

# Product Backlog Refinement with Structured Conversations

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**Ellen Gottesdiener**

[www.ebgconsulting.com](http://www.ebgconsulting.com)

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Ellen Gottesdiener

@ellengott

#Less2017



## Ellen Gottesdiener

CPO, Founder, CSM, CSPO, CPF

Ellen is an Agile Product Coach and CEO of EBG, focused on helping product and development communities create valuable outcomes through product agility. She is known in the agile community as an instigator and innovator for collaborative practices for agile product discovery and using skilled facilitation to enable healthy teamwork and strong organizations.

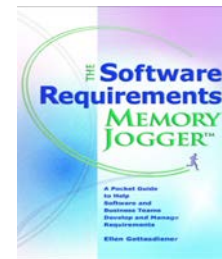
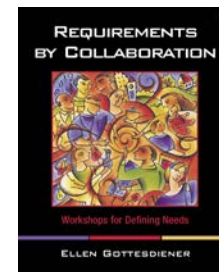


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blog: [ebgconsulting.com/blog](http://ebgconsulting.com/blog)

linkedin: [ellengottesdiener](https://www.linkedin.com/in/ellengottesdiener)

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EBG is a global leader in agile product requirements, backlog management, agile business analysis, and collaborative practices for technology products. EBG helps organizations amplify discovery to accelerate delivery.



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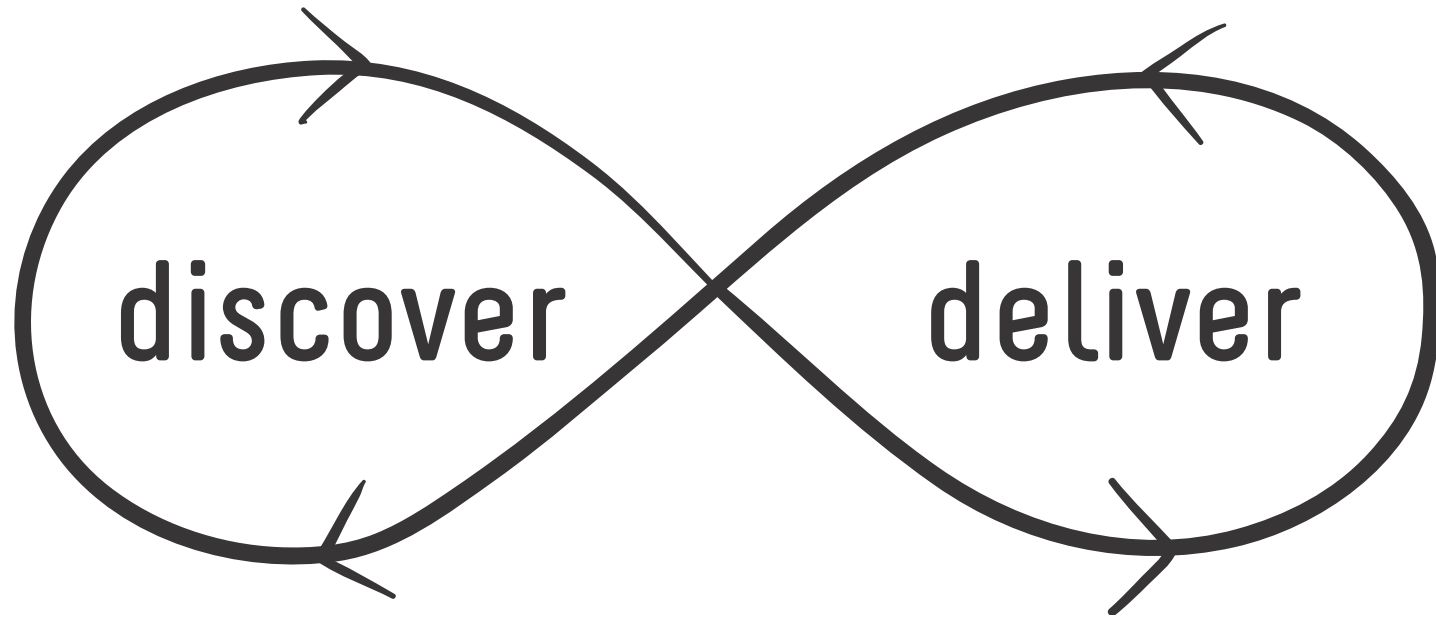
# give-aways

