CHECKLISTS FOR THE
USER STORY MAPPING
WORKSHOPS

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PRACTICAL MODERATOR'S GUIDE

Artur Gula

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Introduction

This handbook will save your time.

I designed it for the User Story Mapping practitioners who organize workshops from time to time.

I experienced that lifecycle personally:
- There are many USM sessions in one period.
- Then development starts, so there is no need for the USM any longer.
- After months, I have to remind everything to myself before the next session.

So I created a **set of checklists that supports me in running the USM workshop without a longer preparation**. Instead of going through the books and videos to remind the details about the technique, I just read a set of practical notes.

Now I am sharing those notes with you.

You will find **twelve checklists** plus **one email template** here. Additionally, I attached a **simplified version** of some of the checklists. Those you may take to the workshops either in digital or printed form.

Please be aware that this handbook is NOT the manual about the User Story Mapping technique. I assume that you know something about the USM. If not, then I recommend starting with Jeff Patton's book 'User Story Mapping.' It explains everything in detail.
Then go back to this handbook as a summary.

Good luck!

Steps during the User Story Mapping process

Each User Story Mapping workshop consists of the following steps:

1. Preparation (before the workshops).
2. Telling the story (when starting the workshops).
3. Creating a frame of the story (framing).
4. Building the main path (user journey).
5. Defining actors (personas) and adding them to the path.
6. Adding details below the steps from the main path.
7. Adding all the remaining elements to the map - risks, integrations, actions outside of the system, pain, and happy points.
8. Optionally, adding notes that group the steps from the main path into the logical areas.
9. Defining the Minimum Viable Product (MVP) and other versions.
10. Summarizing the workshops and archiving the results.

Here is the result of the User Story Mapping workshops (example)
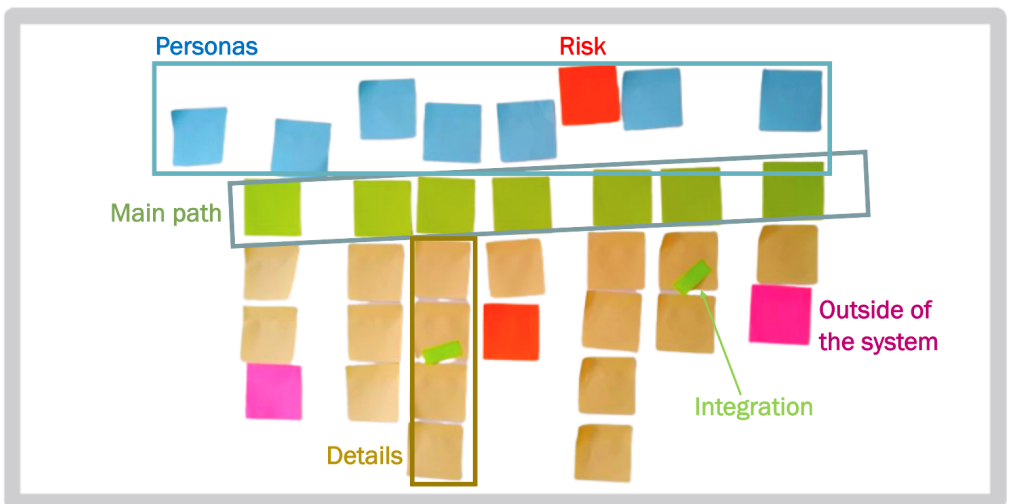
How to prepare yourself for the USM workshop

Before you start the User Story Mapping workshops, I recommend:

1. Read (or watch) information about the company (customer) for which you will run the workshops. Understand their business and position on the market.
2. Review publicly available materials, brochures, etc., which describe the products and services offered by the company.
    a. You should understand the language they use.
    b. You must be familiar with the names of the products and services they offer.
3. Analyze competitors in the market.
    a. What are their strengths and weaknesses compared to the product you will design and build?
    b. What might be the inspiration from their solutions?
4. Find out more about the participants of the workshops.
    a. Invite the right people with proper skills and domain knowledge.
    b. Remember their names and positions. You will know who to ask for what information.
5. Ask for the materials which will help you prepare for the workshops, for example,
    a. Internal procedures,
    b. Market analysis,
    c. Surveys,
    d. Users profiling,
    e. User's manuals for the existing products,
    f. Reports from the support/customer service departments (common issues etc.)
    and so on.

The more you invest in the preparation before the workshops, the better the User Story Mapping session will be!

HOW TO ORGANIZE A
USER STORY MAPPING WORKSHOP?

User Story Mapping is a worldwide-known technique for building a common understanding of IT products. There are many books and training which help to master this technique.

This handbook takes all that knowledge and summarizes it into practical checklists. It covers all the steps of the User Story Mapping process.

It is condensed and easy to apply. Take it with you to the workshops, and you will not forget about anything!

ABOUT THE AUTHOR

Artur Gula - I am passionate about delivering high-quality software that responds to customers' and users' needs.
I am the IT Business Analyst and Project Manager.
I implemented the User Story Mapping technique into the corporate environment in 2017. Since then, I have been enthusiastic about this method.

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