



KANOPI STUDIOS

Plan Your Site with User Stories

UCSF Summer Series | July 2020



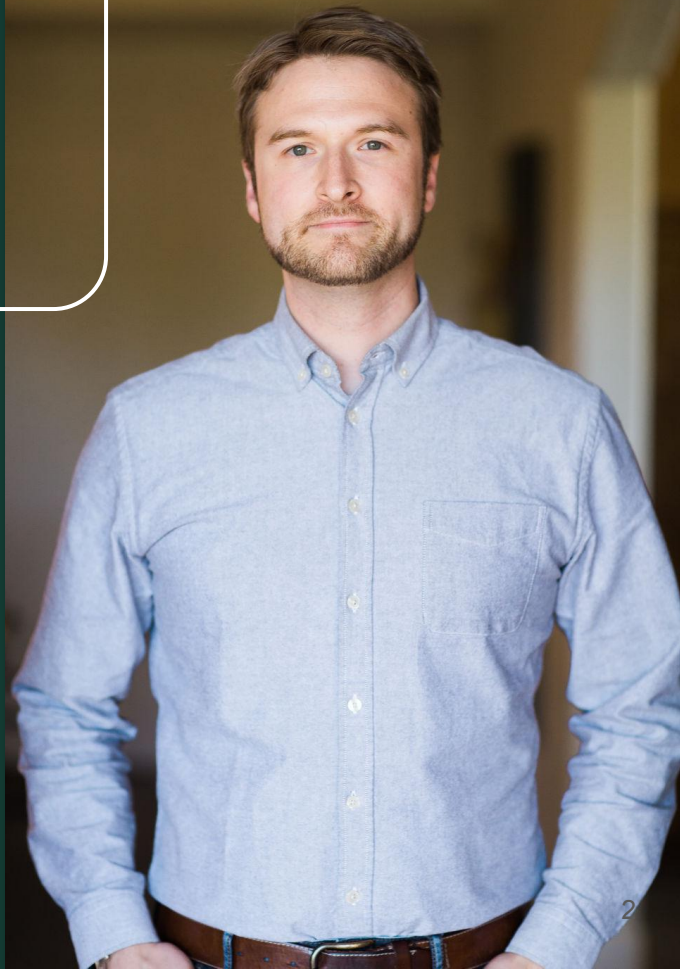
Tim Tufts

**DIRECTOR OF
PROJECT SUCCESS**

Kanopi takes care of the whole website lifecycle for clients that want to make a positive impact.



tim@kanopi.com
www.kanopi.com





KANOPI STUDIOS

UCSF Summer Series

<https://info.kanopistudios.com/ucsf-summer-web-series>



Eight Wednesdays:

- ~~— June 24: Managing Multiple Editors~~
- July 8: Plan Your Site with User Stories
- July 22: How a Website's UX Impacts a Brand
- Aug 5: Don't Panic! Drupal 7 Still Has life!
- Aug 19: How to Write Inclusive Content
- Sept 2: How to Do an Effective Content Audit
- Sept 16: Website Terms and Definitions
- Sept 30: Reorganize Navigation for Success

Agenda



What is a user story?

Why user stories?

Getting started

User stories in practice

Q & A



What is a user story?



Defining User Stories

What is a User Story?

A concise statement that provides an outline of the work that needs to be done, as well as the value it will bring.

Who creates User Stories?

Most commonly created by project leads, technical architects, and developers, but anyone can create User Stories. Those are then reviewed and used by someone with the appropriate skill set to execute the work.

When do you create User Stories?

User Stories should be created during the planning stages of a project, but they can be refined as progress is made and goals change.



The User Story Formula



As a *[user]*, **I** *[want/need]*
to *[action]* **so that** *[reason]*

Sample User Stories

1. As a user, I want to be able to search for content so that I can find it without the navigation.
2. As a website admin, I want to be able to promote content on the homepage so that it appears more prominently to users.
3. As a user, I need a means of navigating the site so that I can find additional content.
4. As a user, I want a way to contact the organization so that I can ask them a question.



Why user stories?



Creating a Clear Picture



As a *[user],*

The who

I *[want/need]*

The urgency

to *[action]*

The what

so that *[reason]*

The why



The Start of a Conversation

While an individual may be responsible for User Stories, it is ultimately up to the team to review.

