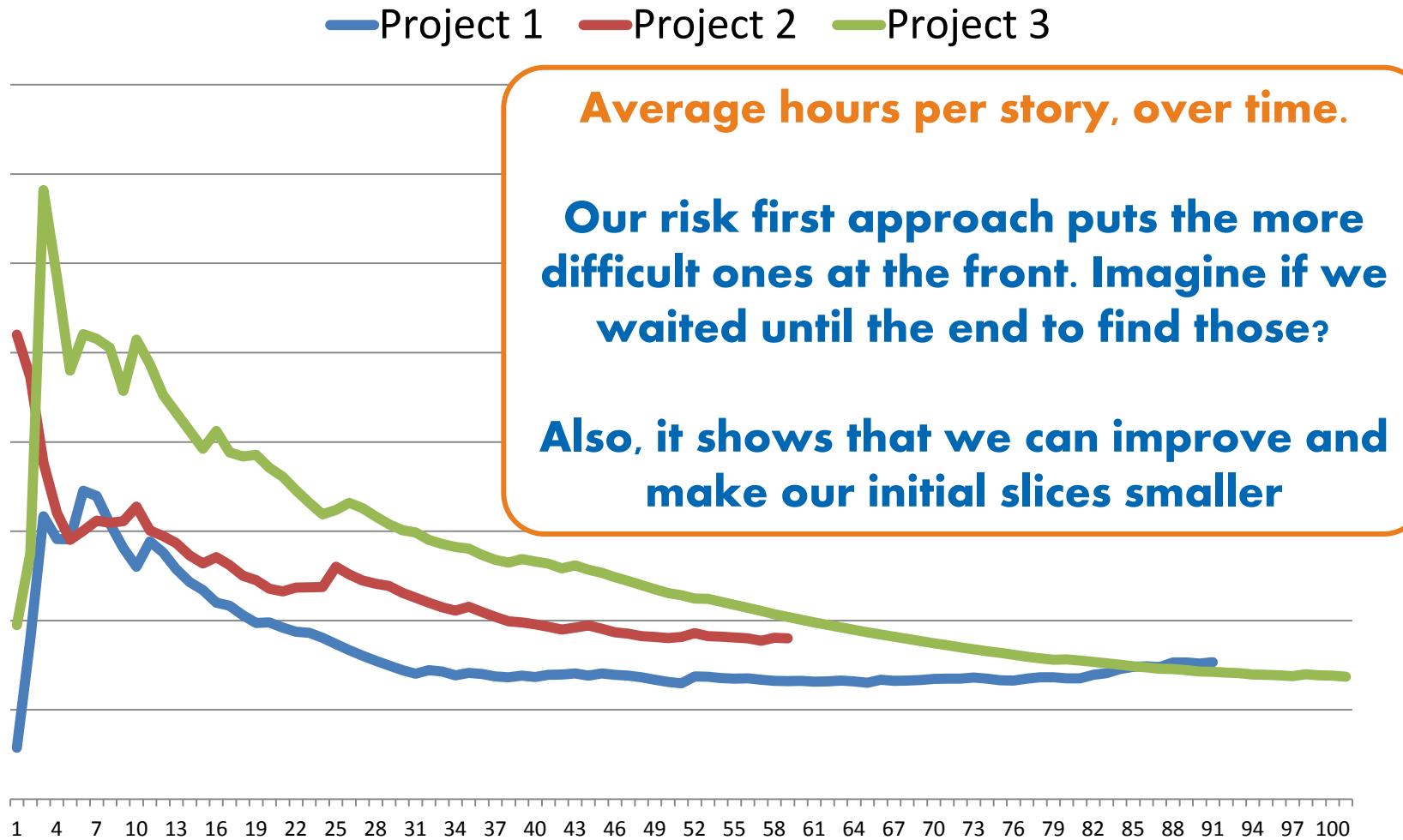


Patterns we've used



Patterns we've used

#10 Interesting Stats



Milk

eggs

cheese - nacho

juice boxes

ice cream

coffee

cream

**Back to your app.
Let's practice that first slice.**

rice crackers

crx

ground beef.

apple sauce



What to build first?

- **What are the risks/assumptions for this project?**
- **What are things we can do without?**
- **What subset of users might we focus on?**
- **Etc...**

What small stories would you need to build a horizontal slice of the whole app in 1-2 iterations?

**** Write your top 5 ****



In Closing

User Story Maps can help you:

- **Make better decisions**
- **Visualize progress**
- **Influence iterative development**
- ... **Increase your ability to deliver**

Steve Rogalsky



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Steve.Rogalsky@protegra.com

**Thanks!
Questions?**

Links

My blog: User Story Map series:

- How to create: <http://winnipegagilist.blogspot.ca/2012/03/how-to-create-user-story-map.html>
- How to prioritize: <http://winnipegagilist.blogspot.com/2013/02/how-to-prioritize-user-story-map.html>
- Tips for facilitation: <http://winnipegagilist.blogspot.com/2012/12/tips-for-facilitating-user-story.html>

Jeff Patton articles:

- http://www.agileproductdesign.com/blog/the_new_backlog.html
- http://www.agileproductdesign.com/writing/how_you_slice_it.pdf



DotNetRocks podcast:

- Show #750: <http://www.dotnetrocks.com/default.aspx?showNum=750>

This presentation:

- <http://www.slideshare.net/SteveRogalsky/user-story-mapping-in-practice>