

Creating “User Stories” To Guide Procurement

Module 4.2

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This resource will be most useful for institution leadership, technology procurement teams and/or steering committees engaged in student success technology strategy

User Stories 101

What Is A User Story?

A user story is a “bite-sized” self-contained description of a single feature.

It is written from the end-user’s perspective and typically follows the template:

“As a [user title], I want to [be able to do x action] so that I can [accomplish y goal].”

Why Are User Stories Helpful?



Translate problem statements into solution ideas



Aggregate user feedback to prioritize tools and features



Provide specific vision as college navigates technology landscape



Help institution staff articulate technology needs clearly with vendors and with one another

Creating User Stories: Example

Generating a comprehensive list of user stories begins with knowing who you need to talk to – your end-users. Then, the procurement team can begin interviewing your end-users to understand more about their respective technology needs and priorities. After the interviews are complete, end-user feedback can be translated into individual user stories. This process should help to illuminate insights around which features or issues are the most important to address both within and across user groups.



End-User Interviewee

Consider: Who will be using the technology on a regular basis? Who will implement it? Maintain it?



Interview Notes

Consider: For end-users, aim to sketch a vision for what the new process should look like from their perspective. What does the future-state day-in-the-life of [X end-user] look like?



User Stories

Distill end-user feedback into specific objectives. At this stage, stories do not need to be prescriptive. Focus more on what you want the tool to do, not the specifics of how you want that functionality to be delivered.

Example List:

- Advising staff & leadership
- Faculty
- Students
- Student Support staff & leadership

Example Questions:

- Walk me through what your ideal process [to do x task] would look like. What functionality do you need to complete that task?
- What information would you need to access, at a minimum?

Example User Story:

“Filter students by attributes such as [x,y,z] to send batch emails” rather than “Send an email reminder via Outlook to register for classes to all students who have not registered by a specified date.”

Creating User Stories: Example



End-User Interviewee



Interview Notes



User Stories

Name:
Andres Apple

Role:
Advisor

"I'd like to be able to see a list of all the students assigned to me, and information on each student, such as their current course load, GPA, and notes from the support staff and faculty. I want to be able to communicate with students, one-on-one but also filter and reach specific groups, like all students who haven't registered. It'd be nice if I could manage my appointments from that same system too. That way I'm not bouncing between five screens."

As an **advisor**, I want to:

- See a list of my assigned students
- Click into each student to see key profile information, recent activity, communication, academic record data, and notes from other support staff and faculty
- Filter students by registration status and other attributes (to be defined)
- Communicate with students through platform
- Schedule and manage appointments

Note: Several of the tools in this module have been adapted from The Ada Center's 2021 publication, [Advising Technology Procurement and Planning Playbook](#). This resource was made possible through generous contributions from the Bill and Melinda Gates Foundation and is freely available [here](#).



Creating User Stories: **Worksheet**

Brainstorming: End-User Interviewees and Questions

Next Step Planning



Brainstorm: Who are a few end-users you might want to speak with?



Brainstorm: What questions might we want to ask?



Creating User Stories: **Worksheet**

Sample Worksheet: Interview Notes to User Stories

Key Points from Interview

Ex: Advisor - "I can't just email all my students with a Bright Futures scholarship."

User Story Translation

As an advisor, I want to be able to:

- *Tag students with a scholarship*
- *Filter for scholarship students*
- *Select and batch email scholarship students...*



Creating User Stories: **Worksheet**

Sample Worksheet: Aggregated User Stories

User Story	Frequency Mentioned	Notes

Next Steps

At this point, you may have an extensive list of user stories. In the coming segments, we will explore how to turn this wish-list into a realistically scoped set of feature requirements and how to strategically sequence the products or features that your institution wishes to buy.



Read Module 4.1 How Should We Approach Buying New Technology?

⌚ <1 hour



Watch and Complete Module 4.2 Creating “User Stories” to Guide Procurement – Webinar

⌚ 3-4 hours



Review and Complete Module 4.3 Check Your Basement: Avoiding Duplicative Technology

⌚ 2 hours



Watch and Complete Module 4.4 How Can I Prioritize Competing Technology Needs? – Webinar

⌚ < 1 hour



Read and Apply Module 4.5 RFP 101: Getting Insight Without “Giving Away the Answers”

⌚ 3-4 hours



Read and Apply Module 4.6 Vendor Engagement Toolkit

⌚ 1-2 hours

Module 4.2 Individual Reflection:

- 1) Which user stories came up the most frequently in your interviews? Is this different from what you expected?
- 2) How did end-users align or differ in regard to their technology needs?
- 3) As you progress in your procurement efforts, how might you continue to signal to end-users that their input has been heard (even if you cannot get tools that meet every single one of their needs)?



About This Series

This five-part instructional series on Student Success Technology is designed for minority serving institutions (MSIs) and their friends. Taken together, these instructional resources aim to provide practitioners with the tools to establish and maintain a technology ecosystem that effectively supports the institution's broader student success and equity goals. The exercises and resources within these modules are also widely applicable across the higher education field.

This resource was compiled with generous funding from the Bill & Melinda Gates Foundation and was authored by The Ada Center based on six years of insight from The Ada Center's work with hundreds of MSIs and access-focused institutions. The curriculum would not be possible without the thought partnership and support from Complete College America and the Advising Success Network.

For additional curriculum modules, please visit:

www.completecollege.org/navigating-student-success-technology

For questions about this resource, or to explore additional higher education technology research and tools, please visit

www.theadacenter.org/resources.