1. Gain a better understanding of user needs.
2. Determine the priorities of the organization.
3. Establish a foundation for functional requirements.



Getting started



What are you trying to accomplish?

1. Brand new site?
2. Fixing up an existing site?
 - a. Changing the design?
 - b. Backend content manager edits?
3. Moving to a new platform?

Where to Begin

Appoint Writer

Identify an individual who is well versed in the goals of your organization and the needs of your users.

Epics

High-level categorizations of the areas of your project you'll write stories for.
ie. Search, Navigation, etc.

Stories

Begin writing the Epics, then User Stories. Create more Epics as needed.

Review/ Requirements

Review User Stories with the team, refine them and add requirements.

Get to Work

Queue User Stories by priority and begin executing the work.



User stories in practice



Planning for Implementation

1

Prioritize

Identify the work that is most important to the goals of the project, and queue them accordingly.

2

Action

Implementation team runs with the work that has been queued.

3

Revisit/Refine

Review the work that's been completed, and revisit User Stories to see if they need to be refined at all.

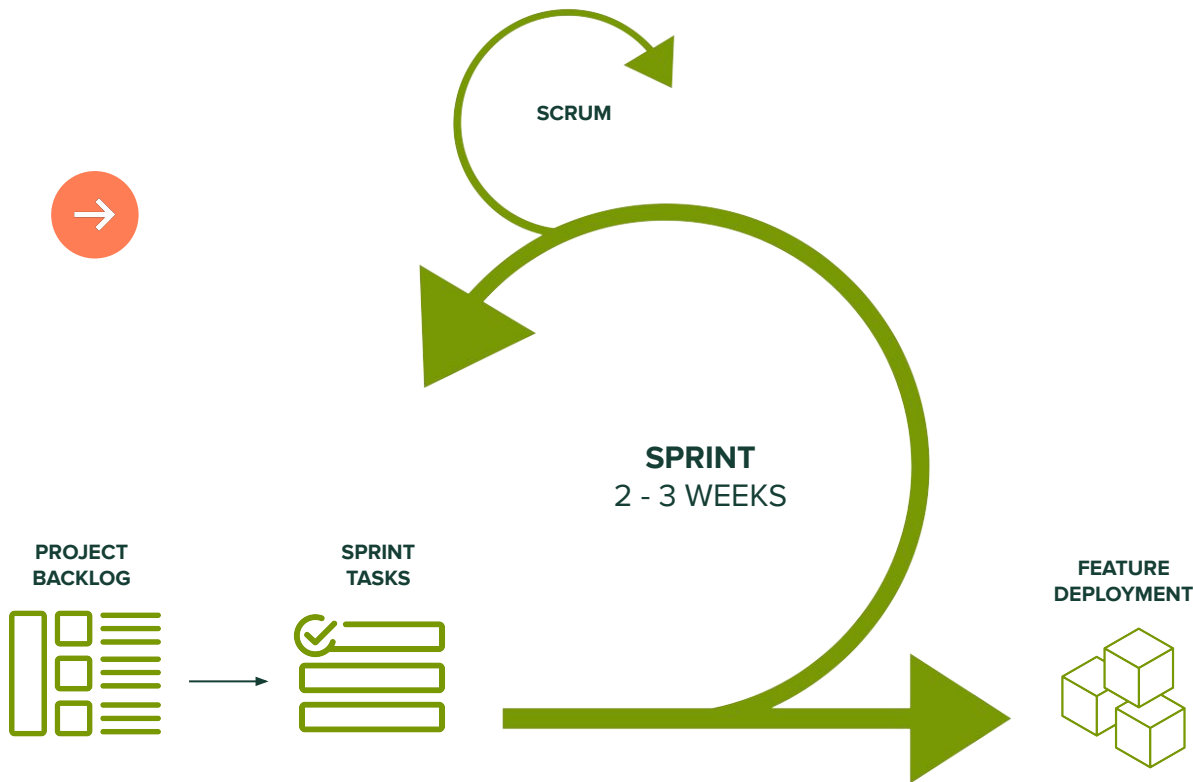
4

Repeat

Queue the next group of work and continue with implementation.

A Beginning in Agile

User Stories really got their start in Agile Development. The iterative approach works well with User Stories flexibility.





Questions?



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Want more help?

Questions? Comments?
Reach out to us anytime.



