

What do you hope to learn from this session?

Write one item per sticky note

As many sticky notes as you'd like

When done, put them on the flip chart.

**DO I HAVE TO USE
AS A I WANT SO
THAT?**

**THE ULTIMATE
QUESTION TO LIFE,
THE UNIVERSE, AND
EVERYTHING**

**HOW TO BUILD A
STRONG
REFINEMENT
APPROACH**

**AVERAGE AIR
SPEED VELOCITY OF
AN UNLADEN
SWALLOW**

Backlog Refinement: “Writing Stories” isn’t the whole story

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<https://insideproduct.co/backlog-refinement>

A little bit about me

**INDUSTRIAL
ENGINEER BY
TRAINING**

WRITER / TRAINER

UNEMPLOYABLE

**PROJ MGR / BA
ROTATION**

**FREELANCE
PRODUCT
MANAGER /
WRITER**

**WRITE TO LEARN
AND EARN**

**STARTED BUSINESS
ANALYSIS TO
LEARN IT**

**RECOVERING AGILE
COACH**

**PRACTICE TO STAY
CURRENT**

What is backlog
refinement?

What is backlog refinement

ALSO KNOWN AS:

STORYTIME

BACKLOG MANAGEMENT

BACKLOG MAINTENANCE

~~**BACKLOG GROOMING**~~

A set of **activities** that ensures your product backlog contains a set of **appropriate items** that are properly **sequenced** and contain the **necessary information** for your team to start building a **portion of the solution**

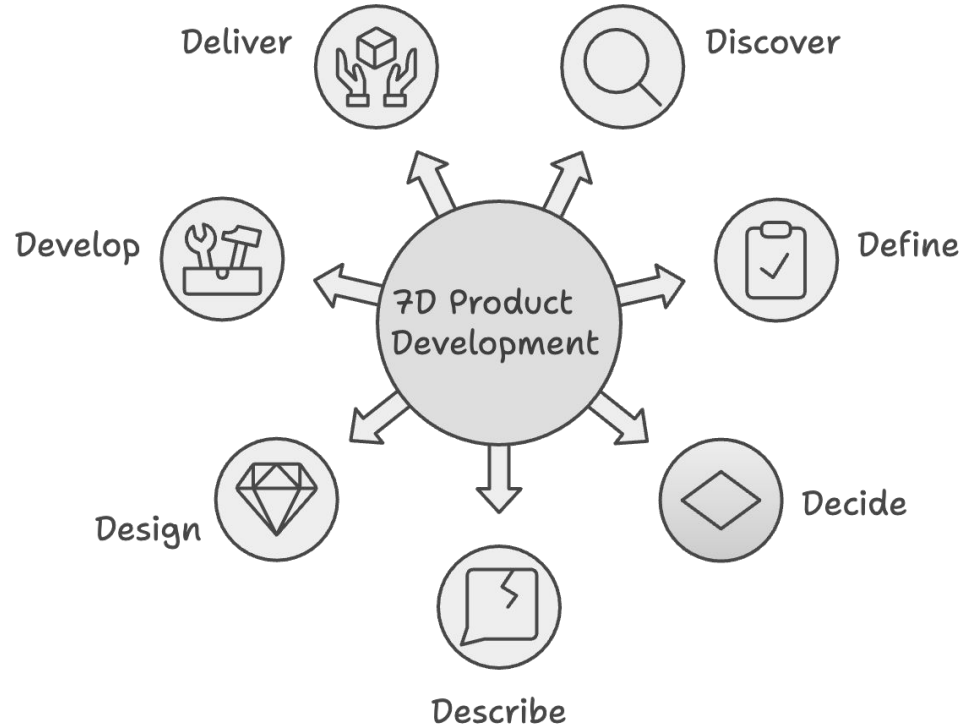
Backlog refinement includes these activities

Discover your customers
and their needs

Describe the solution

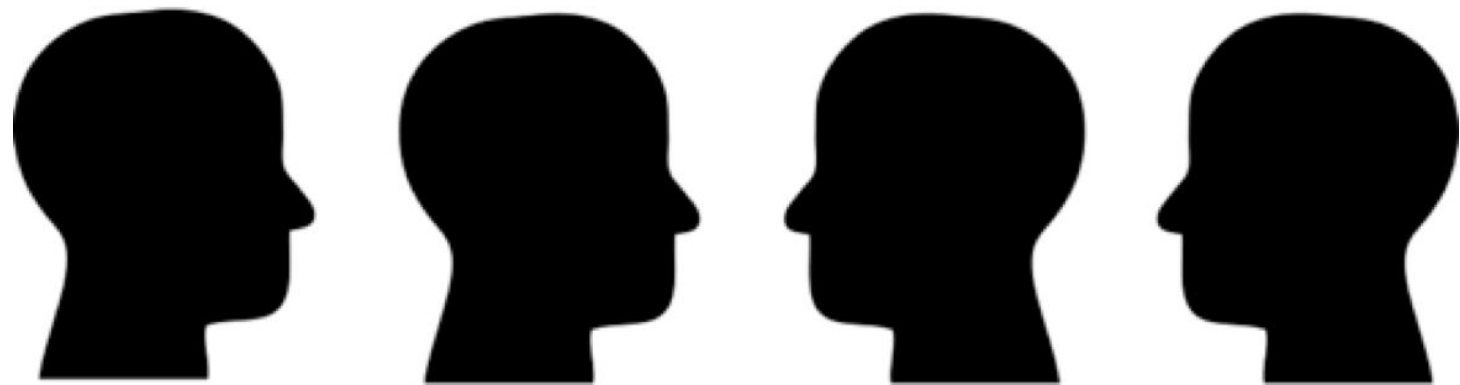
Design the experience

Make **decisions** all along
the way



Why do backlog
refinement?

