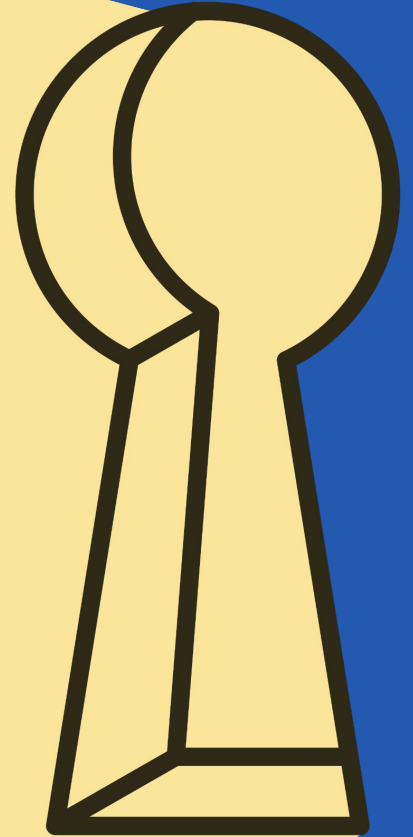


UNLOCKING BETTER TECH COLLABORATIONS THROUGH USER STORIES

Presented by Simone Carvalho & Justin Birdsong
Nonprofit Technology Conference - March 2024
Collaborative Notes: <https://nten.link/3SHFqNV>

Skeleton Key
STRATEGIES





Skeleton Key

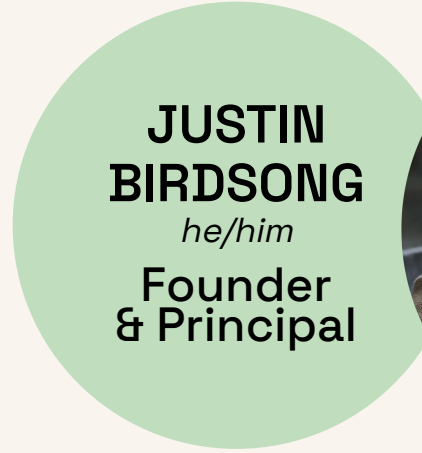
STRATEGIES

We are a strategy consulting firm that helps nonprofit Fundraising, Marketing, & Data experts to own and operationalize their technology and data for maximum impact.

SkeletonKeyStrategies.com



**SIMONE
CARVALHO**
she/her
Principal
Consultant



**JUSTIN
BIRDSONG**
he/him
Founder
& Principal

Selected
Clients



AGENDA

- Review Workshop Goals
- The Value Proposition
- User Stories 101
- Practical Tips
- Hands-on Exercise

[Access the Slides & Collaborative Notes Here](https://nten.link/3SHFqNV)

<https://nten.link/3SHFqNV>



WORKSHOP GOALS

After this session, attendees will be able to:

