Is It Time to Ditch Your Product Backlog?
Using Story Maps to Visualize Backlogs

Agile 2010 Conference – August 11, 2010
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This is a very hands-on session, and you will be busy throughout.

Please do not put anything on the tables – we will need all the table space for the exercises.

Thanks!
Introductions

- Who’s the guy up front?
  - Paul Hodgetts, Agile Coach with Agile Logic & BigVisible

- Who are those folks you’re sitting with?
  - Introduce yourself!

- What are we doing today?

A Little Background...
Which Is Clearer – 1 or 2?

Backlog Lists are One Dimensional

<table>
<thead>
<tr>
<th>Product Area</th>
<th>Description</th>
<th>Priority</th>
<th>Initial Estimate</th>
<th>Planned Estimate</th>
<th>Target Sprint</th>
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<tbody>
<tr>
<td>Catalog</td>
<td>Customer can browse catalog categories with basic navigation.</td>
<td>H</td>
<td>3.0</td>
<td>1</td>
<td></td>
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<td>Catalog</td>
<td>Customer can select a category and browse products with basic navigation.</td>
<td>H</td>
<td>3.0</td>
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<td>Catalog</td>
<td>Sales can add products with category and basic information.</td>
<td>H</td>
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<td>Profile</td>
<td>Customer can create a new profile with basic information.</td>
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<td>Login</td>
<td>Customer with profile can log into the site.</td>
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<td>Shopping Cart</td>
<td>Customer can add a product to their shopping cart.</td>
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<td>Shopping Cart</td>
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<td>M</td>
<td>3.0</td>
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<td>Catalog</td>
<td>Customer sees special offers based on previous shopping history.</td>
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<td>Customer Support</td>
<td>Support Rep can view customer’s current order and get shipment status.</td>
<td>L</td>
<td>10.0</td>
<td></td>
<td></td>
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</tbody>
</table>
Backlogs Are Multi-Dimensional

Story Maps

- A visualization tool for product backlogs
- A map of our travels through our project
- A diagram of various aspects of interest
- Richer, more multi-dimensional than a list
- An excellent collaboration tool
  - Associated with the activity of generating the stories and backlog - “Story Mapping”
- Named & popularized by Jeff Patton ~2005
  - See www.agileproductdesign.com
Preparing a Story Map

- Same kind of activities as preparing a backlog:
  - Identify target stakeholders (e.g. users)
  - Identify their value propositions
  - Identify product elements that can fill those
  - Map user goals and task flows
  - Identify significant interests and risks
    - Architectural, Ux, data, integrations, etc.
  - Generate initial story set
  - Identify initial milestones

Dimensions of a Story Map
Story Map Dimensions

- **Story Information**
  - Target user, title, ID, size, owner, etc.

- **Story Hierarchy**
  - Features / epics to child stories

- **Story Status**
  - Not started, completed, cancelled, etc.

- **Story Type**
  - New feature, enhancement, bug fix, etc.

Story Map Dimensions

- **Story Value Proposition**
  - Value rating

- **Story Priority**
  - Priority rating, rank ordering

- **Target Milestone / Release**
  - Incremental build out plan
Story Map Dimensions

- **Functional Area**
- **User Task Flow & Steps**
- **Risk & Significance**
  - Architectural, UI, Data Model, etc.
- **Dependencies**
  - Iterative refinement

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Story Map Dimensions

- **Story’s work flow**
  - Activities required
- **Resourcing**
  - Need for specialists
  - Coordination with external teams
- **Service level expectations**
Visualization Techniques

Tourist can view the home page when accessing the primary url.

Text Labels
Text Size
Text Color / Highlight
Post-It Size
Post-It Color
Visualization Techniques

Relative Positioning
Horizontal / Vertical / Regions

Sectioning
Columns / Rows / Areas / Boards

Path Positioning
On Lines, Curves, Shapes

Composition
Layered, Post-Its on Post-Its

Connectors

Visualization Techniques

Marks
Check Marks, Crossed Out, etc.

