

Note-Taking Matrix

TIPS: Write short, clear notes. Use quotation marks to capture specific quotes from the interviewee. Stick to facts from actual events described in the interview.

Quote (verbatim)		Need or Pain	How Often?	Impact (who/how)	Rule or Limit (constraint)	Opportunity or Idea
“... there's a huge group of people who are standing there waiting for the bus and have to sign their name and then write their signature...”		Signing up at the bus door is slow. Everyone lines up to write on one paper sheet.	Every Sunday, all year. “It's every Sunday.”	Students wait in a crowd. The supervisor on duty is busy with the sheet while the bus waits.	Sign-up must stay at the bus, on the day. A signature for the \$10 charge is needed by the business office.	A quicker way to record each student as they get on. Ms. Reid compared it to breakfast check-in.
“Not everyone writes the same equally ... A student might have two last names but only write one last name down.”		Handwritten names are hard to read or incomplete, so they are hard to match to a student account.	Every Sunday, after the trip, for every name on the sheet.	Staff type each name into Excel by hand and look up the account number. It “is difficult sometimes.”	The business office needs the student name, account number and signature before it charges \$10.	Take names from school records, not from handwriting, so they are always complete.
“So the list is sent back to the houses, but again, if it's a hard list to read, that's a challenge point.”		House staff need to know which of their students got on the bus.	Every Sunday, once the bus has left.	Heads of house and staff on duty cannot easily tell who is away or who to expect back.	Students must request leave from their head of house, and check in face-to-face when they return.	A clear list of riders, grouped by house, that house staff can read.
“... we have used a Google form. And the pain point there was that we couldn't charge the student account directly. And we had people that weren't showing up for the buses.”		Signing up in advance does not show who really rides, and it did not connect to charging.	Whenever advance sign-up was tried in the past.	Seats are held by students who do not come. Other students could miss out.	Seats are limited (two buses now). First come, first served, at the bus.	Only count a student when they actually get on the bus.
Job Stories		Connected User Stories		Acceptance Criteria		
“When (situation), I want to (motivation), so I can (outcome).”		“As a (who), I want (what), so that (why).”		“Given (context or pre-condition), when (some action is carried out), then (observable outcome).”		
A	When a crowd of students is getting on the Sunday mall shuttle, I want to quickly record who is boarding and that each one agrees to the \$10 charge, so I can get the bus away on time without missing anyone.	As a supervisor on duty at the bus, I want to scan each student's QR code as they board and have them accept the \$10 charge on the spot, so that every rider is recorded in a few seconds with no handwriting. <i>Assumes the business office accepts an on-screen confirmation. Ms. Reid is checking.</i>		Given boarding is open and Student X is not on the rider list, when X's code is scanned and X accepts the \$10 charge, then X's full name and house appear on the list and the rider count goes up by one. Given Student X is already on the list, when X's code is scanned again, then I am told X is already recorded and the rider count does not change.		
B	When the trip is over and the riders need to be charged, I want to match every rider to the right student account without re-reading or retyping names, so I can pass accurate charges to the business office quickly.	As a shuttle organizer, I want to download a charge list that shows each rider's full name, account number and acceptance of the charge, so that the business office can charge accounts without anyone retyping names.		Given 23 students were recorded on Sunday's shuttle, when I download the charge list, then the list has exactly 23 riders, each showing full name, account number, the \$10 charge and the time it was accepted. Given no students were recorded, when I download the charge list, then I am told there are no riders to charge and no list is made.		
C	When the shuttle has left campus, I want to know which students from each house are on it, so I can compare that with who asked for leave and be ready to check them in when they return.	As a head of house, I want to see today's rider list showing only students from my house, so that I know exactly who to expect at face-to-face check-in.		Given four students from my house were recorded boarding, when I open today's rider list, then I see those four names and no students from other houses. Given no students from my house boarded, when I open today's rider list, then I am told that no students from my house are on the shuttle.		