Summary

Stories are a powerful tool in user experience design. They can help you understand users—and their experiences—better, communicate what you've learned, and use that understanding to create better products. Whether you are a researcher, designer, analyst, or manager, you will find ideas and techniques you can put to use in your practice.

Stories have many uses in user experience design and can be integrated into your own process.

- They can describe a context or situation, like stories that are part of personas.
- They can illustrate problems and "points of pain," explaining why a new experience is needed.
- They can be the starting point for a design discussion, explore a new design concept, or describe a new design.

CHAPTER 2

How UX Stories Work

Some people think of telling a story as a form of broadcasting. Claude Shannon, sometimes called the "father of information theory," looked at communication as a sort of transmission of a message from one place to another. From this perspective, a story would be something simply transferred from one person to another, like an exchange of goods or a signal on a wire, as shown in Figure 2.1.

This seems simple enough. You write a story, and then you tell it. You might consider your audience as you write the story, but telling the story is just broadcasting it. A lot of bad speakers seem to see it this way as well.

But it's not that simple.

Good storytelling is interactive. It's more like a conversation than a broadcast, even when the stories are carefully crafted and rehearsed. Actors and directors talk about how the audience is different at every performance, even if the script or the stage action is the same from night to night.

Stories work the same way. They are as much a part of the audience as of the storyteller. They come to life in the imaginations of the audience members, whether it is one person or hundreds of people.

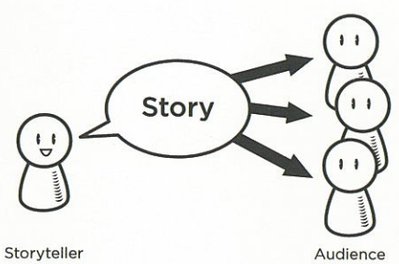

FIGURE 2.1
Some people think of stories as a broadcast, a one-way communication from storyteller to audience.

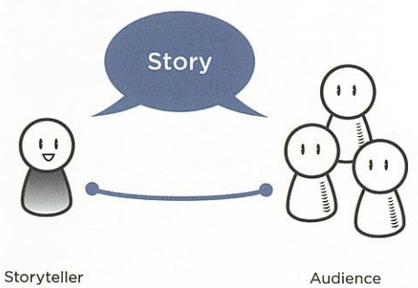

FIGURE 2.2
The Story Triangle shows the connection between storyteller and the audience: the audience hears the story, but also shares their reactions with the storyteller.

This is especially true when you are telling a story in person, as part of a presentation or in a discussion. The story becomes part of a dialogue between the storyteller and the audience, even if the audience is silent. This set of relationships between the storyteller, the story, and the audience is called the Story Triangle (shown in Figure 2.2). It defines the interdependency of these three elements in any story experience. You can see how it works in Figure 2.3

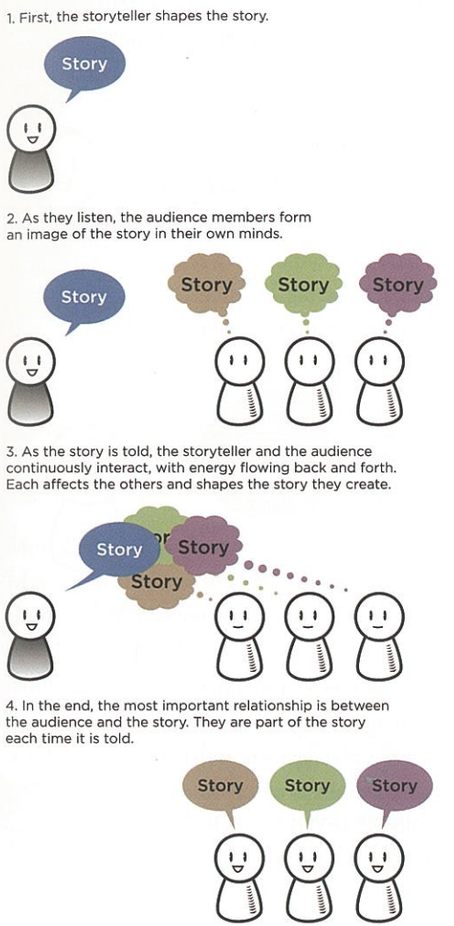

FIGURE 2.3
How stories work.