Symbols
Colored Dots, Stickers, Push Pins

Temporary Tags
Flags, Tabs, Smaller Post-Its

Meeting Needed!
Exercise 1: Building a Basic Map

1. Look at your list-format product backlog
2. Decide what dimension you will use Post-It color to represent
3. Attach all the corresponding story cards to the Post-Its
4. Think a little about the overall arrangement
5. Do a first-pass arrangement of the Post-Its onto the large flip chart sheet(s)
Exercise 2: Organizing Scope

Exercise 2

1. Decide what you will use the horizontal axis for
   - What story dimensions help organize best?
   - Are there major columns or regions?
   - Try adding the user task flow from handout
2. Leave the vertical dimension available for now
Exercise 3: Build-Out & Milestones

Exercise 3

1. Using the “milestone” column in the backlog, arrange the stories in a build-out order
2. Decide how you will indicate the milestones
3. Within each milestone, how will you show the incremental build out of each feature/section?
4. Bonus: What “release planning” information can you get from the map at this point?
Exercise 4: Richer Communications

1. Decide how you will show the significant stories (marked in the “significance” column of the backlog)
2. Decide how you will show the stories with external dependencies (the “external” column)
3. Decide if you want to show epic/child relationships, and if so, how?
4. Bonus: You have been assigned the lead on all the promotions stories – how will you show you are the go-to person for those?
Examples
Examples

Examples
Examples

Examples
Examples

Examples
Examples

Questions?
Thank You For Attending!

Enjoy the rest of the Conference!

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Materials will be posted at www.agilelogic.com

