Richard Dolman

Backlog Refinement: The Rodney Dangerfield of Scrum Ceremonies
BACKLOG REFINEMENT

The Rodney Dangerfield of Scrum ceremonies
Have you ever been in a Sprint Planning session and realize the team doesn’t have enough understanding of the product backlog items (PBIs) to properly plan the Sprint?

Does your team feel like they don’t have time to “waste” elaborating PBIs, learning about Acceptance Criteria, or collaboratively estimating as a team?

Has someone mandated it’s “too expensive” or “inefficient” to bring the whole team together regularly or that just one or two “leads” should review and estimate PBIs for the entire team?
We’re having a dinner party for 42 of our closest agile friends and their “+1”s.

I need help with:

- Planning the event and the venue
- Planning the menu and all the food/beverage service
- Preparing everything and setting up for the event
- Hosting the event
We’re having a dinner party for 42 of our closest agile friends and their “+1s.” I need help with:

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- Planning the menu and all the food/beverage service
- Preparing everything and setting up for the event
- Hosting the event

OK, so what if we have fun!

As a ‘User’, I want to host a Dinner Party, so that we have fun!

end of the month!

Sorry… Not this time!

OH! … and it’s scheduled for the event

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Focus should be on **collaborative discovery**...  

- We need to **add**, **remove** and **prioritize** items...  
- We need to **estimate/size** items...  
- We need to **elaborate**, **decompose** or **visualize** items...  

...and gaining enough understanding of the requirements to prepare for Sprint planning.
Are we actively collaborating?
...Or just sitting in a room with one person talking?

while others are disengaged...
Refinement Concepts and Techniques

DEEP

Visualization

Definition of Ready (DoR)

Acceptance Criteria

Spikes

Story Writing

Relative Estimation (Sizing): Planning Poker, Affinity...

Elaboration / Decomposition (Splitting)

INVEST
How visible is your Backlog?

Do you have a **Definition of Ready (DoR)** that everyone agrees to and can see?
Is your Backlog DEEP?

D = Detailed Appropriately

E = Emergent

E = Estimated / Estimable

P = Prioritized
Have context (frame of reference)

Are we still aligned on our Vision?

Where are we within our Roadmap, Release or MVP?

What Risks do we need to address next?

Do we have Feedback from our last demo?
What Visuals do we have?

**Persona or Empathy Map**

**Story Map**

**Architecture**

**Wireframes**

What visuals do your team create / use as part of backlog refinement?
What makes a good Story?

- **Defined Role(s)**
  
- **Core Requirement**
  
- **Value/Justification**

As a <user role>/ “who”,

I need to <action/result>/ “what”,

so that <benefit>/ “why”.

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What makes a good Story?

Say it with me...
<table>
<thead>
<tr>
<th><strong>Splitting Patterns</strong></th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th><strong>Workflow pattern</strong></th>
<th>As a content manager, I can publish content to the corporate website.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>...I can publish content directly to the corporate website.</td>
</tr>
<tr>
<td></td>
<td>...I can publish content with editor review.</td>
</tr>
<tr>
<td></td>
<td>...I can publish content with legal review.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Business Rule Variations</strong></th>
<th>As a user, I can search for flights with flexible dates.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>...as “n days between x and y.”</td>
</tr>
<tr>
<td></td>
<td>...as “a weekend in December.”</td>
</tr>
<tr>
<td></td>
<td>...as “± n days of x and y.”</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Major Effort</strong></th>
<th>As a user, I can pay for my flight with Credit Card or PayPal.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>...I can pay with one credit card type (VISA only).</td>
</tr>
<tr>
<td></td>
<td>...I can pay with multiple card types (VISA, MC,AMEX).</td>
</tr>
<tr>
<td></td>
<td>...I can pay with PayPal.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Simple / Complex</strong></th>
<th>As a user, I can search for flights between two destinations.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>...specifying a max number of stops.</td>
</tr>
<tr>
<td></td>
<td>...including nearby airports.</td>
</tr>
<tr>
<td></td>
<td>...using flexible dates.</td>
</tr>
<tr>
<td></td>
<td>...etc.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Variations in Data</strong></th>
<th>As a content manager, I need to create brand-specific and geo-specific web content.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>...by Brand category</td>
</tr>
<tr>
<td></td>
<td>...in English</td>
</tr>
<tr>
<td></td>
<td>...in German</td>
</tr>
<tr>
<td></td>
<td>...etc.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Operations (e.g. CRUD)</strong></th>
<th>As a user, I can manage my account.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>...I can Create an account.</td>
</tr>
<tr>
<td></td>
<td>...I can Read/Retrieve my account settings.</td>
</tr>
<tr>
<td></td>
<td>...I can Update my account.</td>
</tr>
<tr>
<td></td>
<td>...I can Delete or cancel my account.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Defer Performance</strong></th>
<th>As a user, I can search for flights between two destinations.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>...(slow - just get it done, show a “searching” animation).</td>
</tr>
<tr>
<td></td>
<td>...(in under 5 seconds).</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Break Out a Spike</strong></th>
<th>As a user, I can pay by credit card.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Investigate and <strong>prototype</strong> how to interface with new credit card processing system.</td>
</tr>
<tr>
<td></td>
<td>... then implement credit card processing (as one or more stories).</td>
</tr>
</tbody>
</table>
**INVEST in good Stories**

<table>
<thead>
<tr>
<th>I</th>
<th>INDEPENDENT</th>
</tr>
</thead>
<tbody>
<tr>
<td>N</td>
<td>NEGOTIABLE</td>
</tr>
<tr>
<td>V</td>
<td>VALUABLE</td>
</tr>
<tr>
<td>E</td>
<td>ESTIMABLE</td>
</tr>
<tr>
<td>S</td>
<td>SMALL</td>
</tr>
<tr>
<td>T</td>
<td>TESTABLE</td>
</tr>
</tbody>
</table>

- Can we deliver an independent increment of value?
- Can we limit dependencies?
- Has it been, or can it be, negotiated?
- It shouldn’t be too prescriptive in terms of ‘how’.
- The story needs to be valuable to the customer.
- If we can’t define the value, why are we doing it?
- We understand it well enough to estimate it.
- The estimate aligns to our norms for planning.
- It needs to be “small” enough to be delivered in a single Sprint.
- Smaller Stories promote faster feedback.
- We understand it well enough that we can write a test for it.
- We have acceptance criteria that helps set boundaries for ‘done’.

*Bill Wake*
What about Estimating?

Relative sizing with T-shirt sizes

- 2 pts: Small
- 5 pts: Medium
- 8 pts: Large
- 13 pts: XL

- Story D
- Story A
- Story B
- Epic J
- Story C
- Story E
- Story F
- Story H

← Smaller scope → Larger scope

#NoEstimates?
Prioritizing = Negotiation

Saying “No”
Handing off requirements doesn’t work

It just creates Waste

and compromises Quality!
Collaborative Discovery = Collective Ownership

Don’t let remote/distributed teams be an impediment
Now, about that Dinner Party...

Now...

Have a conversation.

Collaborate with your table mates to practice some of these techniques.

Refine the “Dinner Party” EPICs...
Recap of Concepts and Techniques

- DEEP
- Visualization
- Definition of Ready (DoR)
- Acceptance Criteria
- Spikes
- Relative Estimation (Sizing): Planning Poker, Affinity...
- Elaboration / Decomposition (Splitting)

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Closing

So what?
Thank You!

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