Something similar happens with written stories, except that the dynamic exchange between storyteller and audience is missing. The audience still makes the story their own, understanding it in their own terms. They might be engaged or uninterested, believe the story entirely, or doubt it. But they are still part of the full story experience.

What this means is that it is not enough to have a good story. You must have a good story *for your audience*. It has to suit the purpose for which you created it and fit the context in which you will share it. The stories you tell to entertain are very different from the stories you tell for business purposes. Stories in user experience are usually created for a specific audience and for a specific reason.

Stories are more than just narrative

The core of a story is usually a sequence of events. Without that sequence, nothing "happens." You might have a description of a scene or a character, but it's not really a *story* until you have events, decisions, and actions, or at least a reaction to a situation or environment (see Figure 2.4).

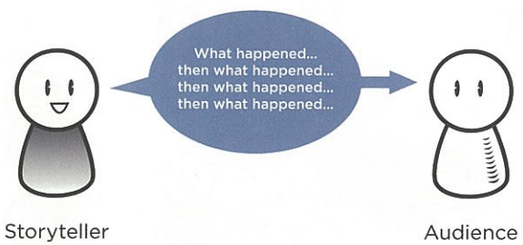

FIGURE 2.4
Stories are more than just a description of a series of events.

Sometimes, events can be implied through context, but you'll learn more about that in Chapter 13, "Combining the Ingredients of a Story." Stories that are just narrative events—a series of statements of "what happened"—aren't very interesting. They can be useful as a way to describe the details of an interaction. Use cases and flow charts are like that. They strip away everything except the specific actions that are at the core of a user experience.

Stories play a more complex role. They not only describe actions, but also explain them and set them into a context that helps you understand why they happened.

The first step in building a story is to add motivation. The goals and motivations of the characters can be clearly described, or they can be implicit, but it's the notion that people do things for a reason that makes stories so interesting. We want to know *why* something happened, not just what happened (see Figure 2.5). If we aren't told why, we are likely to invent a reason for ourselves.

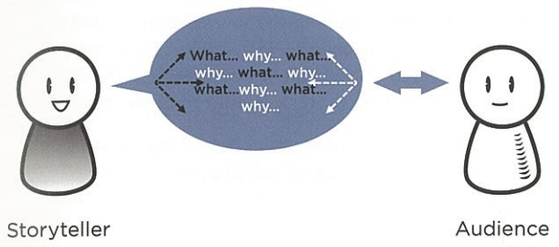

FIGURE 2.5
Why things happen can be as interesting as *what* happened.

Adding the reasons why the events occurred is the first step in creating a good user experience story, that is, a story that communicates enough information to be useful as a way of explaining a user context or triggering design ideas.

Motivation and goals are often deeply embedded in a cultural context. Many stories rely on some level of shared cultural context as a kind of shorthand. When folk stories are told and retold in different cultures, they are adapted. Details are changed to make the context for the story more familiar—or stranger—to the audience.

THE ANT AND THE GRASSHOPPER: TWO VERSIONS OF THE SAME STORY

Laura Packer retells one of Aesop's fables to show how one basic story can be cast in different settings and told in different ways. The first version is loosely based on the Harvard Classics.

1: The Classic

Once upon a summer's day, a Grasshopper was dancing and singing in a field. She saw an Ant walk by, sweating and struggling to carry a kernel of corn twice as big as she was. The Grasshopper kept dancing and singing, then later saw the same Ant struggling by with another kernel of corn, on her way to the nest.

"Why not stop and talk with me? We could sing and dance instead of you working so hard."

"I am putting food away for the winter, and I suggest you do the same."

"Why should I worry about winter?" replied the Grasshopper. "I have plenty to eat right now." The Ant shook her head and continued her hard work. Summer passed and soon enough winter came. The Grasshopper had no food and found herself starving, while she saw the Ants feasting on the corn and grains they had collected all summer. It was only then that the Grasshopper understood that it is best to think about tomorrow, today.