Shared
Understanding



Why do Backlog Refinement

**IDENTIFY AND
ANSWER
QUESTIONS TO
EASE DELIVERY**

**DEFINE
INTERACTIONS, SET
EXPECTATIONS**

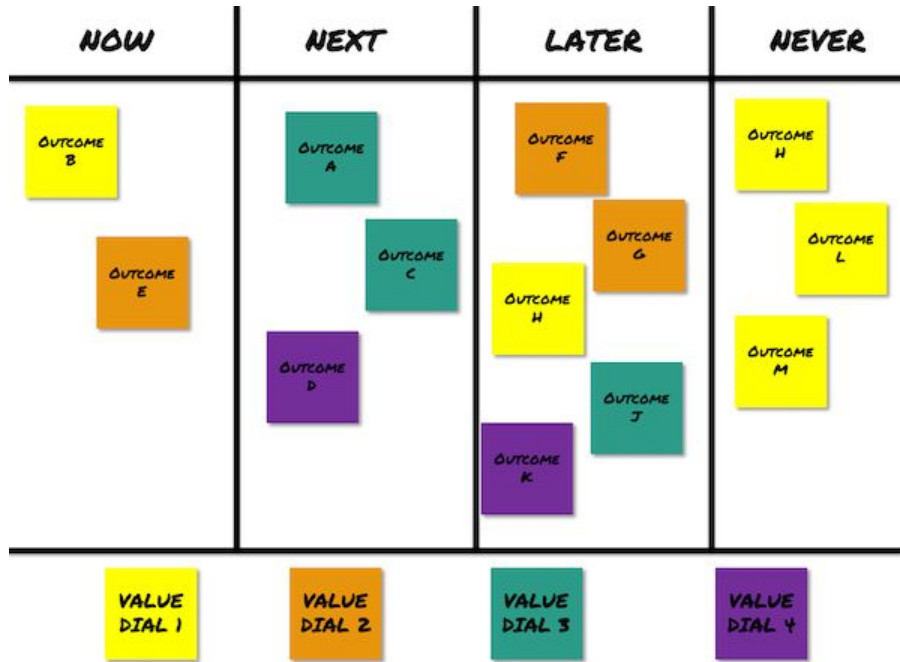
**IDENTIFY AND
DISCUSS
ASSUMPTIONS**

**GIVE TEAM A
JUMP START ON
TEST PLANNING
AND TESTING**

**PROVIDE CLEAR
PICTURE OF
BUSINESS INTENT**

Tips for effective backlog refinement

A few items, mostly big



Now:

Outcomes you're focusing on at the moment.

Next:

Outcomes you *think* you'll tackle in the near future.

Later:

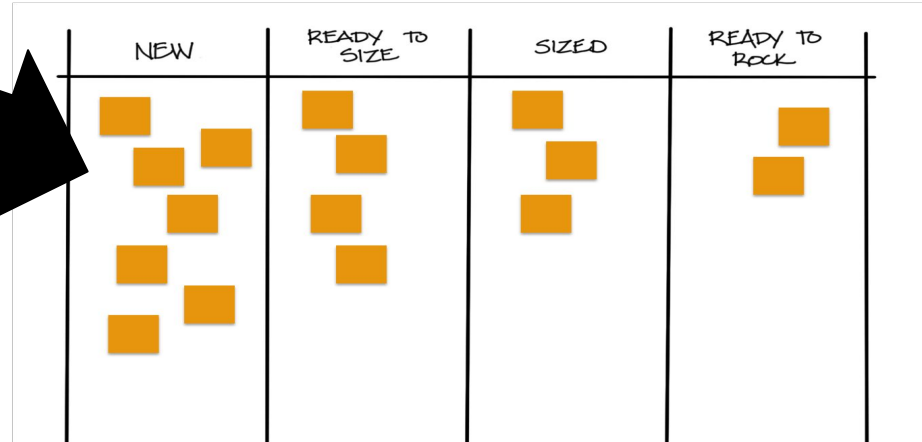
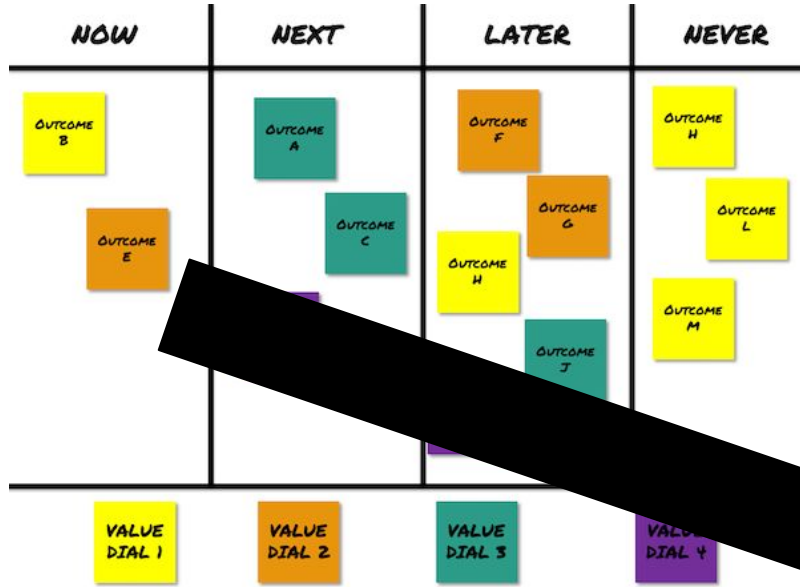
Outcomes that *might* be worth tackling at some point.

