FUTUREPROOFING THE COMMUNITY SERVICE WORKFORCE

# User Story Mapping Activity

## Building Data Management Capacity

CANADIAN CENTRE FOR NONPROFIT DIGITAL RESILIENCE

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# About the User Story Map

A high-level overview of a User Story Map and its uses

# What is a User Story Map and why create it?

### What is a User Story Map?

A User Story Map is a visual tool that documents each step of a process by centering user actions. The output provides a detailed understanding of the process, including who is involved, what data is collected at each step, and how these components interact with one another. For example, a User Story Map can be used to illustrate the process a team/staff takes during client intake.

### Why create a User Story Map?

Mapping out a process is a valuable tool to build a shared understanding across staff and departments on the following:

- The roles and actions of those involved in the process
- Each step of a process, including challenges, redundancies, and streamlining opportunities
- How data is collected, used and flows through the organization

Assessing these elements supports better data management and decision-making by simplifying data collection processes, reducing redundancies and ensuring safer handling of data.

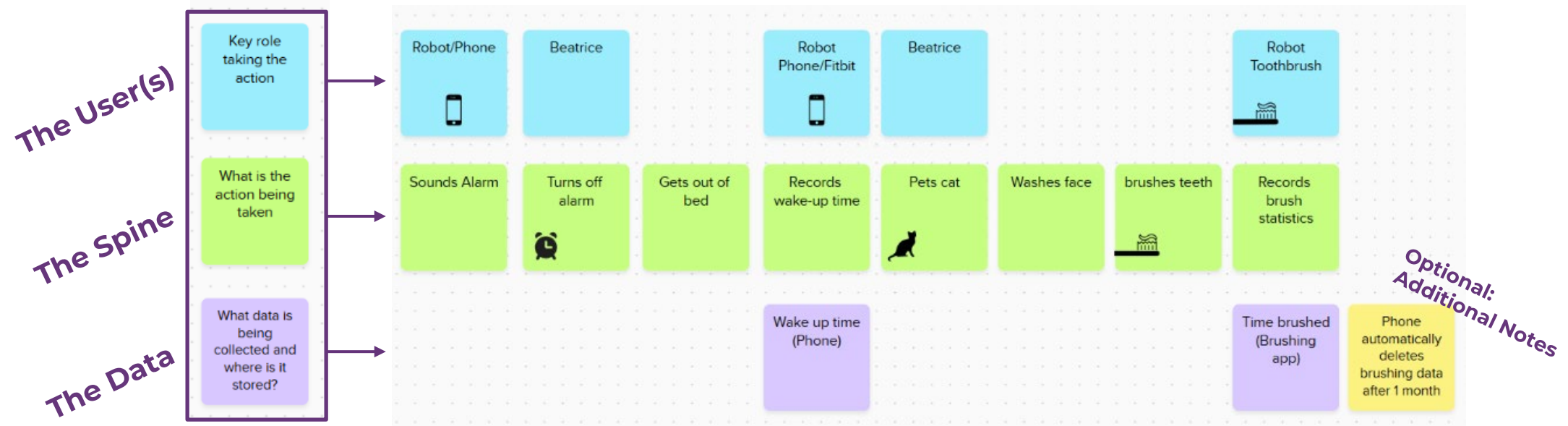
# Anatomy of a User Story Map (1/2)

## Key Components

A User Story Map includes three distinct but related components for each process that is being mapped:

- **The User(s):** Who/What is carrying out these actions?
- **The Spine:** What are the specific steps or actions included in the process?
- **The Data:** What data is being collected along the way and where is it stored?

Below is a simple User Story Map of Beatrice's morning routine. For an organizational example, here is a mural.co template (select enter as a visitor) or a powerpoint template.



# Anatomy of a User Story Map (2/2)

## Optional Components

User Story Maps are easily adaptable, especially for a complex, long-term process or processes with multiple distinct activities. The following additions can enhance clarity and depth:

- **Chapter Headings:** divide the process into multiple clear stages or "chapters" and include a chapter heading for each e.g., "participant intake", "send newsletter", etc to show progression.
- **Additional Notes/Details:** include relevant ideas, open questions or contextual details that add nuance but don't directly fit into the key components e.g., this part of the process happens through a third party, this requires a bulk upload of data, etc.
- **Skills Required (Sub-activity 3.1):** includes relevant digital skills or knowledge that is required for a role to do that step in the process. More instructions are provided in Sub-activity 3.1: Articulate required skills for each role

For an organizational example, here is a mural.co template (select enter as a visitor) or a powerpoint template.