(Æsop. Fables, retold by Joseph Jacobs. Vol. XVII, Part 1. The Harvard Classics. New York: P.F. Collier & Son, 1909–14; Bartleby.com, 2001, www.bartleby.com/17/1/)

2: Laura's modern retelling

Ann knew life as an administrative assistant wasn't glamorous, but she liked her job, worked hard, and saved her salary. Her apartment was modest but pleasant. Ann always thought of herself as having enough, except when she had lunch with Suzen, an old friend from college. Suzen was a derivatives trader and loved living the high life. She went out every night to the swankiest restaurants, her house was huge, her car was fast and sexy, and her clothes were the best. Everything Suzen did was designed to impress.

Whenever these two met for lunch, Suzen would say to Ann, "Live a little! Come on, you're always telling me you need to be careful. What fun is that?" Ann would smile and sip her drink while Suzen slugged back her second or third. "I just want to make sure I have enough, just in case," Ann would say. Suzen would shrug and tell Ann about her latest exotic vacation or the designer shoes she was wearing. Usually, this didn't bother Ann; she just listened to her old friend and thought that, while Suzen had a very exciting life, she liked her security and her home and knowing that she was safe, just in case.

Things stayed that way for years. Ann was promoted to office manager, but didn't change the way she lived. Suzen stayed in derivatives, making more money and spending it as fast as she earned it.

Then the housing bubble burst, taking with it the stock markets and derivatives trading. No one trusted derivatives anymore.

At first, Suzen pretended nothing was wrong. She kept buying Manolo Blahnik shoes and Gucci handbags. But she drank more at lunch and talked more about the vacations she wanted to take and less about the vacations she had taken. Then the lunches became less frequent. One day, Ann realized it had been many months since she had heard from Suzen, so she left her a voicemail, then later a second voicemail, and much later a third.

Finally, Suzen called back and left a message on Ann's home voicemail during the day when Ann was at work. "Yeah, I'm looking for work now. I have a part-time job at Starbucks, and I'm thinking about moving back in with my parents. I just don't have anything, I don't know where all that money went. I'd love to go out to lunch sometime, but I can't really afford it. Would you mind buying? I'd love to know how you're doing and hear about anything you've been up to. Gimme a call. See ya."

When Ann listened to the message, she thought about all those times when Suzen hadn't picked up the tab for lunch, about how she had laughed at Ann's frugality so she could retire someday, and how Ann had hidden her discount shoes so Suzen wouldn't see them. She deleted the message. ■

Remember that the story really lives in the minds of the listeners. As the storyteller, you can't include every single detail or motivation, even if you wanted to. This means that you must rely on the audience to interpret some of the elements in the story for themselves and therefore you must craft the story to help them do just that (see Figure 2.6).

The positive side of this is that the more the audience draws on their own lives and experiences, the more the story becomes their own. In the process, it elicits other shared stories, building connections.

On the other hand, when you and the audience bring different cultural assumptions to a story, it opens up opportunities for misunderstanding. Or opportunities for distraction, as the audience veers away from the point you want to make.

So, a story is more than just a transfer of information. It's an active mechanism for communicating events, communicating contextual information, and for developing connections between people.

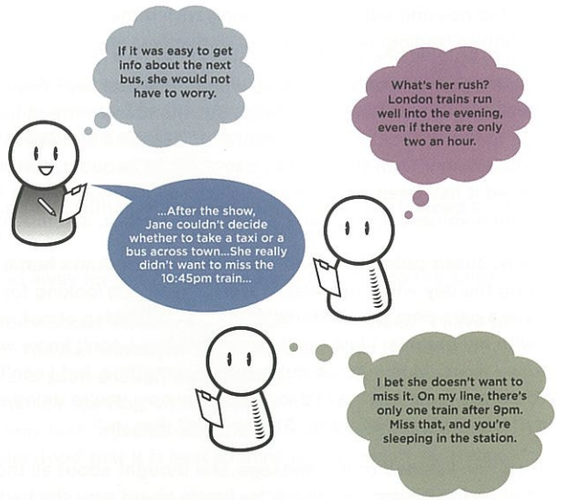

FIGURE 2.6
We fill in details about a story from our own culture and experiences.