Never:

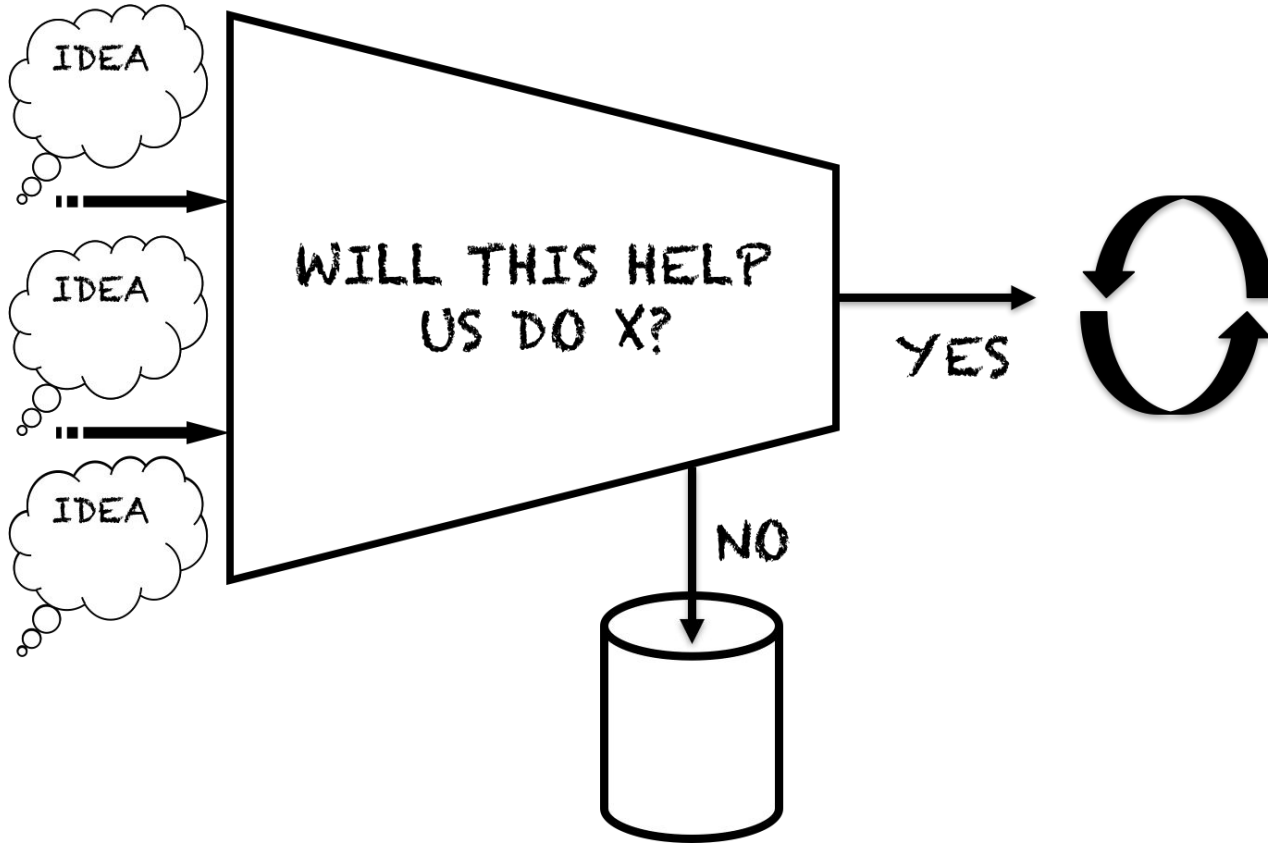
Outcomes you're not going to bother with at all