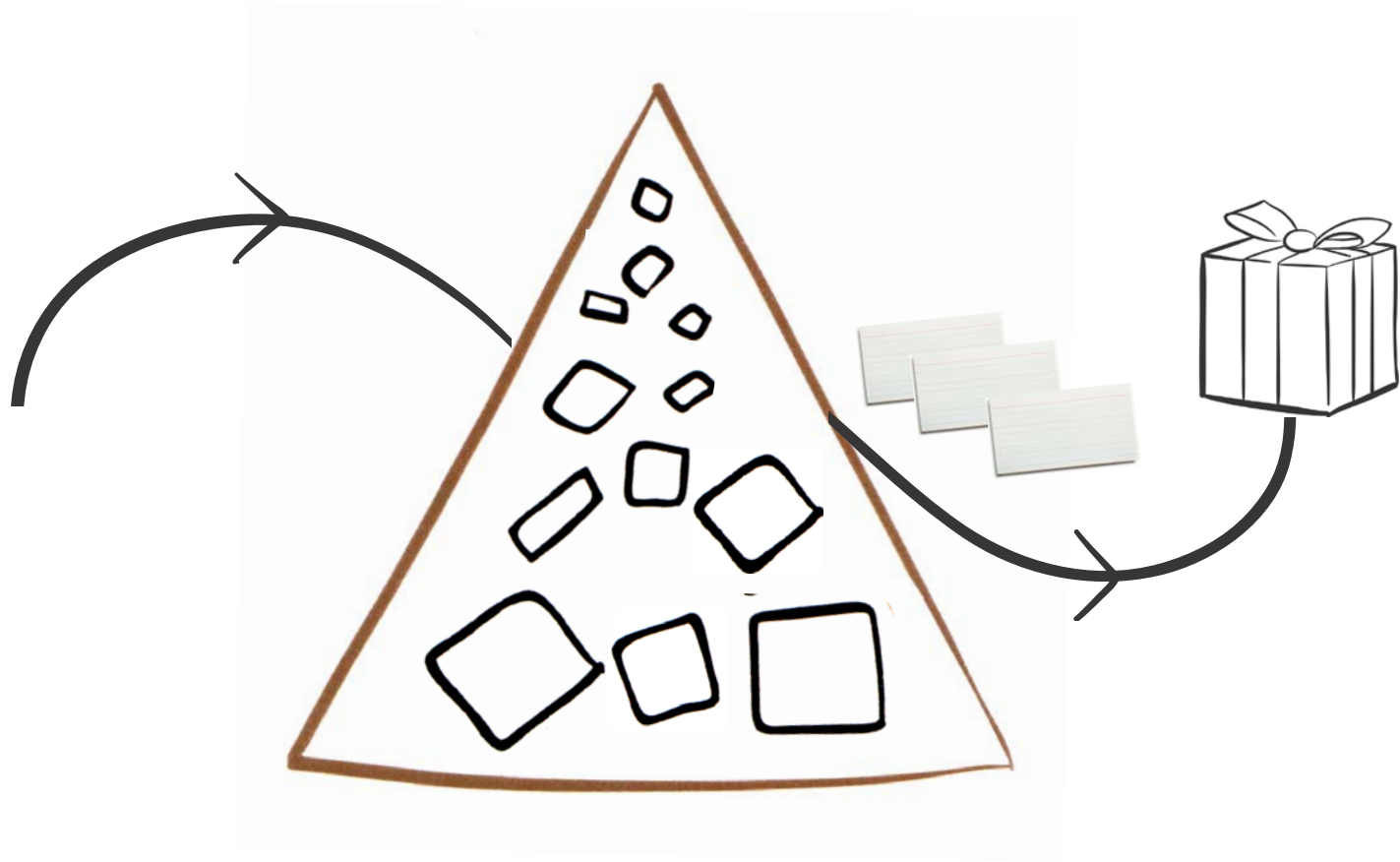


# agile goal

discover and deliver high value









# refinement

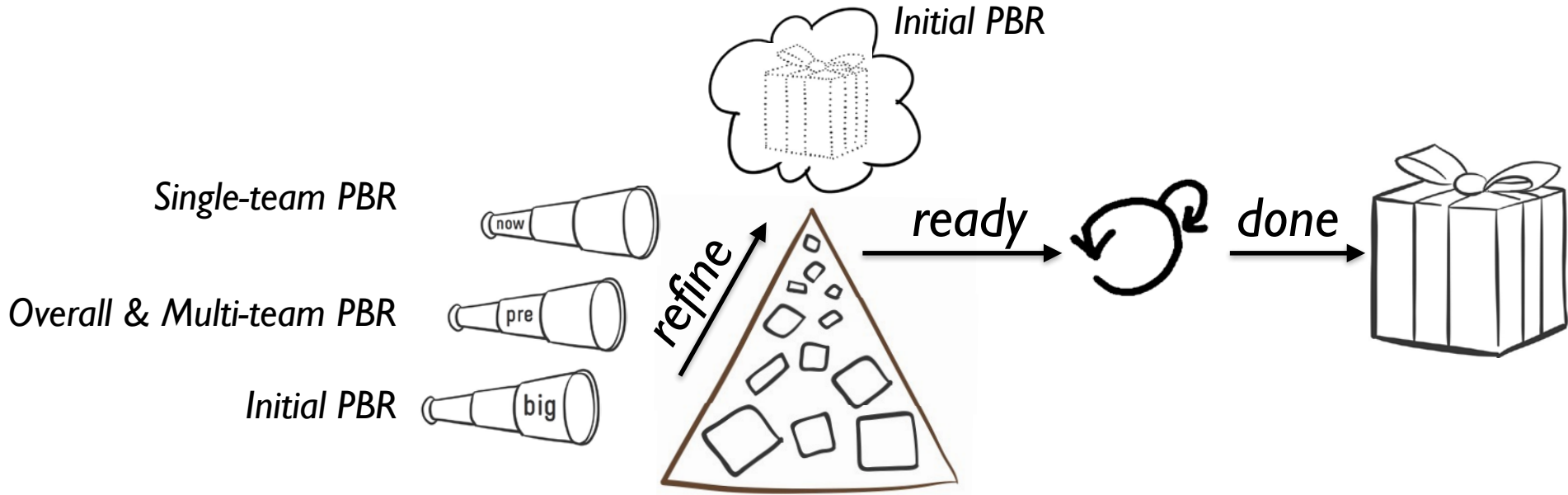
Product Backlog items that will occupy the Development Team for the upcoming Sprint are **refined** so that any one item can reasonably be “**Done**” within the Sprint time-box.

Product Backlog items that can be “**Done**” by the Development Team within one Sprint are deemed “**Ready**” for selection in a Sprint Planning.

Product Backlog items usually acquire this degree of transparency through the above described **refining** activities.