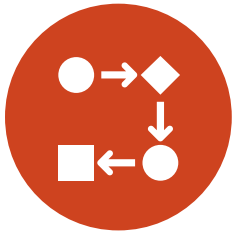
# Prepare for your User Story Map activity

Key elements to identify prior to starting your User Story Map

- Identify which process to map
- Identify which staff to involve
- Identify how staff will collaborate

# Prepare for your User Story Map

Before starting you User Story Map, it is crucial to identify these elements as they can help you appropriately resource and onboard the appropriate staff. The following slides provide some direction and tips on identifying these elements.



**1. Which process to map**
Start by identifying the process you want to map. It will guide which staff to involve and how they will collaborate.



**2. Which staff to involve**
Based on the selected process, identify which staff will lead the activity and who will participate to ensure adequate staff availability.



**3. How staff will collaborate**
Based on the staff and the selected process, identify how the team will collaborate and which tools they will use.



**The expected time commitment for the User Story Mapping Activity is:**
2 to 4 hours depending on the complexity of the chosen process

# 1. Identify which process to map

**Prepare for your User Story Map activity (1/3)**

User Story Maps can serve multiple purposes across several organizational processes. They help to gain additional clarity on complex workflows, articulate detailed steps that support training, identify areas of process improvement, and define technology requirements.

For this User Story Map, select a process that you are curious about that involves a few staff roles, requires data collection, and is familiar process to many staff within your organization. Common examples of such processes are:

- Participant intake
- Program activities from start to completion
- Gathering data and drafting an annual report

**Tip**

Increasing the size, complexity and number of staff implicated in the process will increase the time needed to map it. These types of process are great to tackle when clarity and alignment are desired. Though it may be best to start will a well-known, simple process or modify an existing user story map to keep the task manageable. User story maps are often used to map future desired processes as well

# 2. Identify which staff to involve

**Prepare for your User Story Map activity (2/3)**

Once the process is chosen, identify the key staff needed to ensure adequate resourcing. Based on the staff involved, their capacity and their working styles, there are two key approaches to tackle this work:

| | Individual led approach | Collaborative led approach |
|---|---|---|
| **What is the approach?** | ➢ Assign one lead staff that is familiar with the selected process to draft the User Story Map.<br>➢ Circulate the draft the other key roles involved in the process to validate its accuracy. | ➢ Host a meeting with the key roles involved in the selected process to collaboratively create the User Story Map in a 1.5 to 3 hour meeting. |
| | **Note:** If multiple staff share same role, i.e. several Team Leads have an intake process within each program, validate or involve 1 to 2 staff from each role to ensure consistency in how the overall intake process is carried out. | |
| **When to choose which approach?** | This approach minimizes initial staff resourcing, making it useful if time is limited. It is effective for processes where the lead is frequently involved in the process. | This approach fosters collaboration and clarifies expectations throughout the process. It requires more resourcing and more coordination to meet. |

# 3. Identify how staff will collaborate

**Prepare for your User Story Map activity (3/3)**

The last step is to determine which format the staff will collaborate in. A User Story Map exercise is flexible and can be drafted **in person** using a wall and sticky notes or on an **online** whiteboarding app. Whiteboarding apps include mural.co, draw.io, miro.com, lucidchart.com, or powerpoint all of which have freemium options. We have created two templates in mural.co (select enter as a visitor) and in powerpoint.

**Tip**

Regardless of which format you choose, it is more important to complete the exercise collaboratively with relevant users involved in the process. This collaborative approach allows for users to align on how they are doing things, validate the process in real time and ensure consistency across roles.

# Create your User Story Map

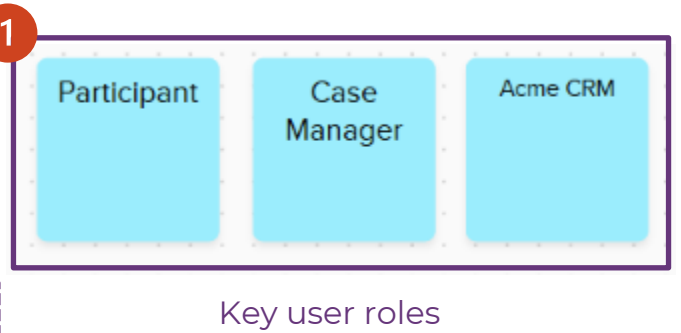
A step-by-step process on how to create a User Story Map

# Create your User Story Map

**Step-by-step process (1/2)**

To follow along, a full template is created in mural.co or in powerpoint.

1. **List all users involved** throughout the process. This includes staff, the client(s)/potential client(s), and any systems or technology, e.g. CRM, Excel sheets that are used to automate actions.