**TIE YOUR ROADMAP ITEMS TO STRATEGY
(BUT MAKE SURE YOU'RE NOT USING YOUR STRATEGY AS A BUCKET)**

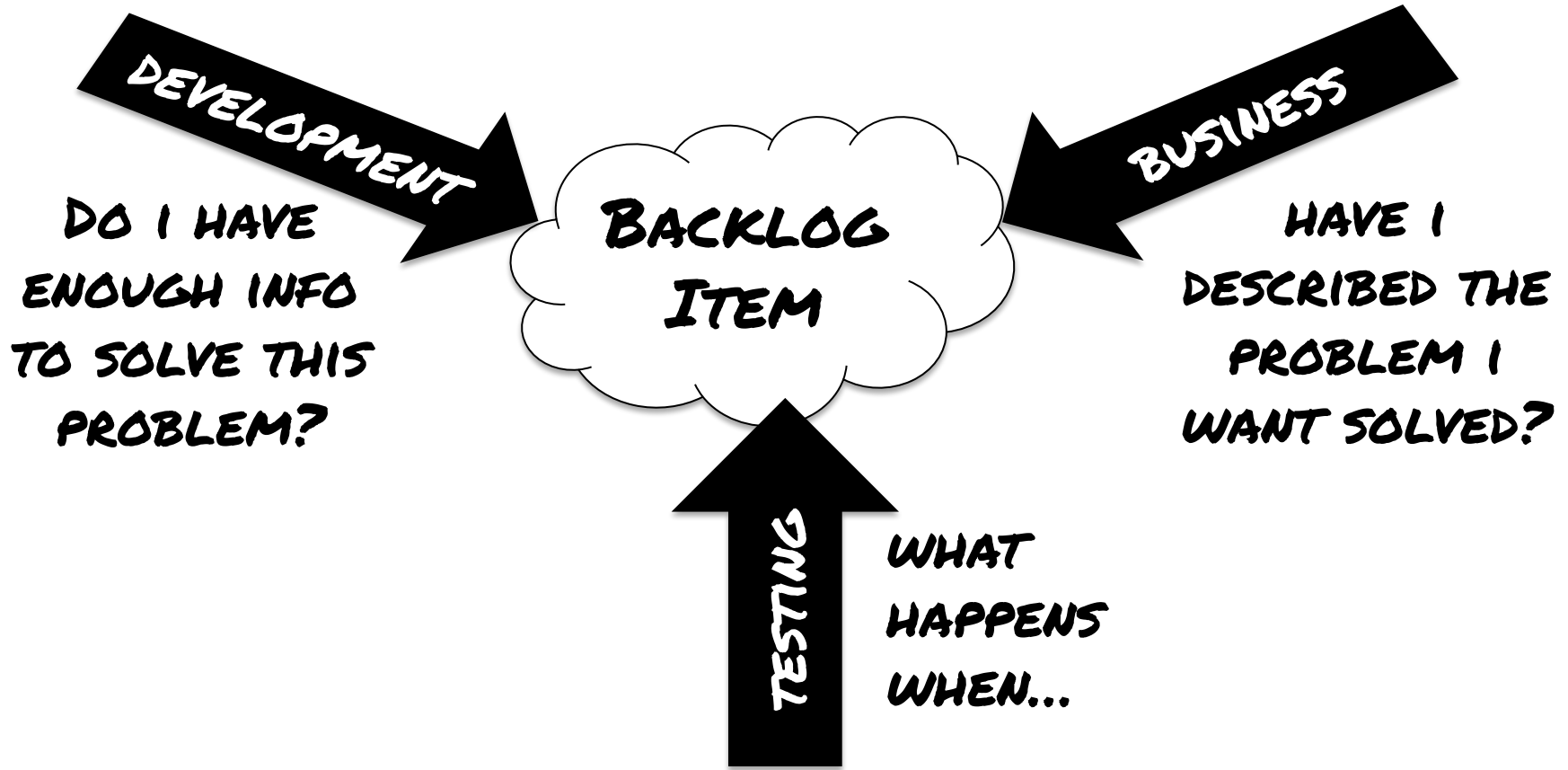
Break items down only when you need to



Prioritize on Impact



Multiple Perspectives



Get your team the information they need

SUBMIT SESSION REVIEW

ONE LINE SUMMARY*

(VISIBLE TO PRESENTER)

ADVICE TO PRESENTER*

(VISIBLE TO PRESENTER)

THIS SESSION SHOULD BE INCLUDED IN THE

- AGREE
- NEUTRAL
- DISAGREE

DISCLOSURE OF CONFLICT OF INTEREST

ADVICE TO PROGRAM TEAM

```
file | 35 lines (27 sloc) | 1.147 kb
1 Feature: Add Review
2 As a track reviewer
3 I want to add reviews
4
5 Background:
6 Given I am logged in as "Reed"
7
8 Scenario: Review a session
9 Given a session exists on my review track
10 When I add a review to that session
11 Then the review should be added to that session
12
13 Scenario: Unable to review for other tracks
14 Given "Sam" has created a session on another track
15 When I try to add a review to that session
16 Then I should not be allowed
17
18 Scenario: Unable to review my own session
19 Given I have created a session on my track
20 When I try to add a review to that session
21 Then I should not be allowed
22
23 Scenario: Unable to review sessions I'm a co-presenter on
24 Given a session exists on my review track
25 And I am the co-presenter on that session
26 When I try to add a review to that session
27 Then I should not be allowed
28
```

Add Review

in [List To Do](#)

Description [Edit](#)

As Reed the Reviewer I can add a review to a session so that I can provide Sam Feedback.

Acceptance Criteria

- Reviewers must provide a title and description for the review.
- Reviewers may indicate whether they think the session should be included in the program.
- Reviewers may provide details of any conflicts of interest they have in reviewing the session.
- Reviewers may provide comments for the review committee.
- Submitters of the reviewed session can see only the title and description of the review.

