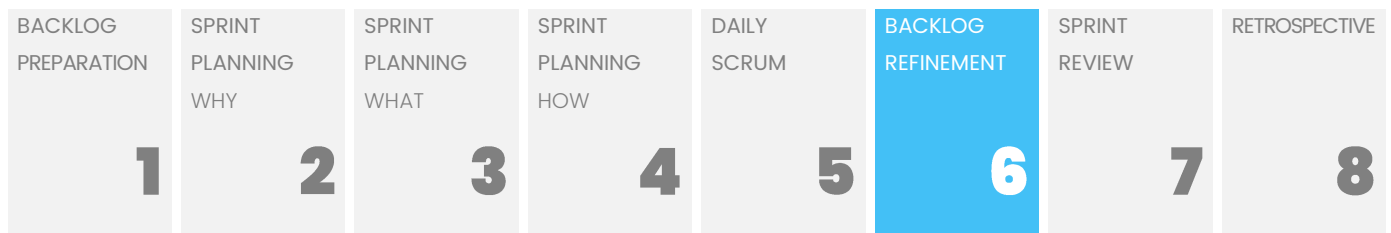




BACKLOG REFINEMENT

Adding detail and estimates to Backlog items before they're considered at Sprint Planning.

BACKLOG REFINEMENT

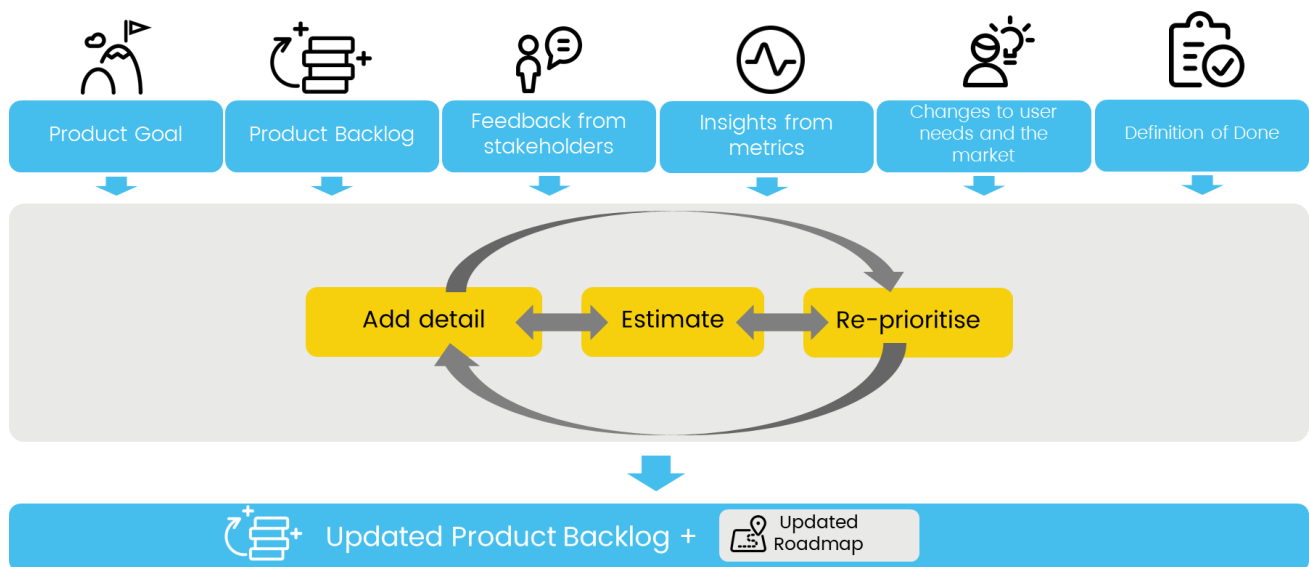


Backlog Refinement is a critical part of good practice in Scrum. Refining the Product Backlog ensures that the Scrum Team has sufficiently defined Product Backlog Items so that Sprint Planning runs more smoothly and without surprises. The more a team refines its Product Backlog the less time they tend to spend in Sprint Planning.

PURPOSE

Product Backlog refinement is the act of breaking down and further defining Product Backlog items into smaller more precise items. This is an ongoing activity to add details, such as a description, order, and size. Attributes often vary with the domain of work.

Time-box: Scrum Teams often spend around 10% of the Sprint engaged in Backlog Refinement activities.





WHO ATTENDS?