ANNE STEFANYK

anne@kanopi.com

@anne_kanopi

BOOK A MEETING

bit.ly/meet-kanopi

Core Business Challenge:

While the Vode Lighting site has an attractive design aesthetic, it is challenging to serve compelling content to specific audiences. The site is not responsively able to meet users where they are.

Content layouts are inflexible and the gallery lacks the visual impact to showcase the work and the products in an absorbing way.



Introductions

Kanopi Studios creates open source websites that make an impact.



ANNE STEFANYK

CEO

anne@kanopi.com



KATHERINE WHITE

CEO

kat@kanopi.com



Your Pathway to Kanopi

Our Client Engagement team
would love to help you make
your site more accessible.



ANNE STEFANYK

CEO

anne@kanopi.com



TANYA THRELFALL

BUSINESS DEVELOPMENT

tanya@kanopi.com



SUBHEAD HERE

**This is
where you'd
put a large
quote.**



John Doe

TECHNOLOGY MANAGER

Client since 2012



Core Business Challenge:

While the Vode Lighting site has an attractive design aesthetic, it is challenging to serve compelling content to specific audiences. The site is not responsively able to meet users where they are.

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Project Goals

NAME GOAL ONE HERE

Achieve a balance of product information and story-telling of the “why” and your case studies.

Integrate “next step” conversion points to keep the user exploring and engaged to convert.

NAME GOAL TWO HERE

Compose a responsive user experience and visual design which will allow your beautiful imagery to shine.

Set yourself apart from competitors with a modern and engaging design which reflects your brand.

NAME THE THIRD GOAL HERE

Migrate the site from Drupal 7 to a current CMS, for near-term and future needs.

Provide a flexible and easy content editing experience.

Project Goals

1

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1

ITEM HERE

Achieve a balance of
product information
lorem ipsum

2

ITEM HERE

Achieve a balance of
product information
lorem ipsum



3

ITEM HERE

Achieve a balance of
product information
lorem ipsum

4

ITEM HERE

Achieve a balance of
product information
lorem ipsum



PARAGRAPH TITLE

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Quisque sodales a nunc quis vestibulum. Donec ut massa nisi. Vestibulum quis vehicula odio, porttitor efficitur dui.

PARAGRAPH TITLE

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Quisque sodales a nunc quis vestibulum. Donec ut massa nisi.



Conversion optimization

Thoughtful optimization of newsletter calls to action sitewide has created visible impact.



207%

2018 INCREASE IN NEWSLETTER SIGNUPS

The site redesign (2012), brought the Mises Institute an astronomical increase in subscribers. This has lasted year over year; there was a 207% increase in signups in 2018.



KANOPI STUDIOS

Headline

Build on the existing site look and feel to create a responsive, flexible design system and revised gallery experience that elevate Vode's products across a spectrum of user expertise.





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Build on the existing site look and feel to create a responsive, flexible design system and revised gallery experience that elevate Vode's products across a spectrum of user expertise.



SLIDE TITLE

You will meet the support team and they will handle any requests with the support of the build team.

We have 10 hours budgeted for this window.





