

Strategic Narrative Guide [DRAFT]

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About This Guide

This guide was created by the AIUX team to share guidance on creating narrative strategies for AI-infused products. The output of narrative strategy is to create a set of strategic narratives for key goals or major objectives. Strategic narratives are commonly used tools to connect companies with users, but also to create stronger connections among team members. This stems from the power of stories, which when done correctly, create emotional connections with individuals and can motivate them to support the storyteller.

Purpose of Strategic Narratives

1. **Create a case for where the product is going, and why**- this presents a valuable opportunity to show that product management understands customers' needs and the trends in their environment. It also provides a way for customers to see where they can offer their influence to help develop products.
2. **Provide a rallying point for employees**- product development teams want to know what they are developing, why they are developing it, and for whom. Strategic narratives can help team members understand the bigger picture, and figure out their roles to support it.
3. **Support the overarching product strategy**- strategic narratives describe the journey behind the product strategy: where the product is starting from, and where it is going. This helps people see how they can currently support the strategy, and predict any changes they might need to make to continue their support.
4. **Develop and share understanding of the user**- products are developed for users, and ideally the strategic narrative depicts scenarios relevant to the audience. Crafting a strategic narrative requires the product leadership and the narrative author to understand the user. Where there are already documented personas, these can be leveraged; however, where personas are unclear, the investigations necessary to create strategic narratives can shed light on who the users might be.

Who Needs This Document?

Anybody involved in leading the creation of the customer-facing aspects of products at CA Technologies:

- Product Managers
- Product Owners
- UX Leads
- Information Engineers

Developing Strategic Narratives

Creating a strategic narrative is more than just knowing how to structure a story, though that is a necessary component of it. In order, there are 3 steps to develop successful strategic narratives:

- Foster ownership of strategic narratives.
- Create narrative structure
- Personalize the narrative

Each of these steps will be explored in detail in the sections that follow.

Foster Ownership of Strategic Narratives

Success of strategic narratives depends partly upon getting support from product leadership. That support is more likely to manifest by including them in the creation of strategic narratives. Invite product leadership to participate in 1:1 interviews where they can provide input on what they envision for the product, and what they know about users. After gathering this information and writing some narratives, validate the narratives with them, and include their feedback in any rewrites.

Create Narrative Structure

As mentioned earlier, strategic narratives describe journeys, and journeys always involve change. Without structure, however, change can be abandoned, partially obtained, or lose course. To that end, there are five questions to ask at the start of creating a strategic narrative to provide structure. These questions will be illustrated with the idea of developing a product that reports on sensitive data in a mainframe environment.

What do we need to do?

Using the product strategy as a guide, define the major objectives for the product that are part of supporting the strategy. An example of an objective might be:

“Enable reporting on changes to sensitive data on the mainframe.”

Why are we doing it?

List out the reasons for the defined objectives. These reasons can be things like customer needs:

“Shelley the auditor needs to help her employer remain compliant with GDPR requirements.”

Or industry changes :

“We expect new data security regulations to be enacted within the next year.”

Where are we now with regards to it?

Take stock of the current situation regarding where the product is at with respect to the major objectives. Answering this question is a critical step in determining how far teams will have to go to fulfill the objectives revealed by answer the first question, “What do we need to do?” It is, for all intents and purposes, a reality check for product leadership.

What do we want in the future regarding it?

Define what the end of the journey needs to look like. An example might be:

“Shelley should be able to create reports that track status of data sources, sensitive data content in data sources, changes to that content, and data source access history.”

How will we create that future?

Figure out what is needed to reach the envisioned future. For example, focusing on tracking the status of data sources could result in something like:

“Shelley needs to be able to select data sources to inspect. For each data source she inspects, the product should tell her whether that data source still exists, or if it has been deleted since the last time she was looking for sensitive data. It would be nice if there was a record of when the data source was deleted, and by who.”

Answering these five questions should help define the key ingredients of a finished strategic narrative:

- **Purpose & vision**, so the benefits to all parties involved with the product (internally and externally) are understood.
- **Current reality**, to establish a sense of urgency around engaging in the journey by clearly defining where the product is now and the challenges it will face.
- **Role of product development team members**, because the journey cannot be completed without teams, they have a right to know what is expected of them so they can take on a role that resonates with them.

Personalize the Narrative

Stories gain power when the audience is able to personally connect with them. Externally, using strategic narratives for products means connecting with customers. Internally, strategic narratives need to resonate with product development team members. The tactics for accomplishing this differ for each audience.