Attachments

- Add_review_examples.png**
Added a few seconds ago - [Comment](#) - [Delete](#)
[Download](#) [Remove Cover](#)
- SubmitReviewMockup.JPG**
Added 3 minutes ago - [Comment](#) - [Delete](#)
[Download](#) [Make Cover](#)
- 15-4_Acceptance_Criteria_Mind_Map.png**
Added 5 minutes ago - [Comment](#) - [Delete](#)
[Download](#) [Make Cover](#)

Actions

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Techniques to make it
happen

Definition of Ready



AN AGREEMENT ON THE "NECESSARY INFORMATION" A BACKLOG ITEM NEEDS SO YOUR TEAM CAN START BUILDING THAT PORTION OF YOUR SOLUTION

How to Create & Use a Definition of Ready

1. GET THE TEAM TOGETHER

2. GENERATE A LIST OF THINGS NICE TO KNOW ABOUT BACKLOG ITEMS

3. REVIEW THE LIST AND DETERMINE WHAT IS USEFUL AND REASONABLE

4. CONTINUE REVISING UNTIL TEAM IS COMFORTABLE WITH LIST

5. REFER TO THE DEFINITION OF READY TO DETERMINE IF AN ITEM IS READY FOR SPRINT PLANNING

Caveats and Considerations

DEFINITIONS OF
READY DIFFER
BETWEEN
TEAMS

CONVERSATION
TO CREATE IS
IMPORTANT FOR
TEAM TO SET
EXPECTATIONS

HELPS YOU
UNDERSTAND
THE EXTENT OF
ANALYSIS
NECESSARY IN
YOUR CONTEXT

SOME ASPECTS
OF DEFINITION
OF READY MAY
BE MARKED
"WHEN
APPLICABLE"

REVISIT ON A
REGULAR BASIS
AND ADJUST
WHEN NEEDED

Describing backlog Items

OVERVIEW

REVISION NEEDED

ACCEPTANCE CRITERIA

EXAMPLES

- PROVIDES CONTEXT FOR THE BACKLOG ITEM
- SHOULD EXPLAIN WHY THE BACKLOG ITEM IS NEEDED
- WHEN PERTINENT, SHOULD ALSO EXPLAIN WHO IS IMPACTED
- YOU COULD USE AS A, I WANT, SO THAT HERE, BUT YOU REALLY DON'T NEED TO.

Describing backlog Items

OVERVIEW

REVISION NEEDED

ACCEPTANCE CRITERIA

EXAMPLES

- CHANGES DRIVEN BY BACKLOG ITEM
- INCLUDE BUSINESS RULES, DATA, AND PROCESSES
- OFTEN INCLUDES LINKS TO OUTSIDE ARTIFACTS (SCREEN MOCKUPS, API SPECS, DATA DICTIONARY, PROCESS FLOWS)
- DEPTH OF TECHNICAL INFORMATION DEPENDS ON WHAT THE TEAM IS LOOKING FOR

Describing backlog Items

OVERVIEW

REVISION NEEDED

ACCEPTANCE CRITERIA

EXAMPLES

- **CONDITIONS THAT A BACKLOG ITEM MUST SATISFY TO BE ACCEPTED**
- **CAN REFERENCE FUNCTIONAL OR NON FUNCTIONAL REQUIREMENTS**
- **DEFINE THE BOUNDARY OF THE BACKLOG ITEM**
- **FOCUS ON BUSINESS INTENT**