Enterprise coaching from BigVisible: www.bigvisible.com
<table>
<thead>
<tr>
<th>ID</th>
<th>Role</th>
<th>Capability</th>
<th>Size</th>
<th>Milestone</th>
<th>Feature Area</th>
<th>Significance</th>
<th>External</th>
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<td>view the home page when accessing the primary url</td>
<td>2</td>
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<td>view, search, sort and filter wish list activities</td>
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<td>Arch, Ux</td>
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<td>view a proposed itinerary schedule</td>
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<td>view proposed itinerary conflicts</td>
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<td>resolve a proposed itinerary conflict</td>
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<td>book a proposed itinerary</td>
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<td>review &amp; confirm proposed itinerary</td>
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<td>Booking</td>
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<td>35.2</td>
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<td>automatically cross-book partner services for an itinerary</td>
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<td>35.3 Tourist</td>
<td>Reserve partner services for an itinerary</td>
<td>5 2 Booking Partner</td>
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<td>Pay for a booking [various payment methods]</td>
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<td>Enter credit card information</td>
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<td>35.4.2 Tourist</td>
<td>Process credit card payment</td>
<td>5 Booking</td>
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<td>Enter check payment information</td>
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<td>35.5 Tourist</td>
<td>Confirm partner services booking for an itinerary</td>
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<td>35.6 Tourist</td>
<td>View booking confirmation</td>
<td>3 1 Booking Ux</td>
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<td>36 Tourist</td>
<td>View my list of bookings</td>
<td>2 2 Booking Ux</td>
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<tr>
<td>37 Tourist</td>
<td>View &amp; print a booking summary</td>
<td>1 1 Booking</td>
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<td>38 Tourist</td>
<td>View &amp; print a booking schedule</td>
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<td>39 Tourist</td>
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<td>40 Tourist</td>
<td>Subscribe to booking reminders</td>
<td>2 5 Booking</td>
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<td>41 Tourist</td>
<td>Subscribe to activity reminders</td>
<td>2 5 Booking</td>
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<td>42 Agent</td>
<td>Search for a tourist</td>
<td>1 2 Tourist Support</td>
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<tr>
<td>43 Agent</td>
<td>View a tourist’s profile</td>
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<td>44 Agent</td>
<td>Maintain a tourist’s profile</td>
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<td>Search for bookings by activity and date</td>
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<td>50 Agent</td>
<td>View the status of a tourist’s booking payment(s)</td>
<td>3 2 Tourist Support</td>
<td></td>
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<tr>
<td>51 Agent</td>
<td>Manually process a credit card payment</td>
<td>3 2 Tourist Support</td>
<td></td>
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<tr>
<td>52 Agent</td>
<td>Register a manual payment (e.g., a mailed check payment)</td>
<td>2 4 Tourist Support</td>
<td></td>
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<tr>
<td>53 Coordinator</td>
<td>Create a new activity</td>
<td>3 3 Catalog Arch, Ux</td>
<td></td>
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</tr>
<tr>
<td>54 Coordinator</td>
<td>Edit an activity</td>
<td>1 3 Catalog</td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>55 Coordinator</td>
<td>Delete an activity</td>
<td>1 3 Catalog</td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>56 Coordinator</td>
<td>Publish an activity</td>
<td>1 3 Catalog</td>
<td></td>
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<tr>
<td>57 Coordinator</td>
<td>Create a new service option</td>
<td>2 3 Catalog Arch, Ux</td>
<td></td>
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<tr>
<td>58 Coordinator</td>
<td>Edit a service option</td>
<td>1 3 Catalog</td>
<td></td>
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<tr>
<td>59 Coordinator</td>
<td>Delete a service option</td>
<td>1 3 Catalog</td>
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<td>60 Coordinator</td>
<td>Associate a service option with an activity</td>
<td>1 3 Catalog</td>
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<tr>
<td>61 Coordinator</td>
<td>Insert an activity into the activity catalog</td>
<td>2 3 Catalog</td>
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<td>62 Coordinator</td>
<td>Remove an activity from the activity catalog</td>
<td>1 3 Catalog</td>
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<tr>
<td>63 Coordinator</td>
<td>Create a new tour package</td>
<td>5 2 Catalog Arch, Ux</td>
<td></td>
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<tr>
<td>64 Coordinator</td>
<td>Add an activity to a tour package itinerary</td>
<td>2 2 Catalog</td>
<td></td>
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<tr>
<td>65 Coordinator</td>
<td>Remove an activity from a tour package itinerary</td>
<td>1 2 Catalog</td>
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<tr>
<td>66 Coordinator</td>
<td>Edit a tour package</td>
<td>2 2 Catalog</td>
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<tr>
<td>67 Coordinator</td>
<td>Configure tour package pricing options and conditions</td>
<td>3 3 Catalog</td>
<td></td>
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<td>68 Coordinator</td>
<td>Insert a tour package into the tour catalog</td>
<td>2 2 Catalog</td>
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<td>69 Coordinator</td>
<td>Remove a tour package from the tour catalog</td>
<td>1 2 Catalog</td>
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<td>70 Partner</td>
<td>Create a new activity</td>
<td>5 3 Partner Catalog</td>
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<td>71 Partner</td>
<td>Edit an activity</td>
<td>2 3 Partner Catalog</td>
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<td>72 Partner</td>
<td>Delete an activity</td>
<td>1 3 Partner Catalog</td>
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<td>Activity</td>
<td>Partner Catalog</td>
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<td>73</td>
<td>Partner</td>
<td>publish an activity</td>
<td>2</td>
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<td>74</td>
<td>Partner</td>
<td>create a new service option</td>
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<td>75</td>
<td>Partner</td>
<td>edit a service option</td>
<td>1</td>
<td>2</td>
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<td>76</td>
<td>Partner</td>
<td>delete a service options</td>
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<td>2</td>
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<td>77</td>
<td>Partner</td>
<td>associate a service option with an activity</td>
<td>1</td>
<td>3</td>
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<td>78</td>
<td>Partner</td>
<td>publish a service option</td>
<td>1</td>
<td>2</td>
<td></td>
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<tr>
<td>79</td>
<td>Partner</td>
<td>search for activity bookings [by various criteria]</td>
<td>3</td>
<td>3</td>
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<tr>
<td>80</td>
<td>Partner</td>
<td>view &amp; print list of activity bookings [by various criteria]</td>
<td>3</td>
<td>3</td>
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<tr>
<td>81</td>
<td>Partner</td>
<td>confirm an activity booking</td>
<td>2</td>
<td>3</td>
<td></td>
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<tr>
<td>82</td>
<td>Partner</td>
<td>search for service option bookings [by various criteria]</td>
<td>3</td>
<td>2</td>
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<td>83</td>
<td>Partner</td>
<td>confirm a service option booking</td>
<td>2</td>
<td>2</td>
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<td>84</td>
<td>Partner</td>
<td>view &amp; print list of service option bookings [by various criteria]</td>
<td>3</td>
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<td>85</td>
<td>Tour Guide</td>
<td>view tourist’s profile information</td>
<td>2</td>
<td>4</td>
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<td>86</td>
<td>Tour Guide</td>
<td>search for activity bookings [by various criteria]</td>
<td>3</td>
<td>4</td>
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<td>87</td>
<td>Tour Guide</td>
<td>view &amp; print list of activity bookings [by various criteria]</td>
<td>3</td>
<td>4</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>88</td>
<td>Tour Guide</td>
<td>search for service option bookings [by various criteria]</td>
<td>3</td>
<td>4</td>
<td></td>
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<tr>
<td>89</td>
<td>Tour Guide</td>
<td>view &amp; print list of service bookings [by various criteria]</td>
<td>3</td>
<td>4</td>
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<td>90</td>
<td>Marketing</td>
<td>set up home page site promotions</td>
<td>5</td>
<td>5</td>
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<tr>
<td>91</td>
<td>Marketing</td>
<td>edit promotional content items</td>
<td>2</td>
<td>5</td>
<td></td>
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<tr>
<td>92</td>
<td>Marketing</td>
<td>send promotional emails to subscribed tourists</td>
<td>10</td>
<td>5</td>
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<tr>
<td>93</td>
<td>Business</td>
<td>view &amp; print booking summary report</td>
<td>2</td>
<td>5</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>94</td>
<td>Business</td>
<td>view &amp; print revenue report</td>
<td>3</td>
<td>5</td>
<td></td>
<td></td>
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</tbody>
</table>
#1  Home Page
Tourist can view the home page when accessing the primary url.

