

User Stories for Marketing / BD Projects

Whether you are designing a new process or changing one of your existing services, collecting and analyzing input from your customers is always a good idea. Traditional ways of collecting input, include surveys, focus groups, brainstorming sessions, formal business requirements documentation, and unstructured “asking around.” These approaches often produce a lengthy wish list of points, some of which will overlap and contradict each other. In these situations it can be difficult to sort out the critical needs from “nice to haves”.

One useful way to focus customer input is a tool called **User Stories**. This tool is used in Agile software development to capture a simple description of a software feature from an end-user perspective. In essence, User Stories help the developer and the user to focus on how a feature will benefit the user’s life.

Basically, a User Story employs the following format:

| | |
|-----------------|---|
| As a: | <business role> |
| I want: | <description of the feature needed> |
| So that: | <description of what the feature will help the user accomplish> |

Here’s a completed example of a user story for one metric on a marketing dashboard

| | |
|-----------------|--|
| As a: | CRM Coordinator |
| I want: | To know how many contacts have specific fields that haven’t been updated in a specific amount of time (title, company, email address) |
| So that: | We can determine the health of our system by knowing how many contacts need significant review, for example if they have not been updated in 10 years. We can develop a data maintenance plan to fix it |

The User Story approach is best used in a group setting. It forces users to articulate how they will use a feature and why it matters to them.

For Further Reading

Here are some useful references on User Stories

- [How to write a user story](#) (yodiz.com)
- [Writing User Stories, Examples and Templates In Agile Methodologies](#) (yodiz.com)
- [10 Tips for Writing Good User Stories](#) (romanpichler.com)
- [Agile User Story Template](#) (Projectmanagementdocs.com)
- [The Ultimate Guide to Creating a Kickass User Story](#) (Codingsans.com)