This active role is what makes stories so useful in user experience design. One of the hardest parts of your work is understanding other people—people who may have different motivations and goals than your own. All of the user research and analytics techniques are a way to bridge that gap. Stories are not only a good way to learn about users, but also a good way to share what you have learned with your colleagues (and anyone else who has a stake in your work).

Stories have many roles in user experience design

Some of the most important roles that stories can play in a user experience design process are the following:

- They explain.
- They engage the imagination.

- They spark new ideas.
- They create a shared understanding.
- They persuade.

Stories explain

Most stories offer a description of events—a narrative. They place a set of actions into a time and place, arranging them into a sequence.

> When she was on her way to the store, she...

User experience stories often focus on explaining those events. They can describe behavior and emotional attitudes, showing how the people in the stories react to the events.

> Every time he tried to enter the 26-digit code, he got a message that the two fields did not match. Every time it happened, he got a little angrier, and hit the keyboard a little harder...and typed the code a little less accurately. Finally....

They can also add context to actions, providing an explanation for motivation or the goals driving the behavior.

> She wanted to get to Charleston for her cousin's wedding, but was on a tight budget. As she looked for the cheapest way to travel, she visited site after site: big travel sites, airlines, budget travel sites, auctions, trains, even car rentals. It was hard to compare her options because none of them gave her the full cost with all the expenses added up.

Placing a *character* in a *context* and communicating not just the *events*, but also using the *imagery* of the sensory experience is what differentiates a story from other techniques for modeling interaction, like flow charts and use cases. Some of the best storytellers are people who can present a collection of rules or facts as a story that you can easily remember. For example, they can illustrate the importance of guidelines for good design and usability by revealing what can happen when you ignore them.

This is not just about being entertaining. A good story weaves together causes and effects in a narrative so you can best remember them. It captures context and tacit knowledge and does so more efficiently than any other form of communication.

Stories engage the imagination

Stories engage the imagination of the listener, help the listener make intuitive leaps that surpass linear logic, and evoke new ideas. They rely on the way listeners create mental images, because they fill in the gaps and complete the images to fully create the story.

KEVIN'S STORY ABOUT TOKYO

I'm walking around a particularly busy and noisy part of Tokyo, with dense crowds and music playing, and I see a sign pointing around a corner that seems to indicate that there's a shrine down there.

So I turn right and walk down the cross street. As I walk, the air seems to change, because it gets quieter and quieter the farther I walk. The shrine is only a short block away from the main street with all its noise and crowds, but by the time I get to the shrine, it's quiet. It's peaceful. It's like there's a force field of peace surrounding this shrine.

I walk into this shrine, start walking through it on wide wooden floorboards, and it's so quiet. There are other people there walking by me, with me, and around me, but everyone is quiet. These people walked through the same frenetic noise that I walked through to get there, but everyone is quiet and respectful as we walk through this beautiful building.

I make my way to the center of the building where there is this Zen garden. I'm compelled to sit down on the edge and be with the huge rock in the middle of beautifully combed pebbles. I sit and let my eyes follow the path of the pebbles. I can hear my breathing. I can hear my heartbeat. I can hear my thoughts. All I can do in the middle of this patch of tranquility, in the middle of this gigantic busy, noisy metropolis, is sit and listen to the silence.

There was no place I knew—in the busy metropolis where I live—that is so easy to reach in the middle of the noise, where I could find such peace. ■

Now, let's think about what you've learned from this story. Kevin told this story to a group of UX folks at a UsabilityNJ meeting and asked them what they saw in the story. Here's how they replied:

What was the street like?

Answer: You said the street was very noisy. It was turning the corner, I think, that I could just visualize, just from the way you described it, just gradually walking to the silence, to the peace from that noisy, chaotic area. From the noise into this peaceful area Zen garden.

What color was the sign for the shrine that you saw?

Answer: It was white and the arrow was black.

Anyone else see the sign?

Answer: It had some kind of picture on it of a building, something that somehow indicated the shrine. I knew you couldn't read the words so I was picturing that there must be some kind of design on it.