SLIDE TITLE

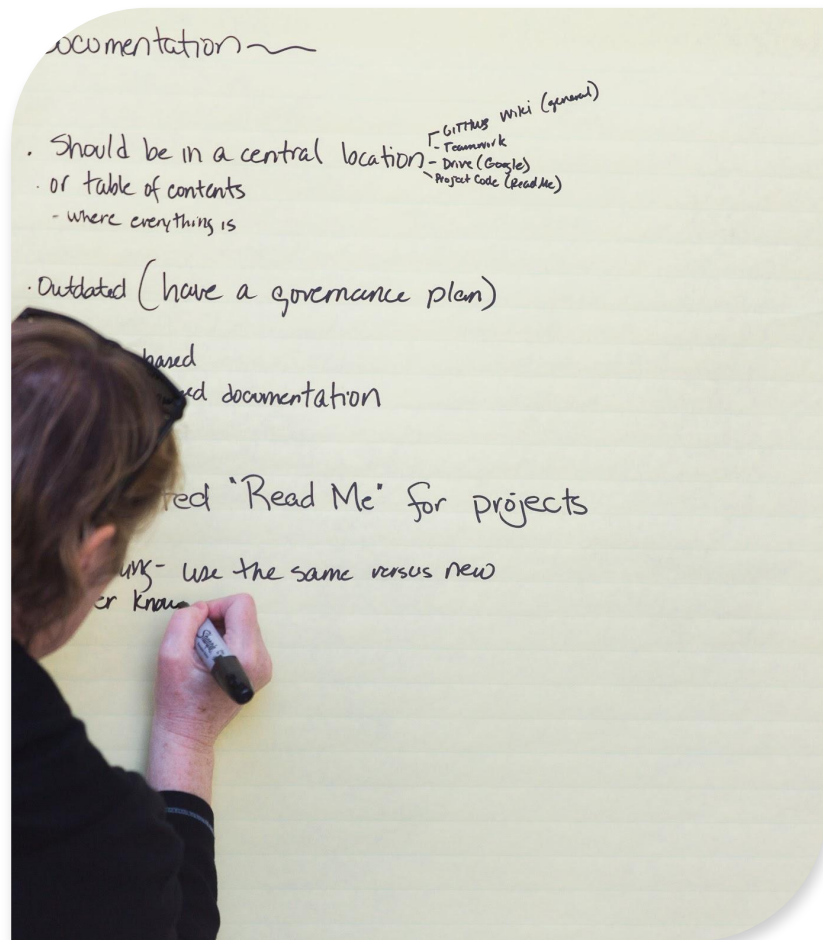
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Headline

Build on the existing site look and feel to create a responsive, flexible design system and revised gallery experience that elevate Vode's products across a spectrum of user expertise.





Headline

Short amount of text that only goes to a few lines lorem ipsum dolor set amet.

Nam vel augue nec augue eleifend
auctor nec sed augue. Curabitur
facilisis laoreet leo.





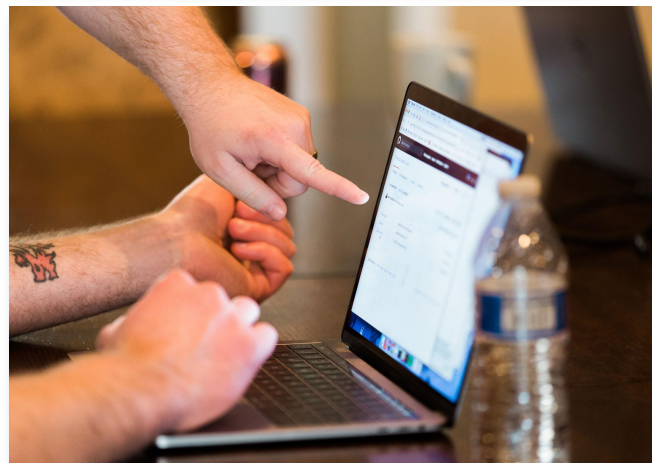
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|
Nam vel
augue nec
augue
eleifend
auctor nec
sed augue.
Curabitur
facilisis laoreet
leo.





Title Here

Lorem ipsum dolor sit amet, consectetur.



Title Here

Lorem ipsum dolor sit amet, consectetur.



1

**HERE'S A POINT AND IT'S
TWO LINES LONG**

We are over 50% female here at Kanopi, and bring a diverse voice to technology.

2

HERE'S ANOTHER POINT

Our clients focused on continuous improvement account for 50% of our business.

3

**HERE'S A POINT AND IT'S
TWO LINES LONG**

Great work attracts great clients and employees. We look forward to impressing you too.



SUBTITLE

The Reality And How You Can Make it Work





|

Nam vel augue nec
augue eleifend
auctor nec sed
augue. Curabitur
facilisis laoreet leo.





Small bites that create big wins.

Integer sit amet augue lectus. Integer pellentesque ornare eros, nec pellentesque elit dignissim vel. In rhoncus nisi at nisi euismod pellentesque.

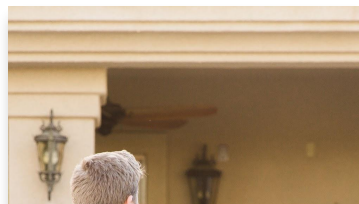
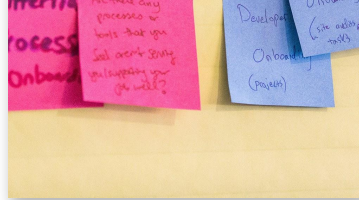




KANOPI STUDIOS

Project Vision

Build on the existing site look and feel to create a responsive, flexible design system and revised gallery experience that elevate Vode's products across a spectrum of user expertise.