Connecting with Customers

The example in 'Create Narrative Structure' attempts to connect with customers by talking about Shelley the auditor, the intended user of a product to track sensitive mainframe data. Narratives that represent real tasks that customers could perform using a product present multiple opportunities to build a connection.

- Using real tasks signals that you have made an attempt to understand the work your customer does.
 - EFFECT: Creates the impression that you care about your customers, and will listen to them. Customers know they can bring you information on how they do things, and you will consider it when developing products. This is an opportunity to strengthen a relationship.
- Telling stories around real personas demonstrates how to use the product to accomplish a task.
 - EFFECT: Helps potential users create expectations for how to interact with the product, which if met during actual use, will increase trust in the product.

Resonating with Product Team Members

Although product team members are building the product and not using it, they want to know what they do matters to customers. Narratives representing real tasks for real personas show how their work can positively impact the lives of customers. This can have a motivating effect on product team members to continue producing high levels of work.

Planning Strategic Narrative Projects

Strategic narrative projects typically proceed in 4 phases.

- Phase I: Preparation
- Phase II: Interviews
- Phase III: Validation
- Phase IV: Refinement

Phase I: Preparation

Much of this phase centers around identifying and recruiting participants, creating an interview schedule, and drafting research documentation. This guide provides some sample content to help create research documentation.

- [Sample invitation email](#)
- [Sample interview guide](#)

Phase II: Interviews

This phase can be conducted remotely or in person. To gather enough information, it is recommended that sessions are scheduled to last 60 minutes. In some circumstances, product leadership might prefer to see the interview questions in advance in order to prepare insightful answers. Please share the interview questions with them, but stress that they should not share with others in product leadership. During the interview, try to bring a notetaker so you can concentrate on the conversation; or, if possible, record the interview.

NOTE: Although the bulk of information used in creating a narrative strategy will come from internal leadership, having the input of some customers at this point would provide real world insights that might otherwise be missed. However, including customers might not be possible, and that should not derail this work.

Phase III: Validation

After completing interviews, create the narratives using the insights received. To ensure that the narratives accurately reflect the goals of product leadership, share the drafts with the interview participants and request feedback on the quality of the narrative content. Also validate the narrative with customers to determine if you have accurately captured tasks and personas, and if the narrative clearly illustrates the value of the product in the scenario.

- Sample internal validation questions [COMING SOON]
- Sample external validation questions [COMING SOON]

Phase IV: Refinement

This final phase requires incorporating any open-ended feedback about the quality of the narratives into rewrites. Upon completing the edits, the narratives can be used internally and externally.

NOTE: Periodically check in with product leadership to determine if the narratives are still applicable, or if updates need to be planned.

Appendix A: Sample Invitation Email

Hello [NAME]:

The [VALUE STREAM / PRODUCT] UX Team is initiating a strategy in support of [X]. We intend this project's output to help consistently and clearly articulate [PRODUCT NAME]'s value proposition and build a more cohesive user experience for customers.

We would like you to participate in a 60-minute interview to help us kick off this initiative.

As part of this session, we are interested in hearing your thoughts on the following topics:

- [VALUE STREAM / PRODUCT]'s goals, strategies, and challenges.
- How CA presents [PRODUCT(S)].
- How CA engages with customers.
- How CA differs from its competitors in your eyes.
- Your view of the market.

We will be conducting interviews with multiple members of product leadership throughout [VALUE STREAM].

Using the insights gained from this interview process, as well as an in-depth evaluation of our product communications and our competitors' communications, the [VALUE STREAM / PRODUCT] UX Team will create a multi-part UX strategy to help CA develop products that deliver on business goals and support CA's brand.

We will work with you to schedule a convenient time to participate in an interview. If you would like to prepare for the discussion, we can provide a copy of the session questions to you.

Thank you for your time and contribution to this very important project.

Sincerely,

[TEAM MEMBER NAME]

Appendix B: Sample Interview Guide

Introductory Questions

To begin today's session, I would like to ask you some questions about your background and your role within the EDP value stream.

1. Please describe your role within the EDP value stream
 - a. How long have you been in that role?
2. Tell me about your experience before joining CA in your current role?
3. When you interact with customers, are they: Buyers, Influencers, End Users, Other?
 - a. [If Other] How would you describe this customer's role when you interact with them?

Product Questions

Now, I would like to ask you a series of questions about DCD. Some of these questions will have easy answers, or may be ones you have answered in the past. This is only to ensure that we obtain an accurate picture of the past, present, and future you envision for DCD.