Describing backlog Items

OVERVIEW

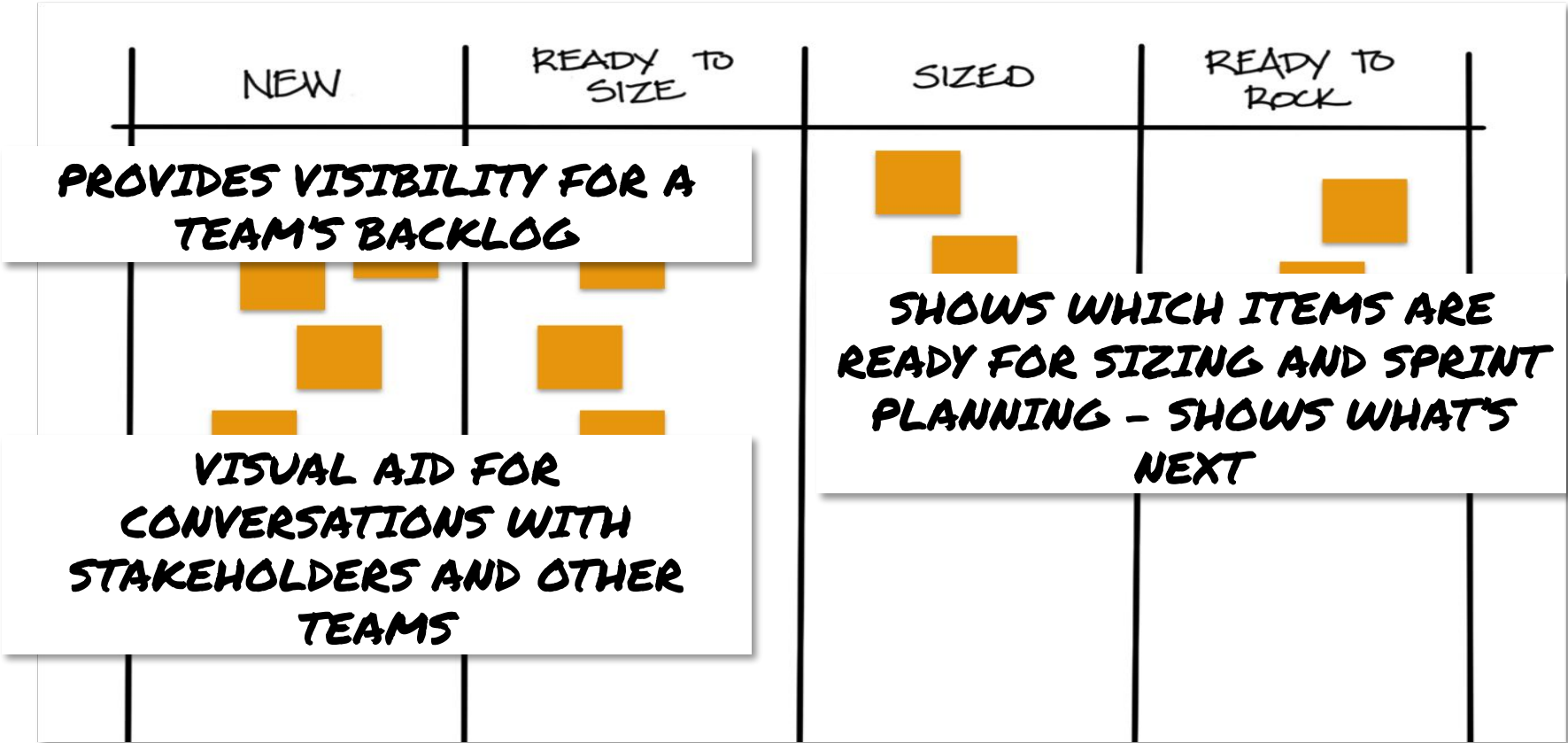
REVISION NEEDED

ACCEPTANCE CRITERIA

EXAMPLES

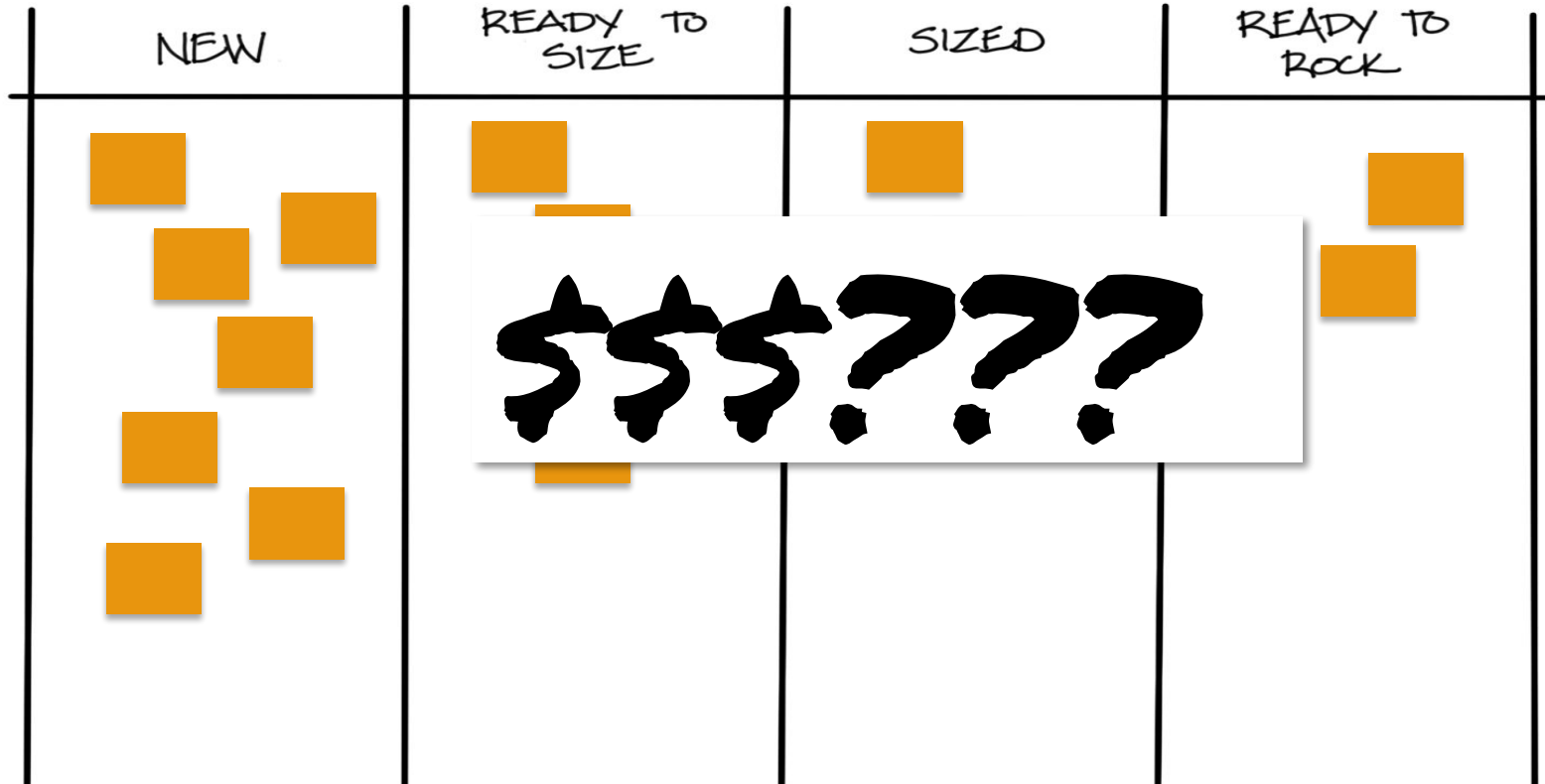
- CONCRETE DESCRIPTIONS OF THE EXPECTED BEHAVIOR OF A SOLUTION
- USES REAL-LIFE DATA
- USEFUL FOR DESCRIBING A SOLUTION
- PROVIDES GUIDANCE ON WAYS TO VALIDATE IT.
- FURTHER EXPLAINS ACCEPTANCE CRITERIA, WHEN NEEDED

Refinement Board



Create Step 1

Is it Worth It?