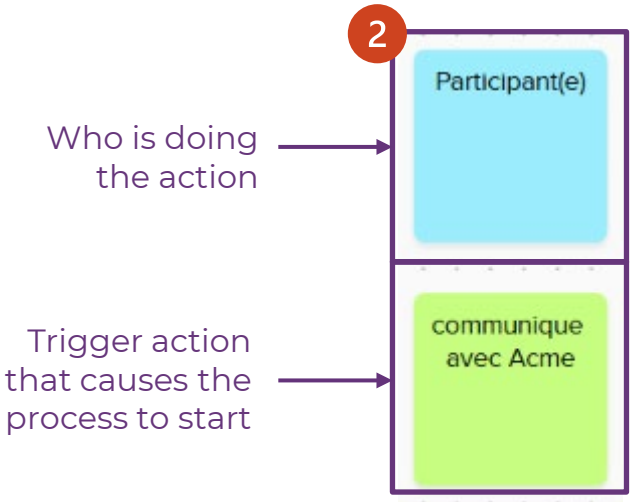

Key user roles

**Tip**

When identifying users, use roles or titles instead of staff names. This will help you better understand role responsibilities and identify skills needed in each position.

2. **Define the starting point** of the User Story Map, by recording the "trigger" action or the action that causes the process to start.

   Example: Participant reaches out to our organization, Acme org

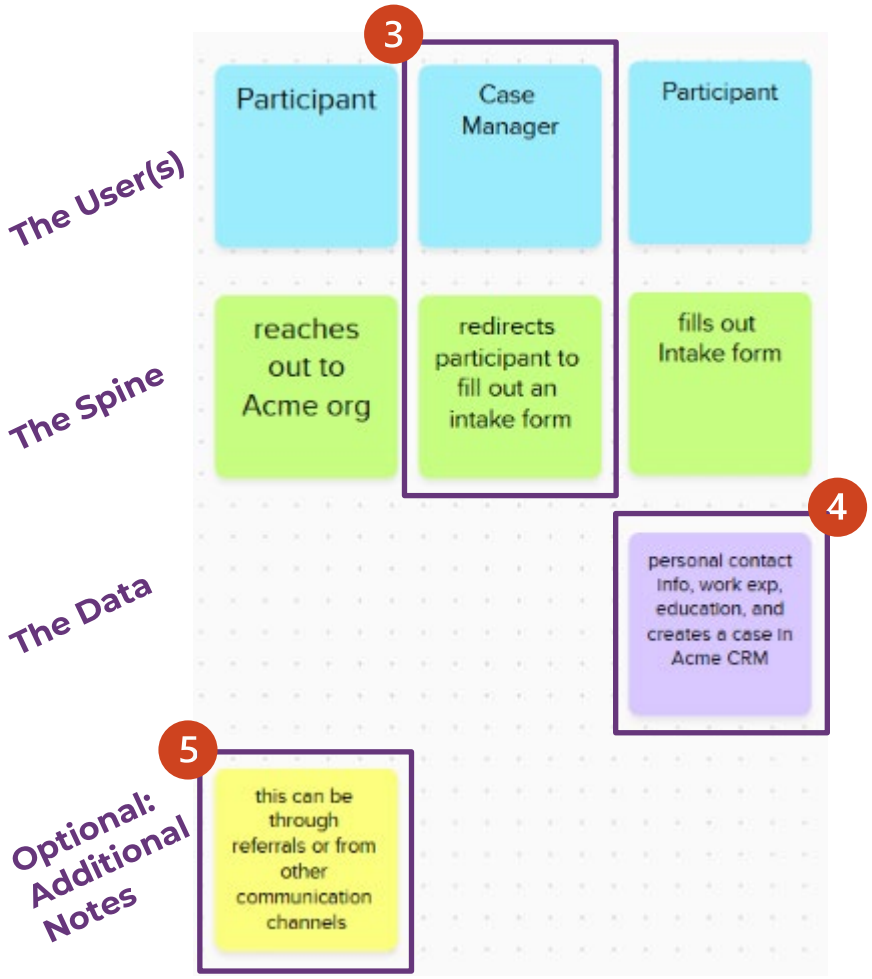


# Create your User Story Map

**Step-by-step process (2/2)**

3. **Continue listing the next steps in the process** by recording each small step on its own sticky note in the "Spine" row. Above each step, identify which user is carrying out the action.
4. **Include the key data collected** e.g. contact info, demographics, below the spine if data is being collected or specific forms are being filled out, along with where the data is stored.
5. **Include any additional relevant notes** (e.g., if a process is automated), at the bottom of the User Story Map below the relevant action. Each action can have multiple notes with details displayed as a column under the action.
6. **Continue recording users, actions and details** until you have reached the end of the process.

Once the User Story Map is complete, use it to inform the synthesis activities that explore questions on your process, data and skills needs.




**Example of the beginning of a User Story Map of a Client Intake Pathway**