#2  Promotions
Tourist can see the current promotions on the home page (fixed).

#3  Promotions
Tourist can see the current promotions on the home page (from database).

#4  Promotions
Tourist can view a featured tour package promotional info.

#5  Profile
Tourist can create my profile.

#6  Profile
Tourist can edit my profile information.

#7  Profile
Tourist can add an additional tourist to my profile.

#8  Profile
Tourist can subscribe to marketing newsletters, tips, announcements, etc..

#9  Profile
Tourist can delete my profile.

#10 Tour Browsing
Tourist can browse tour packages by included attraction/point of interest name.

#10.1 Tour Browsing
Tourist can browse tour packages by region.

#10.2 Tour Browsing
Tourist can browse tour packages by included activity type.

#10.3 Tour Browsing
Tourist can browse tour packages by included attraction/point of interest name.

#11 Promotions
Tourist can view a tour package promotional info.

#12 Booking
Tourist can one click book a tour package.

#13 Planning
Tourist can create a new proposed itinerary from a tour package.

#14 Activity Browsing
Tourist can browse activity catalog by region.

#14.1 Activity Browsing
Tourist can browse activity catalog by activity type.

#14.2 Activity Browsing
Tourist can browse activity catalog by attraction/point of interest name.

#14.3 Activity Browsing
Tourist can view the master activity calendar.

#14.4 Activity Browsing
Tourist can filter the master activity calendar by various criteria.

#15 Activity Browsing
Tourist can view the master activity calendar.

#16 Activity Browsing
Tourist can filter the master activity calendar by various criteria.
#17  Planning  
Tourist can add an activity to my wish list.

#18  Planning  
Tourist can view, search, sort and filter wish list activities.

#19  Planning  
Tourist can remove an activity from my wish list.

#20  Planning  
Tourist can view a wish list activity details.

#21  Planning  
Tourist can view a calendar of a wish list activity schedules.

#22  Planning  
Tourist can add a wish list activity to a proposed itinerary from calendar.

#23  Planning  
Tourist can create a new proposed itinerary.

#24  Planning  
Tourist can remove a proposed itinerary.

#25  Planning  
Tourist can view the list of my proposed itineraries.

#26  Planning  
Tourist can add an activity to a proposed itinerary.

#27  Planning  
Tourist can add a tourist to a proposed itinerary.

#28  Planning  
Tourist can select and edit activity & service options.

#29  Planning  
Tourist can remove an activity from a proposed itinerary.

#30  Planning  
Tourist can view a proposed itinerary summary.

#31  Planning  
Tourist can view a proposed itinerary schedule.

#32  Planning  
Tourist can view a proposed itinerary activity details.

#33  Planning  
Tourist can view proposed itinerary conflicts.