Create Step 2

Backlog refinement process

NEW	SIZED	READY TO ROCK
NEWLY IDENTIFIED BACKLOG ITEMS OR BACKLOG ITEMS UNDERGOING FURTHER RESEARCH	BACKLOG ITEMS THAT HAVE BEEN SIZED AND ARE READY FOR FURTHER DESCRIPTION	BACKLOG ITEMS THAT ARE READY FOR SPRINT PLANNING

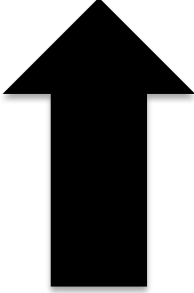
Create Step 3

Determine policies for each column

NEW	SIZED	READY TO ROCK
<p>POLICY: WHO, WHAT, WHY</p>	<p>POLICY:</p> <ul style="list-style-type: none">• WHO, WHAT, WHY• (SOME) ACCEPTANCE CRITERIA• SIZE	<p>POLICY:</p> <ul style="list-style-type: none">• WHO, WHAT, WHY• ACCEPTANCE CRITERIA• SIZE• MOCKUPS• EXAMPLES• DEPENDENCIES• STAKEHOLDERS

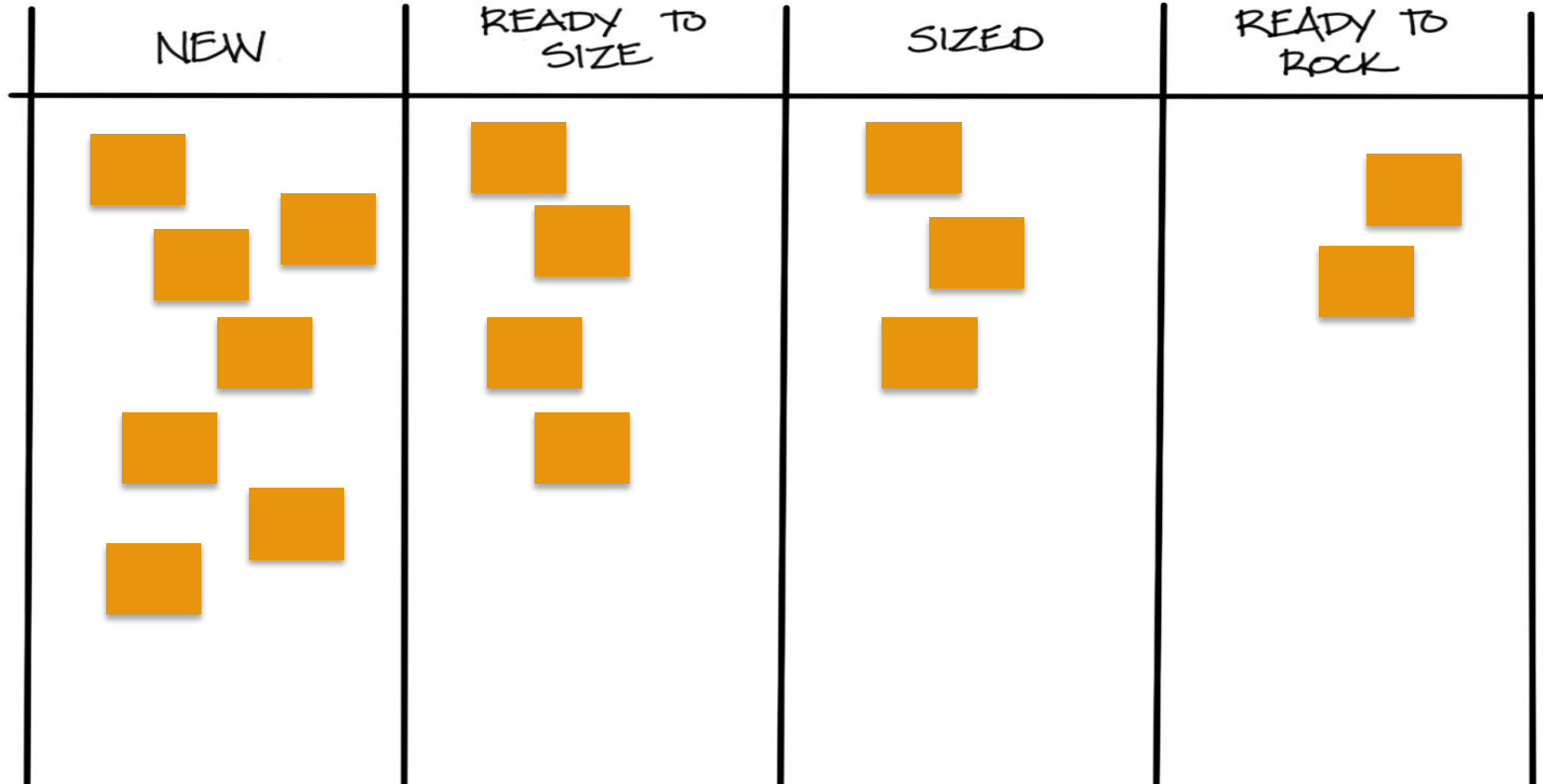
Create Step 4

Determine if you need buffers

NEW	READY TO SIZE	SIZED	READY TO ROCK