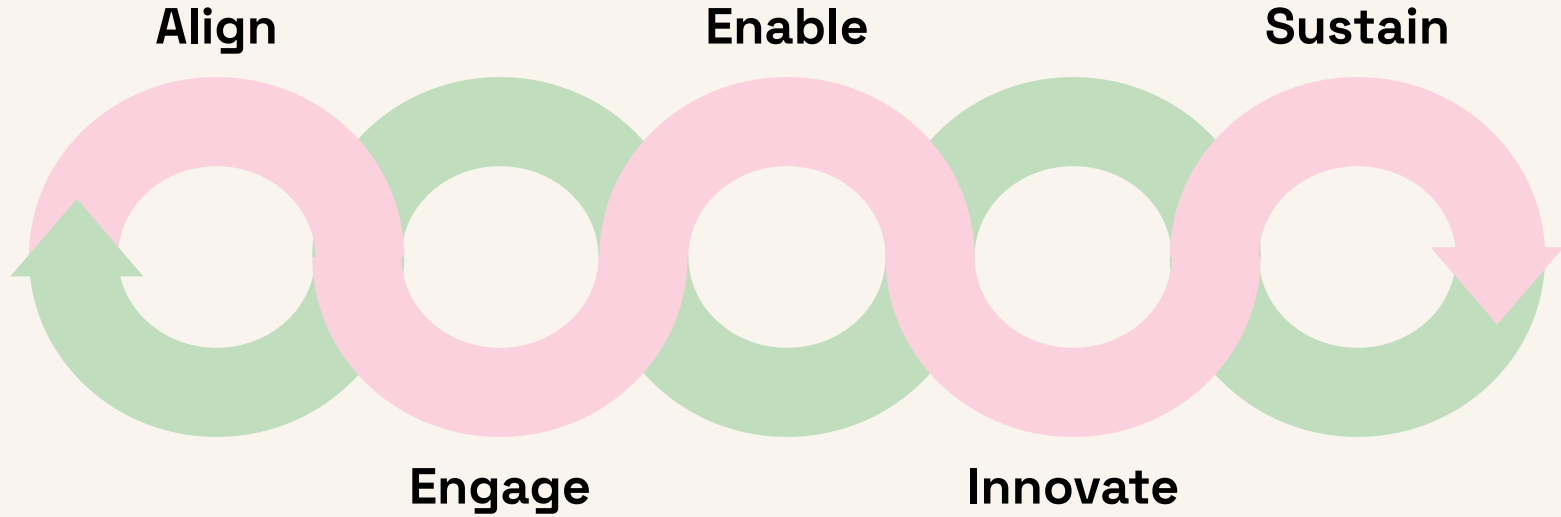
- Understand the value of user stories as a tool for better communication
- Define the 4 elements of a user story
- Apply and utilize the user story template
- Recognize scenarios where user stories can help improve collaboration between business and technical teams