1. What is the intent of DCD?
2. On a scale of 1 to 5 where 1 is "Not at All" and 5 is "Very Well", how well do you think DCD currently delivers on that intent? 1 2 3 4 5
 - a. Why did you select { X }?
3. How does DCD today compare to what it was like a year ago?
 - a. What does DCD do well today?
 - b. What does DCD not do well today?
4. What do you want DCD a year from now to be like?
 - a. Based on your answer, what do you think is achievable within a year?
 - b. Based on your answer, what do you think is not achievable within a year?
5. What are the biggest challenges you face when trying to build DCD?
6. Who are the biggest competitors to DCD?

- a. [For each competitor] How does DCD compare to { PRODUCT NAME }?
7. In your opinion, what is the biggest missed opportunity for DCD today?
 - a. What would it take to successfully pursue that opportunity?

User Questions

Next, I would like to ask you questions about DCD customers. Again, some of these questions will have easy answers, or may be ones you have answered in the past. This is only to ensure that we obtain an accurate picture of DCD users.

1. Who are the users of DCD?
 - a. [For each user] For { USER }, can you briefly describe what you understand their role involves?
 - b. [For each user] For { USER }, what benefit will they gain from DCD?
 - c. [For each user] For { USER }, on a scale of 1 to 5 where 1 is “Not at All” and 5 is “Very Well”, how well does DCD currently deliver on that benefit? 1 2 3 4 5
 - i. Why did you select { X }?
2. Are there any other users that could benefit from DCD, but that are not currently accounted for by DCD’s product strategy?
 - a. [If yes] Why do you think that is the case?
 - b. [If yes] What would make it possible to develop DCD for those users?
3. What would you like to know about DCD users that you lack knowledge of?
4. Based upon what you have learned from DCD users, what are the top 5 things they do, or want to do, with DCD?
5. For DCD users, do they experience issues DCD can resolve for them but that they are not aware DCD can help them with?
 - a. [If yes] Why do you think they are unaware DCD can help with { ISSUE }?
 - b. [If yes] What do you think could be done to make users aware of this?
6. Is there anything DCD could quickly and easily do for users that it is not currently doing?
 - a. [If yes] Why do you think DCD is not currently doing this for users?
 - b. [If yes] What would be needed to enable DCD to do this for users?

Appendix C: Sample Validation Questions

The questions shown here are meant to be asked for each narrative written as a result of a narrative strategy exercise.

Internal Validation Questions

For individual narrative stories:

What do you think about the length of { NARRATIVE NAME }? Is it:

Too short An appropriate length Too long

On a scale of 1 to 5, where 1 is “Very inaccurate” and 5 is “Very accurate”, rate the accuracy of the **scenario** depicted in { NARRATIVE NAME }. 1 2 3 4 5

On a scale of 1 to 5, where 1 is “Very poorly” and 5 is “Very well”, rate how well the scenario supports the business goals for the product. 1 2 3 4 5

For the set of narrative stories:

Based on the stories you read, please provide honest answers to the questions below.

How clearly do the narratives convey the following capabilities about DCD:

Correctly identify the type of sensitive data present in a mainframe environment.	Very unclear				Very clear
	1	2	3	4	5
Identify where organizations are not in compliance with data security regulations.	1	2	3	4	5
Enable organizations to become compliant with data security regulations.	1	2	3	4	5
Monitor the location of data sources in a mainframe environment.	1	2	3	4	5

** These capabilities can change over time, and should be represented in this matrix.

External Validation Questions

For individual narrative stories:

On a scale of 1 to 5, where 1 is “Very irrelevant” and 5 is “Very relevant”, rate the relevance of the scenario depicted in { NARRATIVE NAME }. 1 2 3 4 5

On a scale of 1 to 5, where 1 is “Very uninformative” and 5 is “Very informative”, rate how informative you found { NARRATIVE NAME } to be. 1 2 3 4 5

For the set of narrative stories:

Based on the stories you read, please provide honest answers to the questions below.

Do you think CA Technologies understands your organization’s needs? Yes No
[If No] Why not?

Do you think CA Technologies cares about your organization’s needs? Yes No
[If No] Why not?

How much would you trust DCD for the following actions:

Correctly identify the type of sensitive data present in your mainframe environment.	Not at all				Very much
	1	2	3	4	5
Identify where your organization is not in compliance with data security regulations.	1	2	3	4	5
Enable your organization to become compliant with data security regulations.	1	2	3	4	5
Monitor the location of data sources in your mainframe environment.	1	2	3	4	5

** These capabilities can change over time, and should be represented in this matrix.