Source: Scrum Guide, 2016 (bolded added by Ellen)

# refinement: ready to get to “done”



**“done”**

**Conditions that indicate that a  
backlog item is completed,  
accepted, and potentially shippable**

**‘done’  
sample**

Backlog item (e.g., a user story) has been developed, tested,  
demo’ed AND meets all required acceptance tests

Item can be | is delivered to customer

Documentation | release notes approved

Code deployed to x server

No level x defects

Acceptance, integration tested

Product Owner ‘accepts’ it

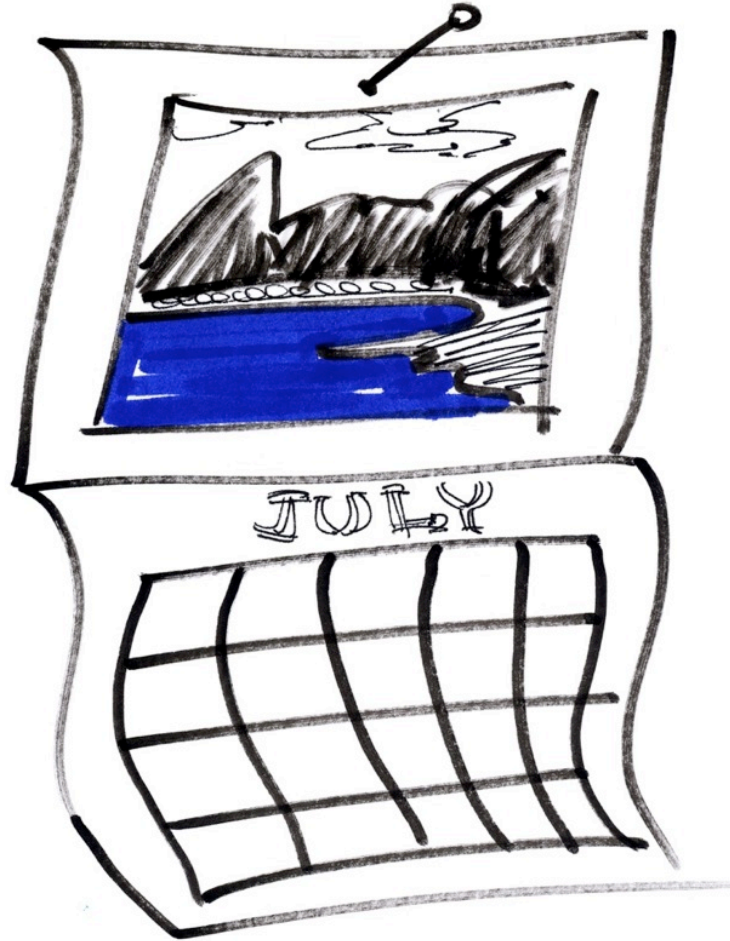


# traveling stories



**NOT ready**

# ***poor* estimates & elongated planning**



**NOT ready**

**wrong product**



**NOT ready**



# successful refinement

## Why:

Add, re-order, revise, elaborate, explore, visualize, evaluate, specify, remove backlog items

Estimate and size backlog items

LeSS: build initial backlog, identify requirements areas, build shared understanding of the *whole* product (Initial PBR)

LeSS: allocate items to requirements areas/teams (Overall PBR)

## Who:

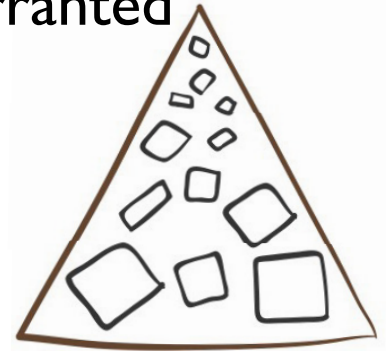
PO, APO, development team, other product partners, as warranted

## Outcome:

Highly cohesive, loosely coupled requirements areas

Lean and lumpy backlog suited for just-in-time refinement

Backlog items ready for development



# refinement (making ‘ready’) benefits

Optimize **collaboration**

Prevent **waste** (of rework, unfinished work, delays)

Enable smooth **flow**

Increases team **domain knowledge**

Can double (or more) team’s **velocity**\*

Enable getting to “**done**”

\* JCarsten Ruseng Jakobsen & Jeff Sutherland, SCRUM and CMMI - Going from Good to Great

# ready for development

*sample*

Valuable	Actionable	Feasible
Value is clearly articulated Aligned to Sprint goal ...	Story has 7 Product Dimensions with enabling specs (e.g., wire frames) Acceptance criteria are clear, unambiguous, testable Know how to demo Meets INVEST criteria ...	Team has skills, experience, resources to develop, test, & demo story Story is estimated and sized to fit Sprint ...

As a concert goer  
I want to use dining discounts  
so I can enhance my concert  
experience

# refined and ready?



User

# story w 7Ds

As a **Super Fan concert goer**  
I need to **search for**  
**concert-related dining discounts**  
so I can enhance my concert experience

Only members can search for dining discounts  
Only "active" dining discounts can be searched