#34  Planning  
Tourist can resolve a proposed itinerary conflict.

#35  Booking  
Tourist can book a proposed itinerary.

#35.1  Booking  
Tourist can review & confirm proposed itinerary.

#35.2  Booking  
Tourist can automatically cross-book partner services for an itinerary.

#35.3  Booking  
Tourist can reserve partner services for an itinerary.

#35.4  Booking  
Tourist can pay for a booking [various payment methods].

#35.4.1  Booking  
Tourist can enter credit card information.
35.4.2 Booking

Tourist can process credit card payment.

35.4.2.1 Booking

Tourist can process VISA/MC/Discover payment via gateway 1.

35.4.2.2 Booking

Tourist can process AMEX payment via gateway 2.

35.4.3 Booking

Tourist can enter check payment information.

35.5 Booking

Tourist can confirm partner services booking for an itinerary.

35.6 Booking

Tourist can view booking confirmation.

36 Booking

Tourist can view my list of bookings.

37 Booking

Tourist can view & print a booking summary.

38 Booking

Tourist can view & print a booking schedule.

39 Booking

Tourist can view & print booking activity info.

40 Booking

Tourist can subscribe to booking reminders.

41 Booking

Tourist can subscribe to activity reminders.

42 Tourist Support

Agent can search for a tourist.

43 Tourist Support

Agent can view a tourist’s profile.

44 Tourist Support

Agent can maintain a tourist’s profile.

45 Tourist Support

Agent can search for a tourist’s proposed itineraries.

46 Tourist Support

Agent can maintain a tourist’s itinerary.

47 Tourist Support

Agent can search for a tourist’s bookings.

48 Tourist Support

Agent can search for bookings by activity and date.

49 Tourist Support

Agent can maintain a tourist’s booking.

50 Tourist Support

Agent can view the status of a tourist’s booking payment(s).

51 Tourist Support

Agent can view a tourist’s profile.

52 Tourist Support

Agent can manually process a credit card payment.

53 Catalog

Coordinator can create a new activity.
#54 Catalog Coordinator can edit an activity.

#55 Catalog Coordinator can delete an activity.

#56 Catalog Coordinator can publish an activity.

#57 Catalog Coordinator can create a new service option.

#58 Catalog Coordinator can edit a service option.

#59 Catalog Coordinator can delete a service option.

#60 Catalog Coordinator can associate a service option with an activity.

#61 Catalog Coordinator can insert an activity into the activity catalog.

#62 Catalog Coordinator can remove an activity from the activity catalog.

#63 Catalog Coordinator can create a new tour package.

#64 Catalog Coordinator can add an activity to a tour package itinerary.

#65 Catalog Coordinator can remove an activity from a tour package itinerary.

#66 Catalog Coordinator can edit a tour package.

#67 Catalog Coordinator can configure tour package pricing options and conditions.

#68 Catalog Coordinator can insert a tour package into the tour catalog.

#69 Catalog Coordinator can remove a tour package from the tour catalog.

#70 Partner Catalog Partner can create a new tour package.

#71 Partner Catalog Partner can edit a tour package.

#72 Partner Catalog Partner can delete an activity.

#73 Partner Catalog Partner can publish an activity.

#74 Partner Catalog Partner can create a new service option.

#75 Partner Catalog Partner can edit a service option.

#76 Partner Catalog Partner can delete a service option.

#77 Partner Catalog Partner can associate a service option with an activity.
Partner Catalog

Partner can publish a service option.

Partner Booking

Partner can search for activity bookings [by various criteria].

Partner can view & print list of activity bookings [by various criteria].

Tour Guide Booking

Tour Guide can view tourist’s profile information.

Tour Guide can view & print list of activity bookings [by various criteria].

Tour Guide can view & print list of service option bookings [by various criteria].

Partner can confirm an activity booking.

Partner can confirm a service option booking.

Tour Guide can confirm an activity booking.

Tour Guide can confirm a service option booking.

Marketing can set up home page site promotions.

Marketing can edit promotional content items.

Marketing can send promotional emails to subscribed tourists.

Business can view & print booking summary report.

Business can view & print revenue report.

Promotions

Business Reports

Business Reports

Business Reports

Business Reports