EARLY VISITORS

70% are considered
visually impaired

30% are considered
dyslexic

ANTICIPATED SPLIT

30% are considered
visually impaired

70% are considered
dyslexic

Demographics

Statistics around lorem ipsum dolor set amet from 12/2018 to March 2019

215

Current Bookshare members

70%

Individuals with vision impairment use Bookshare

30%

Individuals with a reading difficulty using Bookshare

85%

Of Bookshare members are students

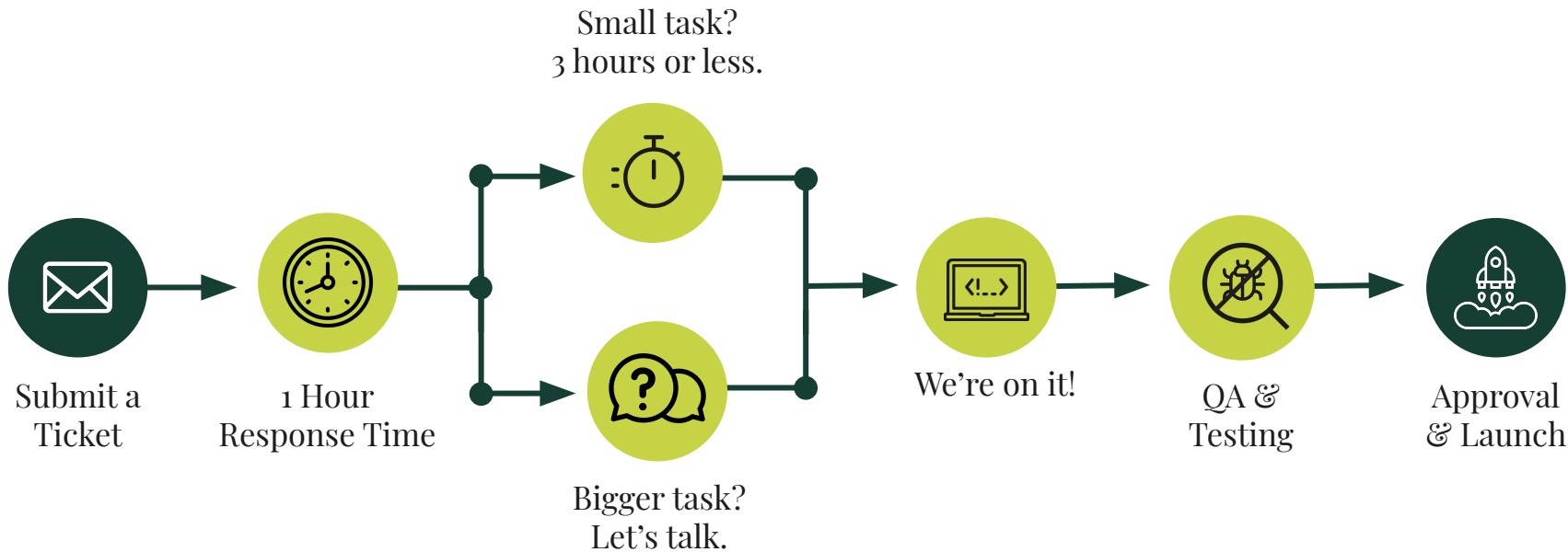
16 years

Average age of a student member

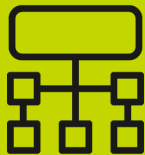
1,673

Total number of books downloaded. **7.8 downloads / member**

Horizontal Diagram



Another Diagram



NAME HERE

Achieve a balance of product information and story-telling of the “why” and your case studies.



NAME HERE

Compose a responsive user experience and visual design which will allow your beautiful imagery to shine.