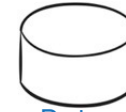
iOS, Chrome v50

Search query and result

Available 95% of time



Action



Data



Control



Quality  
Attribute



Interface

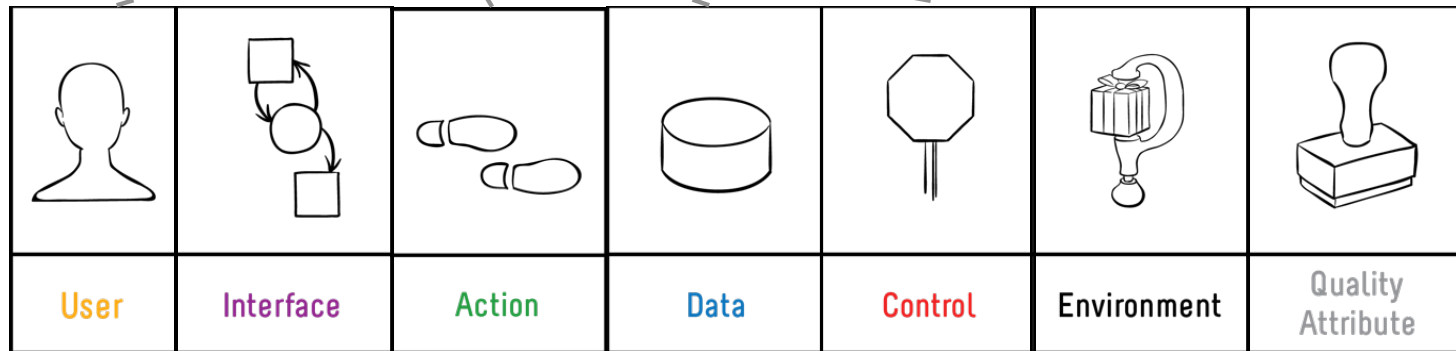


Environment

# refined and ready?

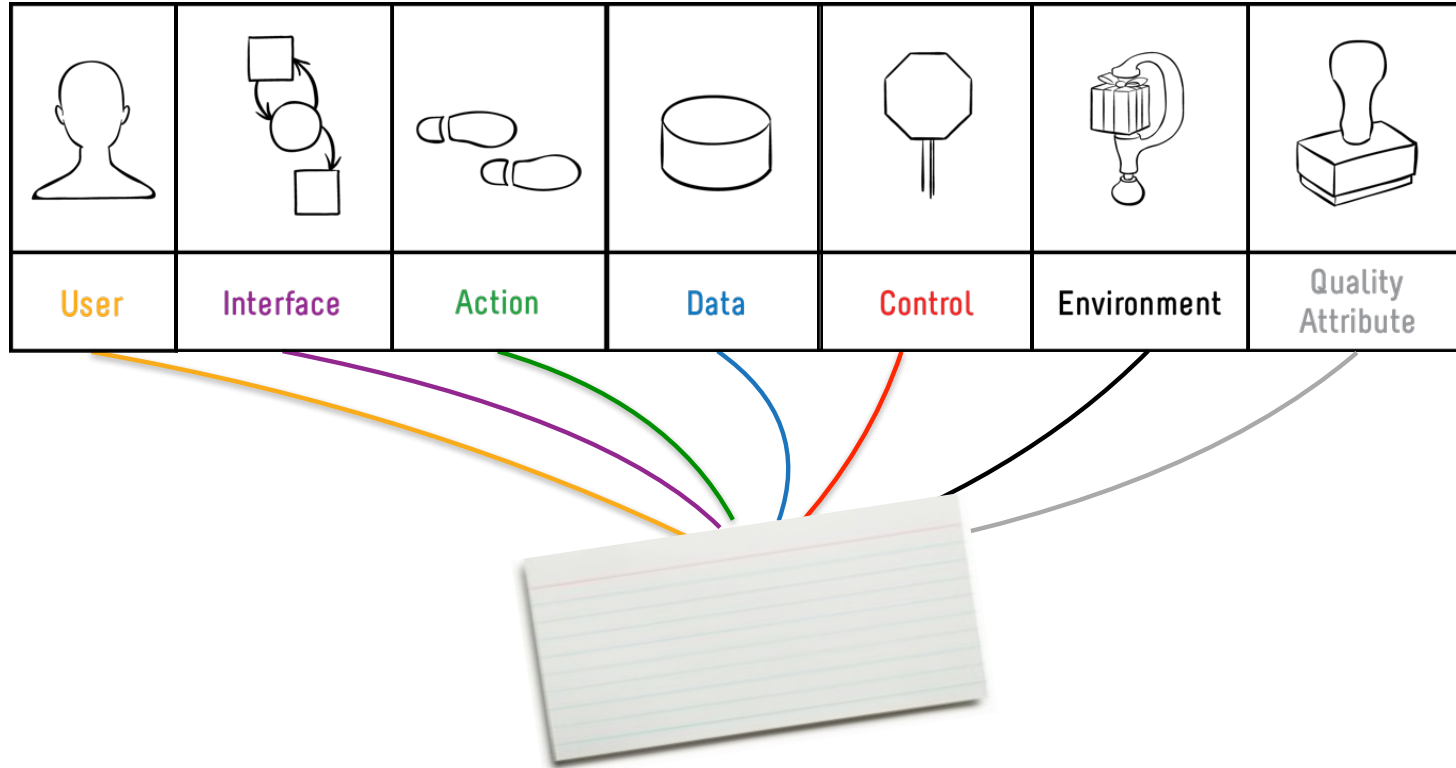
# 7 product dimensions

**functional**



**nonfunctional**

# holistic

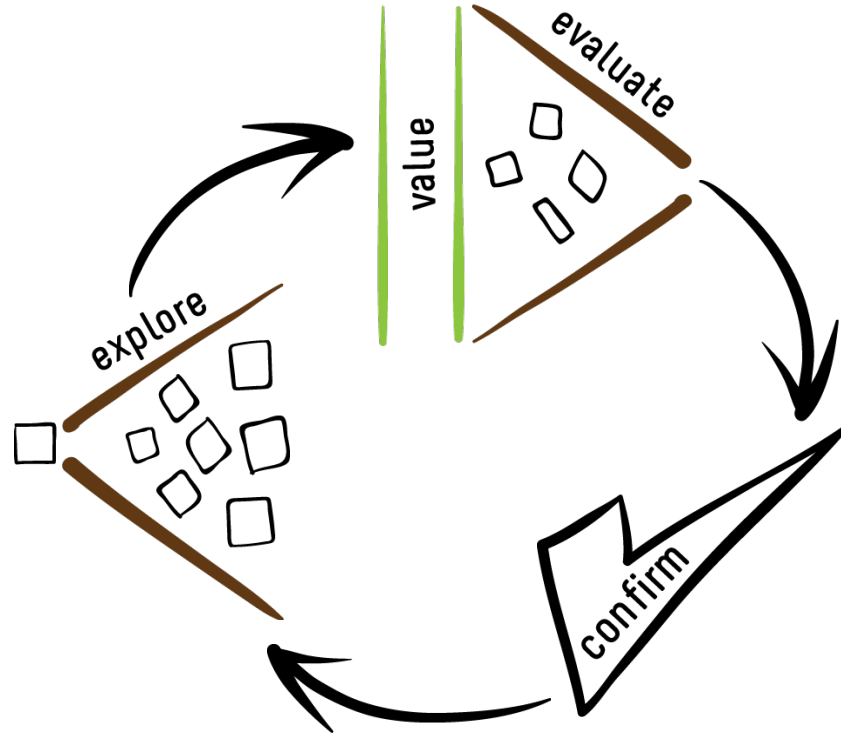