PROJECT SUCCESS =

COMMUNICATION + COLLABORATION

HARMONIOUS COMMS & COLLABORATION





**What do you
find
challenging?**

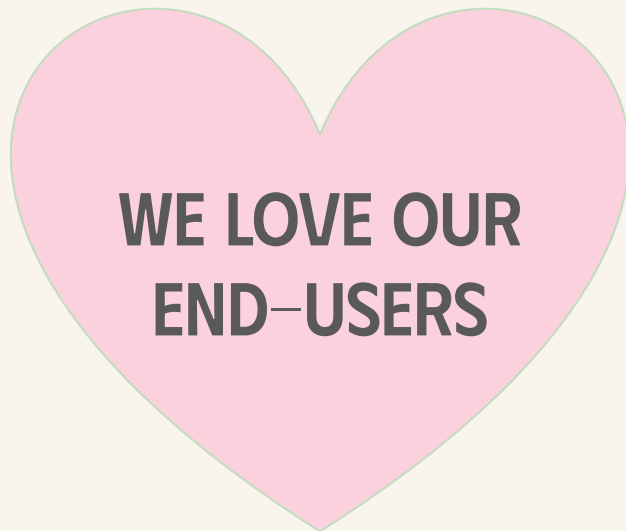


USER STORIES

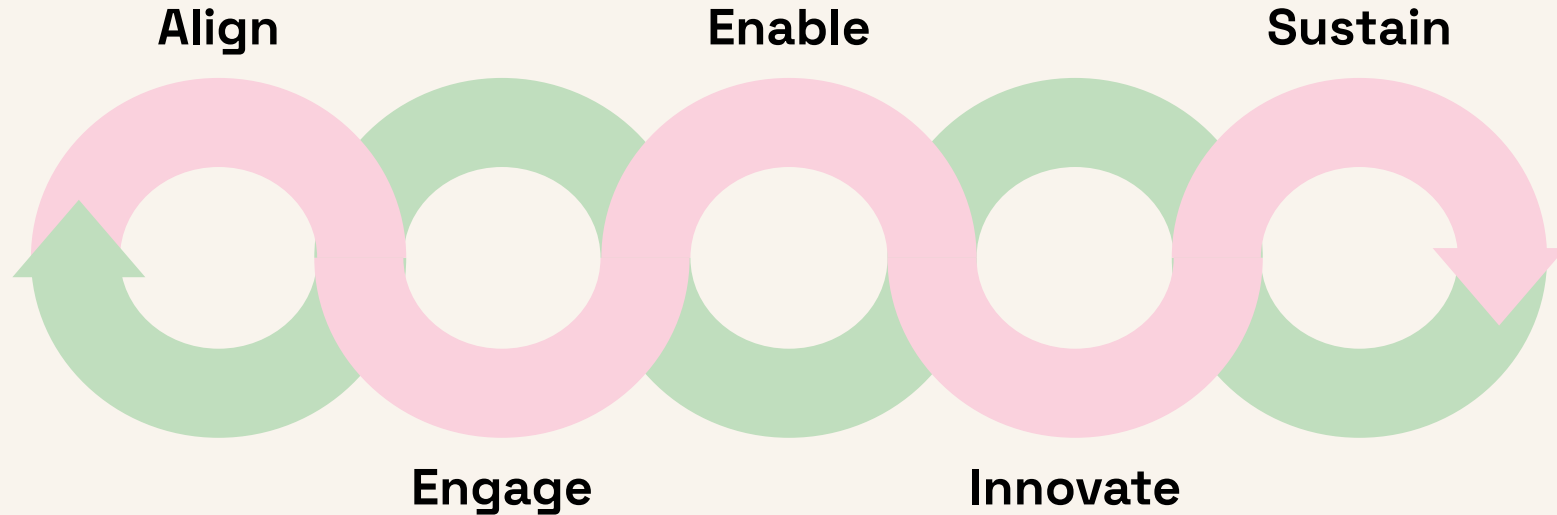


WHAT IS A USER STORY

A short, plain-language description of a software feature written from the end user's perspective.



HARMONIOUS COMMS & COLLABORATION WITH USER STORIES

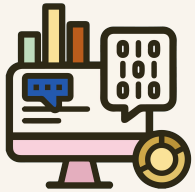


WHAT IS NOT A USER STORY

USER STORIES \neq SYSTEM SPECS OR REQUIREMENTS



WHEN TO UTILIZE USER STORIES



Agile Projects

Migrating systems

Building integrations

Feature development



Process Docs

Current state analysis

Future state visioning

Training and SOPs



Product Eval

RFP materials

Differentiate requirements from traditions

Clarify expectations & outcomes



IT Support

Provides business context for issues

Optimize cross-team processes

User Stories 101



ANATOMY OF A USER STORY

“As a <user archetype>,

The Who

I want to <take an action>,

The What

so that <business reasons are fulfilled>”

The Why

Acceptance Criteria: <Outline outcomes>

The When

WHAT IS A “GOOD” USER STORY?

When you can answer:

- 1) Who is the user that will benefit?
- 2) What needs to happen from the user’s perspective?
- 3) Why is it important (the problem we are solving)?
- 4) When will the user achieve the desired outcome?

ANATOMY OF A USER STORY

As a Fundraising User,

The Who

I want to track a donor's custom recognition name,

The What

so that I can acknowledge them appropriately in the Annual Report

The Why

Acceptance Criteria 1: I can capture a custom donor recognition name

Acceptance Criteria 2: I can edit or delete a custom donor recognition name

The When

ANATOMY OF A USER STORY – THE WHO

- **WHO** is the user benefitting from the value?
- The shared attributes below are used to group your key users into abstract representatives, or ARCHETYPES:
 - Responsibilities
 - Goals and motivators
 - Challenges
 - Tools and systems
- Archetypes are *not* personas or job titles
 - Avoid using names, human photos, and demographic characteristics such as age, country, income or personality traits which could reinforce implicit biases



ARCHETYPE: FUNDRAISING USER

Responsibilities	Goals	Challenges	Tools
<ul style="list-style-type: none">● Cultivate donor relationships● Solicit gifts over \$1k● Track progress towards fundraising goals● Report monthly activities and dollars raised to senior leaders	<ul style="list-style-type: none">● Achieve annual \$ goals set by board● Support programs and mission delivery to clients● Cultivate relationships with donors and board● Steward active donors	<ul style="list-style-type: none">● Keeping donors engaged● Maintaining accurate gift info● Capturing interactions● Tracking due dates	<ul style="list-style-type: none">● Excel● CRM● iWave● Email● Text● Slack● Mobile Apps

ANATOMY OF A USER STORY – THE WHAT

- **WHAT** needs to happen from the user's perspective?