NAME HERE

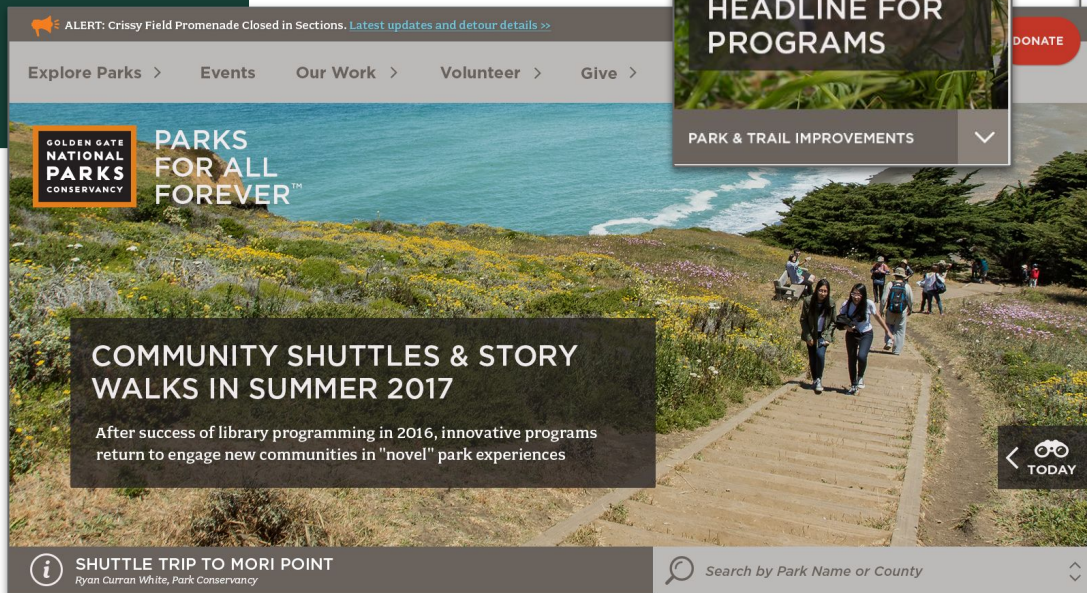
Migrate the site from Drupal 7 to a current CMS, for near-term and future needs.

Example: Designs



Full Example -
Desktop

Full Example -
Mobile



—
Oh, and
by the way . . .



USE YOUR HOURS AS YOU LIKE

Use your hours for anything that touches your site: from emergency fixes, to security, to modules, to design, and more.

WE ONLY HIRE EXPERTS

Our staff is all senior level. Our team examines problems from all angles, integrating strategy, design and development.

WE ARE FLEXIBLE WITH PRICING

We work with you to create a plan that fits your needs and budget. And any unused hours will roll over to the next month.

YOU'LL HAVE A DEDICATED TEAM

You'll get a dedicated support team, including a Project Manager who will be ready to respond within the hour.

YOU'RE COVERED FROM 9 TO 5

We're there when you need us. Support is available from 9 am to 5 pm in YOUR local time zone. And we respond within an hour.

WE LOG BY THE MINUTE

Our job is to save you money. That's why we log by the minute rather than by the hour

Schedule

[illegible]

If you need a sprint schedule

Sprints in this example timeline are approximately 1 week in length.

Actual Sprint duration will be established during the course of development.

This equates to a 17-week timeline.



Sprints 1-2

Kickoff, Setup Activities, Sprint Planning

Sprint 3-6

Content Structure

Sprint 7

User Roles, Permissions, Workflows

Sprints 8-9

ADFS Integration

Sprints 10-13

Views

Sprints 8-14

General Theming & Layouts

Sprint 14-15

Feeds, Custom Code

Sprint 16

Forms, Search

Sprint 17

Quality Assurance, User Acceptance Testing

*This timeline is dependent on client approvals with 2 business days.
We are happy to modify the overall timeline if more time is required.*

Another List

With intro text if needed.

- All deployments will be handled by the IMS developers.
- The final deliverable is a working migration with instructions on how to perform the migration, since Kanopi may not have full access to perform the migration.
- A functioning OAuth server is already provided by the Legacy Drupal 7 site.
- If IMS decides to migrate the current Drupal 8 site from Platform.sh to Pantheon or any other host, this will not occur during Kanopi's work on the User and Content migration.
- The code for the Drupal 8 site is generally in working order and no major updates to accommodate new versions of PHP 7 will be performed by Kanopi.
- Beyond the Migrate modules themselves, no other modules or features will be performed as part of the Migration work.
- The new site will continue to use Drupal Core's Image module for media management, not Core's Media module.
- All entities that must be migrated have been documented in the RFP.

A layout with numbers

In case we need something
with items listed out.



1

CODE ANALYSIS

Review all core, contributed, and custom code to be sure the site can be safely and effectively updated.