# conversation

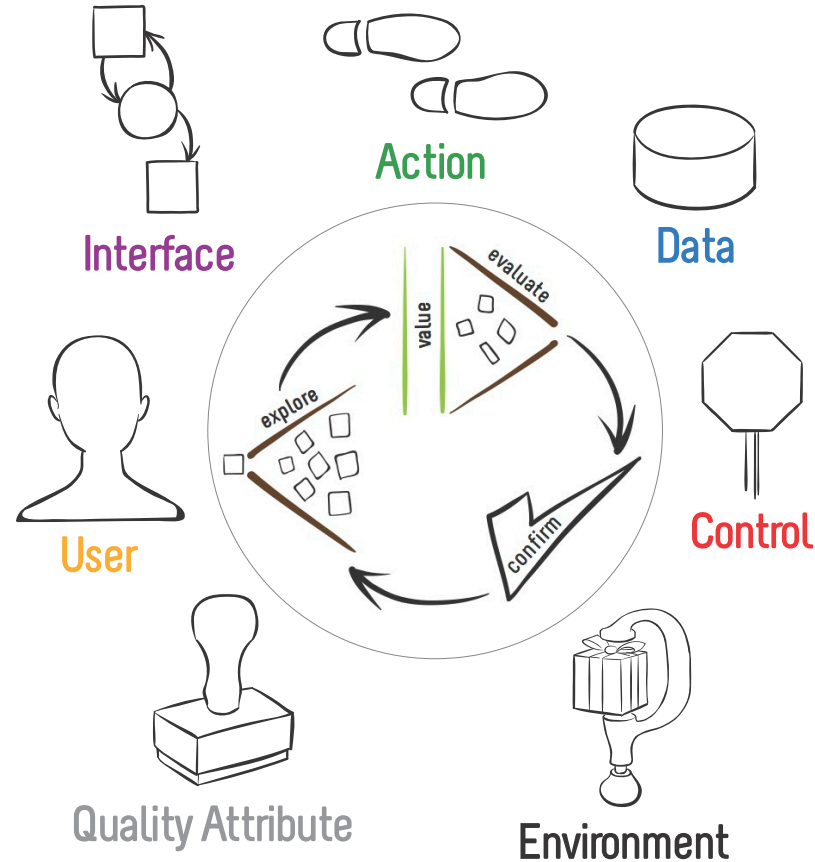






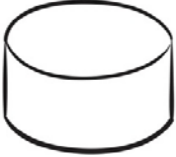
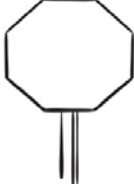



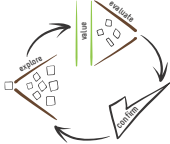
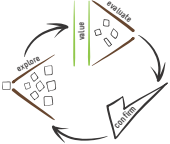
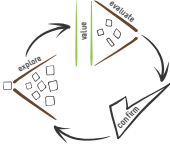
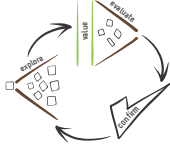
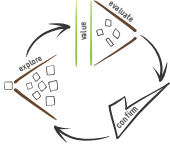
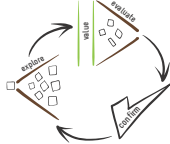
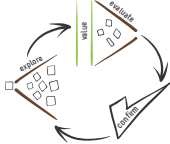
# structured conversation