- Describe the action's intent or goal to be accomplished:

“As a Fundraising User, I want to assign a Primary Relationship Manager to a donor...”

- NOT the technical specifications, interface, or elements of the feature:

“As a system user, I want to click ‘Search’, enter in a partial name to find and select the operating user or other active users to populate as record owner...”

ANATOMY OF A USER STORY – THE WHY

- **WHY** is it important (the problem we are solving)?
- Don't skip out on this part! It can totally change the interpretation of a story and alter solution design

v1: "As a Fundraising User, I want to assign a Primary Relationship Manager to a donor, so that it is clear to all other staff which officer is currently cultivating and soliciting that donor."

vs.

v2: "As a Fundraising User, I want to assign a Primary Relationship Manager to a donor, so that I can easily access and report on my assigned portfolio."

ANATOMY OF A USER STORY – ACCEPTANCE CRITERIA

- **WHEN** will the user achieve the story's desired outcome?
- Independently verifiable binary statements (true/false) which describe what the end result should be, *not* the design or steps to achieve it (tests cases can be derived from AC but not the other way around)

“As a Fundraising User, I want to assign a Primary Relationship Manager (PRM) to a donor, so that it is clear to all staff which officer is currently cultivating and soliciting that donor.”

Acceptance Criteria 1: I can assign one (and only one) fundraising officer as PRM

Acceptance Criteria 2: I can capture the PRM assignment status and start date

Acceptance Criteria 3: I can end a PRM assignment and capture the end date

USER STORY TEMPLATE RECAP

“As a <archetype>, I want to <take action>, so that <reason>.”

Who will benefit?

What is the desired action?

Why is it important?

+ Acceptance Criteria

When is it achieved?

REVIEW & REFINE

As a Major Gifts Director, I want to indicate whether an account can be mailed, so that I can omit records with this checkbox from lists.

As a fundraising user, I want to indicate whether an account can be mailed, so that I can omit donors as requested from mailing lists.

REVIEW & REFINE

As a Portfolio Manager, I want to track the required grant submission materials and deadlines.

As Portfolio Manager, I want to track the required grant submission materials and deadlines, so that I can submit my completed proposal on time.

REVIEW & REFINE

As a Portfolio Manager, I want to track the grant submission deadline, so that I can submit my completed proposal on time.

Acceptance Criteria 1: I can select a date from a miniature calendar to set a deadline.

Acceptance Criteria 2: The bell notification icon lights up to remind me of a deadline.

Acceptance Criteria 1: I can capture the grant submission deadline.

Acceptance Criteria 2: I am notified a week in advance of the deadline.

REVIEW & REFINE

Tiffany wants to monitor the open and click through rates of her email campaign so that she can report on the success of her marketing efforts to her supervisor.

As a Marketer, I want to track the real-time open and click through rates of my email campaign, so that I can report on the success of our marketing efforts.

PRACTICAL TIPS

- **DO:**

- Ask WHO, WHAT, WHY and WHEN
- Collaborate with stakeholders
- Keep it simple and objective
- Focus on the user value

- **DON'T:**

- Be afraid to challenge traditions
- Leave it vague or ambiguous
- Be too complex (with multiple users or reasons in one story)
- Lock in a solution or technical details

HANDS-ON EXERCISE

- In teams of 2 or more, you will conduct a user story discovery session with your peers for the next 10 minutes.
- **You are a Business Analyst working with a nonprofit to collect their user stories for a new intranet that will centralize all org-wide documentation like training materials and employee guides; provide a staff directory; and foster remote collaboration.**
 - Start with introductions
 - Define your archetype(s)
 - Draft 2 user stories
 - Review and refine
 - Read out

Copy template at
<https://tinyurl.com/userstories24ntc>
(requires Google login)



READOUT / Q & A

THANK YOU!

Please fill out the [session survey](#), we appreciate your feedback!

See us again at NTC:

- **Thurs 3/14 at 2:15pm** - “Live, Laugh, Love Through Your Sustainer Migration”
- **Fri 3/15 at 10:15am** - “Equitable governance and consent-based decision making: An intro to sociocracy”

STAY IN TOUCH



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