Role

Scrum Team – Product Owner, Scrum Master, Developers (people in the team developing the product)

Subject Matter Experts (SMEs) – provide insights and information as required, invited by the Product Owner and Scrum Master



KEY ARTEFACTS

- **Product Backlog** – The Product Backlog is an emergent, ordered list of what is needed to improve the product and achieve the product's goal. It is the single source of work undertaken by the Scrum Team. Product Backlog items that can be Done by the Scrum Team within one Sprint are deemed ready for selection in a Sprint Planning event.



AGENDA

Backlog Refinement has no formal agenda. Some Scrum Teams put dedicated time aside during the Sprint to refine the Product Backlog collaboratively. Some chose to do this in a workshop format with stakeholders and subject matter experts. Other teams use informal sessions between its members to do individual investigation and research on how they plan to contribute to the work to help it achieve the Definition of Done.



KEY OUTCOMES

- The Product Backlog is updated to reflect new knowledge of the scope of the item and how it adds value to customers, users, and stakeholders.
- Product Backlog items are estimated.
- Detail is added to Product Backlog items to the level needed by the Scrum Team to understand and deliver them.
- The Product Backlog meets the D.E.E.P. mnemonic.
- Granularity of the Product Backlog – PBIs are of fine granularity (top 20%), PBIs of medium-grained requirements (next 20%), and Larger that need refinement PBIs (remaining 60%).



KEY CONSIDERATIONS

- The Product Owner doesn't have to write every item in the Product Backlog, or be busy collecting "requirements" for the Product Backlog. The Product Owner isn't the team's Business Analyst. The whole Scrum Team does this collectively and collaboratively.
- While the Product Owner is responsible for the Product Backlog, and its ranking by value, Developers are responsible for refining the Product Backlog to the level that's needed for them to understand the intent, the impact, and outcome that the Product Owner is seeking from each of those items.
- Don't re-estimate items in the Product Backlog unless there is new information.
- Ensure there is approximately 2 Sprints worth of items in the Product Backlog that are ready for the next Sprint.
- Where the work a team does isn't software development, the same activities still apply. The overall goal for Backlog Refinement is to have improved clarity about the work that is coming up in the next few Sprints and what the expectations are regarding the outcome they create.



KEY APPROACHES

- Workshop with the Product Owner, stakeholders and users, what elements might contribute value to achieving the Product Goal.

- Rather than say there are “too many unknowns”, slice out the parts of a Product Backlog item that are known and estimate those.
- Use the SPIDR mnemonic to slice items into smaller pieces so they can be delivered within a single Sprint.
- Identify assumptions and run an experiment, do exploration, and/or do some high-level analysis, to validate those assumptions.
- Engage with knowledge area specialists to understand wider organisational approaches to solving technical problems, such as systems architects or UX designers.
- Top-down – Start with the Product Goal and supporting documentation like the Business Case or Business Canvas to populate the Product Backlog. Focusing on what will resolve current business issues in the next Sprint is the key.
- Bottom-up – Use lists of requirements to populate the Product Backlog and articulate the context of use using personas, storyboards, user journeys, and workflow diagrams.
- For non-software teams, identify what the target audience expects, how previously has the organisation delivered value in this area, on how to build-in quality and how to best avoid rework.
- Use Planning Poker to estimate the relative size of the Backlog items. Planning Poker estimates the size of the work needed by the whole team to get an item to meet the Definition of Done. Don't estimate tasks or individual effort to meet the Definition of Done.



COMMON OBSTACLES TO AVOID

- People outside the Scrum Team consume Backlog Refinement with discussions about solution design.
- Too much time is spent determining how Developers will tackle the Product Backlog Item over defining and clarifying what it is and any associated acceptance criteria.
- The Product Owner is forced to write every Product Backlog item.
- Big, upfront design – Traditional ways of working promote a “design everything first” approach. The team only need to understand what the Product Owner needs, and be confident that it can be delivered in a Sprint, not a fully designed solution with indicative detailed requirements. If it can't be delivered in a Sprint, consider how best to slice the work so that it does fit into a Sprint without doing the design, then test and then build in different Sprints.
- Use “vertical” slices over “horizontal”. Vertical slices always have business value. Horizontal slices contain hidden dependencies between layers of the solution.

ABOUT ZEN EX MACHINA

Zen Ex Machina (ZXM) provides independent and objective agile coaching and consulting, founded in organisational psychology, culture and change management, to help leaders succeed in their organisations. Ranging in scope from a short strategy session to full agile operating models, ZXM services connect you directly with experienced, certified agile practitioners who apply expert insight to your specific strategic and operational challenges.

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