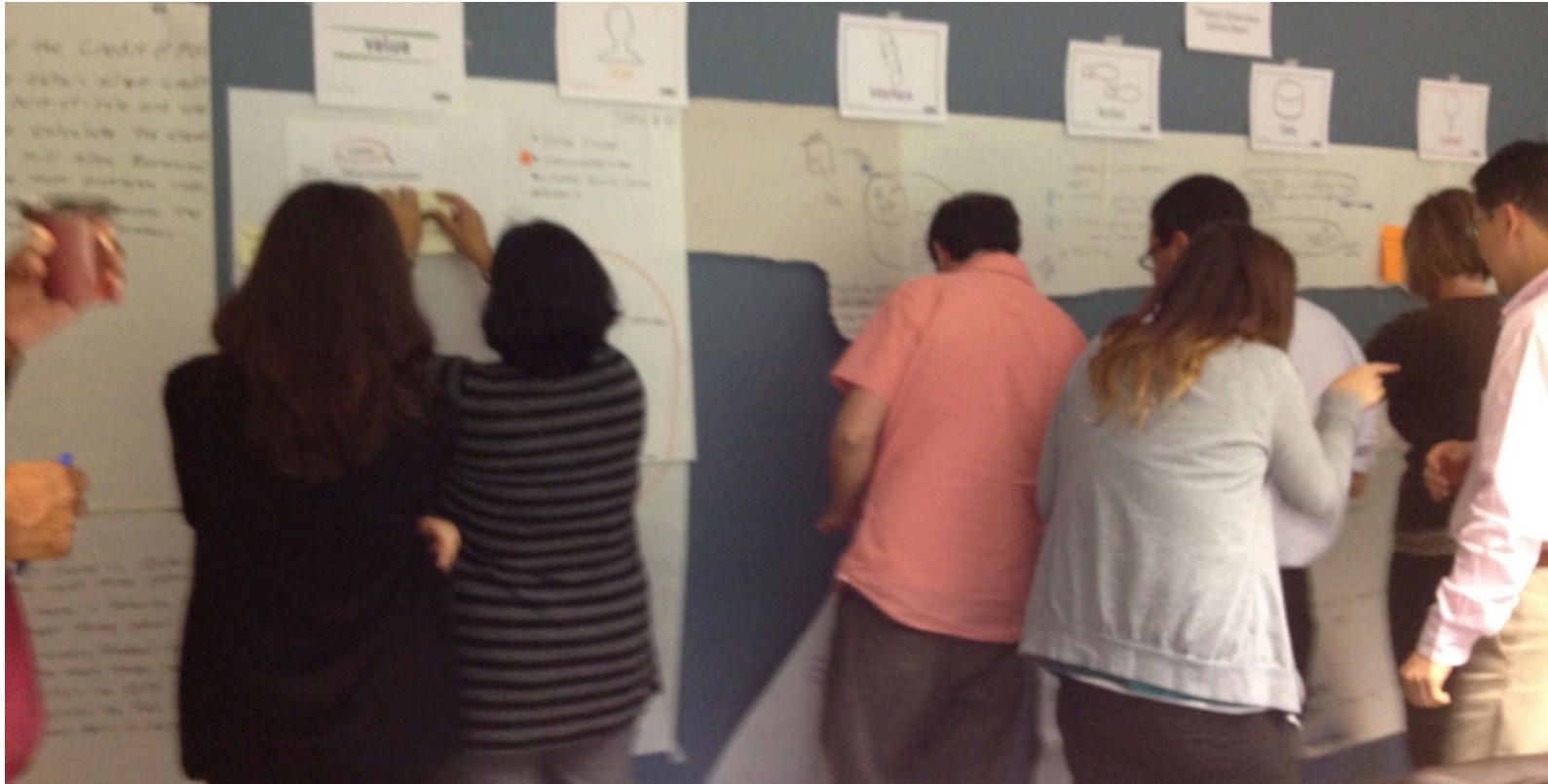
# structured conversation & 7 product dimensions

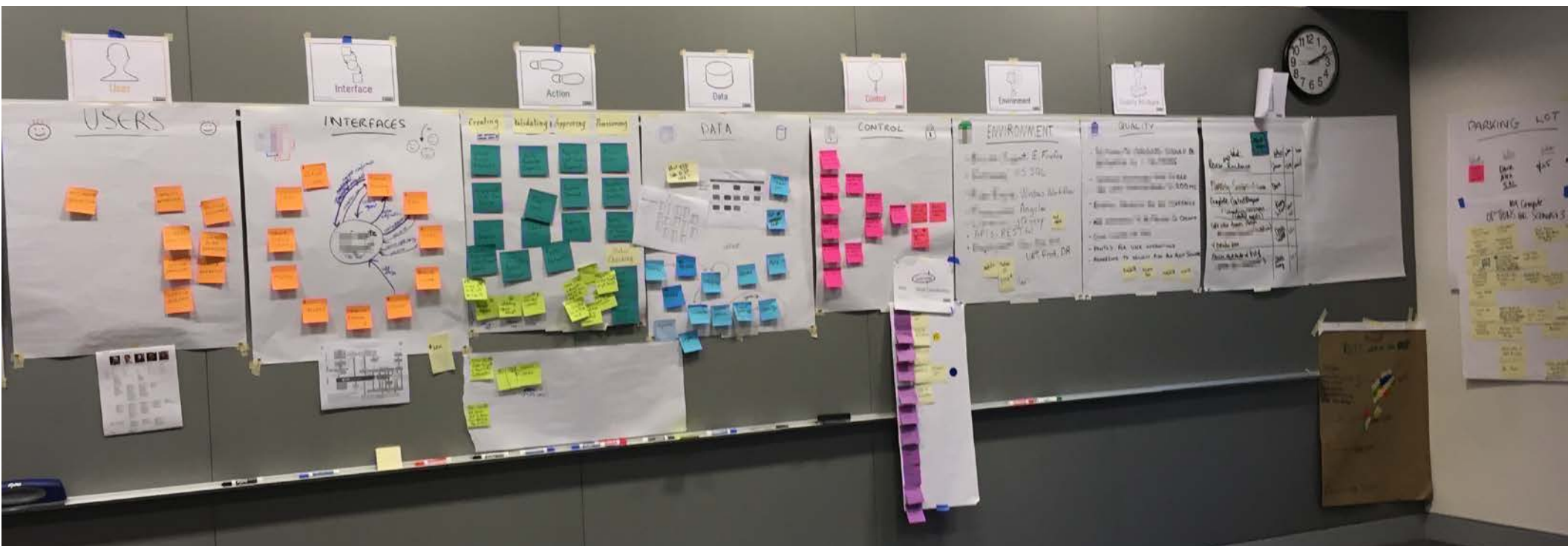


# SC & 7 product dimensions

						
User	Action	Data	Control	Environment	Interface	Quality Attribute
Options	Options	Options	Options	Options	Options	Options
						

# conversing





# Concerts4Me

At C4Me we are always looking for ways to enhance our concert goers' experience.

Our newest initiative:  
**partner with restaurants who want to connect with C4Me members attending neighboring concerts.**



value

Vision:

Goals:

Objectives:

Problems:

Dependencies: ...

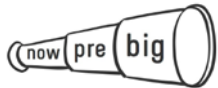
Risks: ...