2

ACCESSIBILITY SCAN

Automated and manual testing to ensure the site is usable by users of all types and abilities.

3

SEO REVIEW

Examine the site configuration and theme structure to ensure the site is maximizing your reach.

4

SECURITY & PERFORMANCE

Evaluate site hosting, performance, and security against industry benchmarks.



A headline goes here

Customer service is number one at Kanopi Studios, meaning we proactively work with you to improve the success of your website



ORIENTATION

We ensure you are onboarded to the program and set up for success from the start. You will always have help standing by.

30-60-90 DAY CHECK-INS

Our Client Success team checks in with you at 30, 60, and 90 days to ensure you are thrilled with Kanopi.

STRATEGY SESSIONS

We book quarterly or biannual strategy sessions after your first 100 days. It's a chance to step back, plan, and make sure we hit or exceed our targets.

THOUGHTFUL & HELPFUL

We listen, we ask 'why', and we are always looking for the best solution for our clients. We value our long term relationships.



Project Team

A bit of text here.



NAME HERE

Their Title



NAME HERE

Their Title



NAME HERE

Their Title



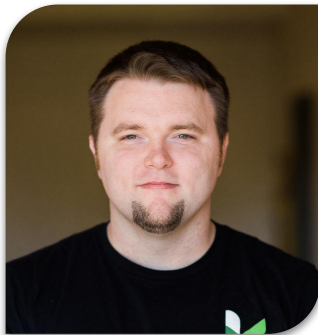
Project Team

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NAME HERE

Their Title



NAME HERE

Their Title



NAME HERE

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NAME HERE

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NAME HERE

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NAME HERE

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NAME HERE

Their Title

The Team



1 KATHERINE WHITE
Chief Technology Officer

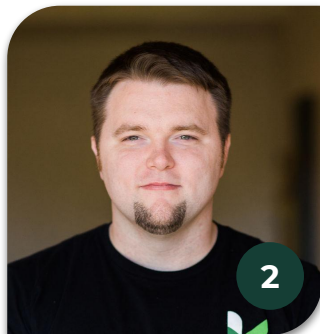


2 TIM TUFTS
Director of Project Success



3 JESSICA SKEWES
Director of Ideation

The Team



- 1 JIM BIRCH**
Drupal Tech Lead
- 2 SEAN DIETRICH**
Senior Operations Architect
- 3 ANNE BONHAM**
Drupal Engineer
- 4 SHIRAZ DINDAR**
Senior Drupal Engineer
- 5 BLANCA ESQUEDA**
Drupal Technical Lead
- 6 RICKY PUGH**
Quality Assurance Engineer



Canopy

kan·o·py | \ 'ka-nə-pē

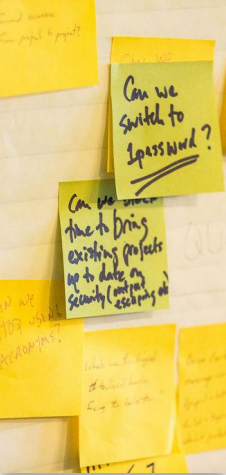
The *canopy* layer supports the majority of primary productivity in forests. It provides protection from strong winds and storms, while also intercepting sunlight and precipitation for continued growth.

Kanopi

kan·o·pi | \ 'ka-nə-pē

Kanopi **designs, builds** and **supports** websites for clients that want to make a positive impact.

Our holistic approach infuses strategy and creative thinking through all stages of your site's lifecycle, providing the tools you need to nourish, support, and grow your business.



Support like no other

50% of our business is for clients focused on continuous improvement.



Woman Owned & Woman Led

We are over 50% female, and bring a diverse voice to technology.



95% word of mouth referrals

Great work attracts great clients and employees. We look forward to impressing you too.

-
- Founded in January 2010
 - 44+ employees, all senior-level
 - Distributed throughout North America
 - Client base: USA and Canada
 - Open-source: Drupal & WordPress
 - [Drupal Association member](#), with several Acquia-certified developers on staff
 - Community focused: on the Leadership staff for WordCamp US, BADCamp, and the San Francisco Drupal Users Group (SFDUG), as well as work in the Drupal issue queues daily.





KANOPI STUDIOS

—
Thank you!
—

Reach out anytime.
anne@kanopistudios.com
+1-415-517-0830