<p>POLICY: WHO, WHAT, WHY</p>	 <p>POLICY:</p> <ul style="list-style-type: none">• WHO, WHAT, WHY• (SOME) ACCEPTANCE CRITERIA	<p>POLICY:</p> <ul style="list-style-type: none">• WHO, WHAT, WHY• (SOME) ACCEPTANCE CRITERIA• SIZE	<p>POLICY:</p> <ul style="list-style-type: none">• WHO, WHAT, WHY• ACCEPTANCE CRITERIA• SIZE• MOCKUPS• EXAMPLES• DEPENDENCIES• STAKEHOLDERS

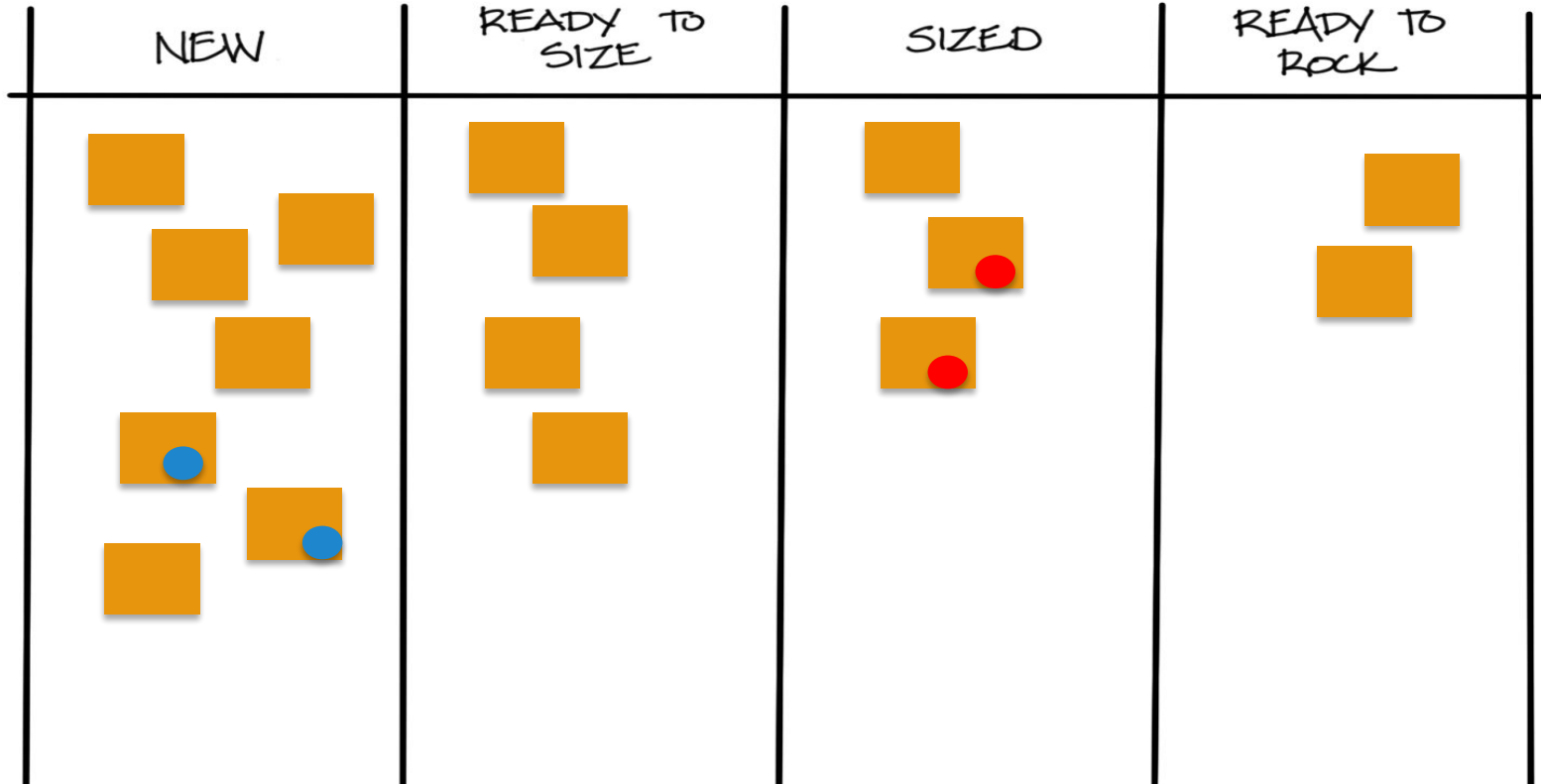
Create Step 5

Create cards for existing work



Create Step 6

Determine tokens



If you remember nothing else

A REFINEMENT
BOARD HELPS
YOU MAINTAIN A
MANAGEABLE
BACKLOG

PRIORITIZE BY
IMPACT TO KEEP
YOUR TEAM
FOCUSED ON THE
RIGHT THINGS TO
BUILD

DEFINITION OF
READY ENSURES
YOU HAVE THE
INFO YOU NEED
TO BUILD THAT
RIGHT THING.

Questions

**WHAT
QUESTIONS DO
YOU HAVE?**



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