Costs: ...

### Product Partners

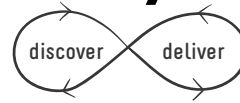


Value Considerations







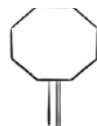


Hypothesis:

# Discovery Board

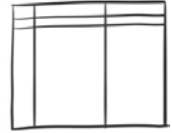


our  
example

## 7 Product Dimensions: Options

						
User	Interface	Action	Data	Control	Environment	Quality Attribute

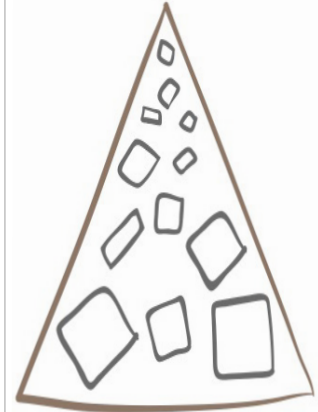
### Plan





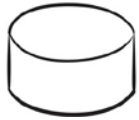




Theme:  
Persona:

1	2

### Backlog



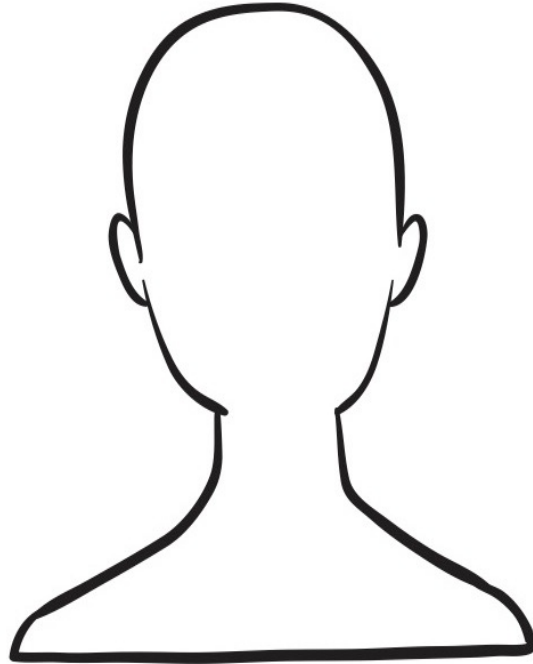
# discovery board

						
User	Action	Data	Control	Environment	Interface	Quality Attribute
Options	Options	Options	Options	Options	Options	Options

Download Discovery Board kit: <http://www.discovertodelivery.com/visual-language.php>