What color was the shrine; did anyone see the shrine?

Answer: Bamboo.

Answer: I'm seeing a green shrine.

Answer: Stone shrine.

Answer: And small.

What color were the rocks in the Zen garden?

Answer: Gray.

Answer: Beige and brown.

Answer: Different shades of gray.

We don't know what that shrine really looked like: bamboo, stone, or green. Kevin's story omitted that detail. But each person imagined a specific place, filled in the details so they were seeing a place almost as real to them as Kevin's memory is to him.

Stories spark new ideas

Because we instinctively fill in the gaps, stories can hint at details, rather than having to spell them out. Our ability to fill in gaps makes stories a good way to spark innovation. You start by imagining a new product or a change in the environment. Then you tell a story about it, showing how people behave differently in that new situation. Here's an example:

> I live in a lovely old two-floor apartment and when I have parties, they take up both floors. What I wanted was a way for my party music to be heard all over the house, not just in the living room, and not blaring so loudly that people couldn't hear themselves think. And I didn't want to string wires all over the place. After some research, I bought an Acme Receiver. I have nice speakers next to it in the living room, of course, but all I had to do was plug in a set of satellite speakers in the kitchen, the office, and the upstairs hallway. There are no wires strung all over and no blaring music in any one place. So now when I create that perfect playlist for the evening, all my guests can enjoy it.

This story describes a solution to a problem without going into any technical detail about that solution. But when you read the story, did you imagine any parts of that solution?

- What are the possible ways for the audio signal to get from the receiver to the satellite speakers?
- How would the receiver know about the existence of the satellite speakers and is there any user setup for that?
- How would the user control the volume in the various parts of the apartment?

Steve Denning, author of several books on storytelling as effective business communication, talks about a special kind of evocative story he calls a *springboard story*. These are short stories, almost fragments, which illustrate a typical predicament. They capture the listener's attention by illustrating a familiar situation while suggesting how things might be different in the future. They are evocative because their goal is not to suggest a specific

solution, but rather to spark the imagination and get people thinking about the problem in new ways.

> "A springboard story has an impact not so much through transferring large amounts of information, but through catalyzing understanding. It can enable listeners to visualize from a story in one context what is involved in a large-scale transformation in an analogous context. It can enable them to grasp the idea as a whole not only very simply and quickly, but also in a non-threatening way. In effect, it invites them to see analogies from their own backgrounds, their own contexts, their own fields of expertise"
>
> —Stephen Denning, *The Springboard*

Springboard stories highlight one powerful aspect of the Story Triangle. When an audience is inspired to think about a solution in new ways through a story they have heard, they can take ownership of the story. Once they own the story, they can sculpt and develop it in their minds. More importantly, because they own the story, they are much more likely to take that action if the story suggests it. For instance, if the solution to their story suggests reorganizing a corporate department, they might be more likely to actually do that reorganization. And they would be doing so because it was their idea, suggested by *their own story*, which was inspired by *your springboard story*.

Stories create a shared understanding

In UX work, stories about users can bring a team together with a shared understanding of their goal. These stories can be examples of the problems a product will solve, or a vision of what life might be like with the new product.

Stories can also reveal different perspectives on an experience. The stories people choose to tell and retell say a lot about their concerns and interests.

WHAT KINDS OF STORIES DO YOU TELL?

I used to work in theatre. Like some user experience projects, a theatrical production brings together a group of specialists. When I worked on a version of *The Nutcracker Suite*, each group had its own stories.

The design and technical staff told success stories. They focused on how they had made things go right, even in the face of real problems. These stories portrayed the staff as heroes for saving the production with their knowledge and skill.

The parents and other adults who traveled with the show to supervise the young dancers told stories about times when things went wrong, lingering over the "disasters" and chaos of a live performance. These stories emphasized the excitement of being part of a live event.

The dancers were responsible for teaching the choreography to the local children for two sections of the ballet. Their stories expressed their pride in their young students, as well as emphasizing their own skill as teachers.

The stories each group told helped them create a sense of their work on the production, but their stories also revealed differences in what this shared event meant to them. ■

Stories persuade

Because they are so compelling, stories can change people's minds.

Stories can be a way to persuade others to follow your ideas. (If you are a manager or a design leader, you might want to read Steve Denning's book, *The Secret Language of Leadership*. In it he looks at stories as a management tool, just as we are looking at them here as a UX design tool.) Instead of giving orders, leaders can persuade by using stories to create a vision that others want to be part of.

Good lawyers are often good storytellers. Part of a lawyer's job is to joust using stories. Lawyers use the power of words to change the images that a story evokes in people's minds and the emotions that go along with those images.

USING ANALOGIES TO CHANGE PEOPLE'S MINDS

Michael Anderson is a First Amendment lawyer and a performing storyteller. He tells this story about how he uses story imagery and story logic to make his point.

Telling the law is about analogies. Lawyers have to retell the stories of past cases so that they sound eerily familiar, like the characters in the legend have been reincarnated here and now. With your opponents as the losers, of course.

I'm a union lawyer. I was recently arguing against a conference full of management lawyers. The issue was whether bosses have a right to force workers to attend anti-union indoctrination sessions. For 80 years, this has been an unquestioned privilege of management. Any sign of union organizing, and bam! Every worker in the plant gets marched into a mandatory anti-union "education program." When unions complain, the employers weep about their First Amendment rights. Boo-hoo, how could anyone try to silence their free speech?

I have to explain why this is wrong. So I dig up an old religion case. An evangelical Christian construction firm tells its workers they have to attend mandatory prayer sessions. It doesn't discriminate: it hires Jews and atheists just like anyone else. And the boss doesn't bribe or threaten anyone. Non-Christians are free to hold to their beliefs, but they are required at the beginning of every shift to listen to a sermon or watch a film about Jesus. In the ensuing civil rights suit, the court laughs the employer out of the courtroom. Yeah, Mr. Christian construction guy, you have a sacred right to preach the Gospel. But on your own time—you have no First Amendment right to force your workers to listen as part of their jobs.

So I ask the audience of management lawyers: "Give me a show of hands, how many people think this case was wrongly decided? Who thinks an employer has a right to force its workers to listen to sermons about Jesus?" No one raised a hand.

Then I asked, "OK, so why do union-avoidance programs have more privileges than God?" ■

Maybe you're not convinced

Before we get too far, let's take a moment to address any little voices still nagging at you. You may think that stories are an unscientific way of communicating data. Or that the people you work with won't take them seriously. Or that you don't have the talent or skill to create and tell stories.

In a field where you sometimes feel the need to sound authoritative, stories can seem, well, not *serious*. Whitney once had a proposal for a presentation on stories and personas rejected with the explanation that "We're *engineers*!" We're not talking about "Once upon a time" here. User experience stories aren't made up. They are based on data from listening and observing in formal and informal settings. They are just as valid as scientific research papers or business reports.

Nothing says that talking about user research can't be engaging, or that brainstorming has to be so formal that you can't relax and let the ideas flow. Stories are a form of communication built deeply into the human psyche. Because of this, you can use them to pack a lot of information into a small space. This makes stories an easy way to learn and an effective way to teach. In a presentation, you may take notes on the bullet points, but it's the illustrations, examples, and anecdotes that help you remember the key points or grasp a new concept on an emotional level. A few well-chosen stories might be just the thing to get everyone to put down their Blackberries and join the conversation.

Because stories are such a natural way to communicate, anyone can create and use them well. You don't have to be a great presenter, actor, or stand-up comic. Sure, storytelling can be awkward at first. Conducting a user interview or running a card sorting exercise can be difficult the first time, too. But once you start thinking about stories as a way of describing a user experience, with characters, motivation, context, and emotions driving their actions, you may find it easier than you think.

All it takes is a little practice. Just dive in and try it.

Summary

Stories are more than just a way of broadcasting information. They are interactive, and come to life in the imaginations of the audience members.

Stories are as much a part of the audience as of the storyteller. The Story Triangle describes the relationships between storyteller, story, and audience.

Stories have many roles in user experience design:

- They explain research and ideas.
- They engage the imagination and spark new ideas.
- They create a shared understanding.
- They can persuade.