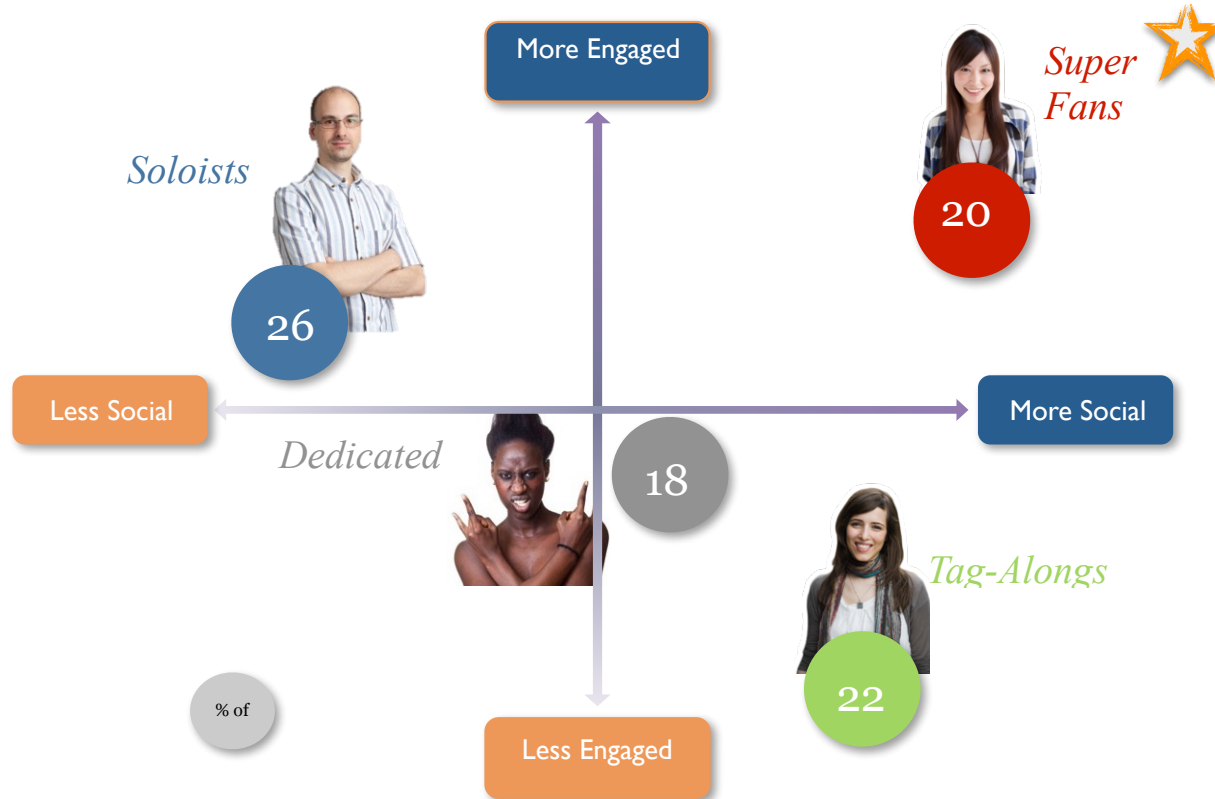
# User





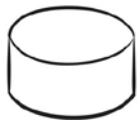

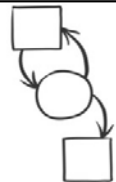


**Users**  
interact with  
the product



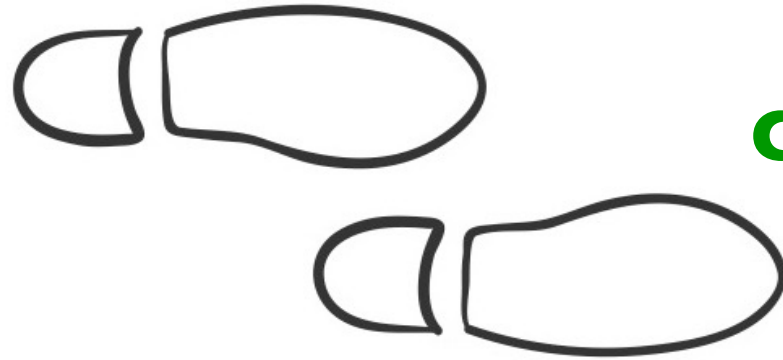
# C4Me Members



# discovery board

						
User	Action	Data	Control	Environment	Interface	Quality Attribute
Options	Options	Options	Options	Options	Options	Options
C4Me Member						
Dedicated						
Soloist						
Super Fan						
Tag Along						





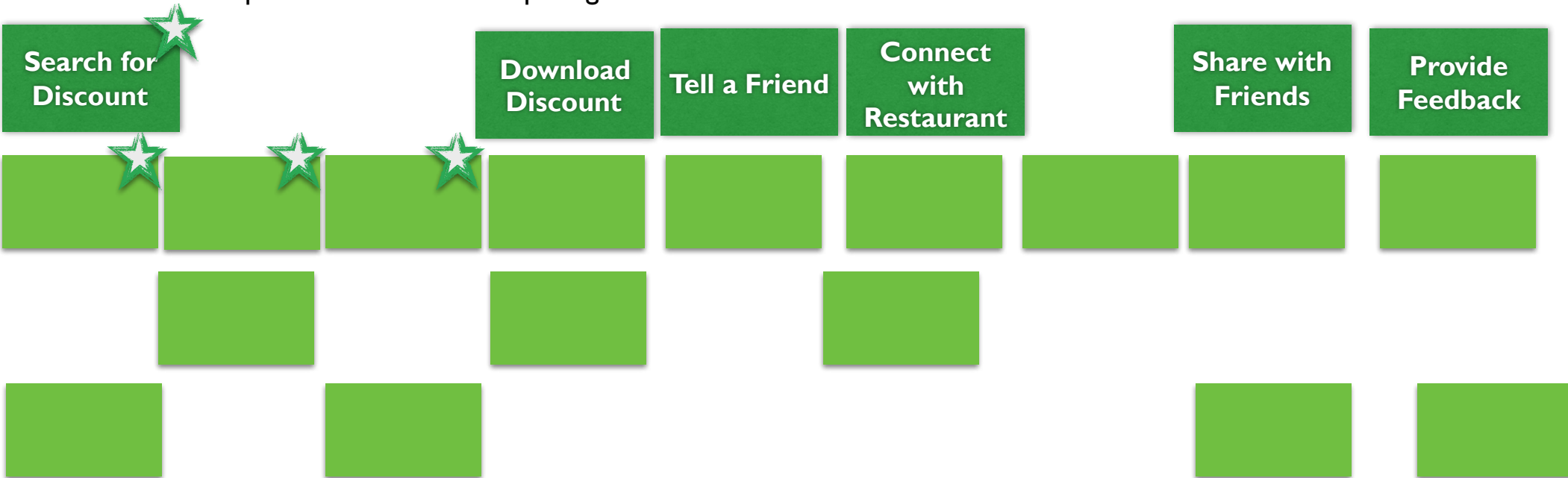
**The product  
provides  
capabilities  
for users**

# Action



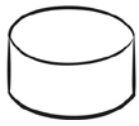

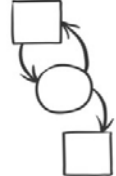






## Story Map

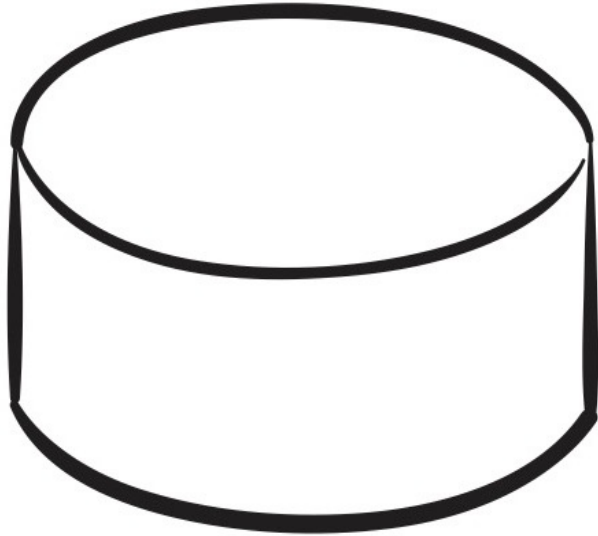
Shows sequent of tasks to accomplish goal



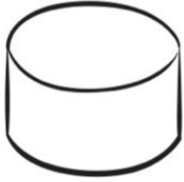
# discovery board

						
User	Action	Data	Control	Environment	Interface	Quality Attribute
Options	Options 	Options	Options	Options	Options	Options
C4Me Member	Search for discount					
Dedicated	Download disc coupon					
Soloist 	Tell a friend					
Super Fan	Connect w restaurant					
Tag Along	Share experience					
	Provide feedback					

# Data



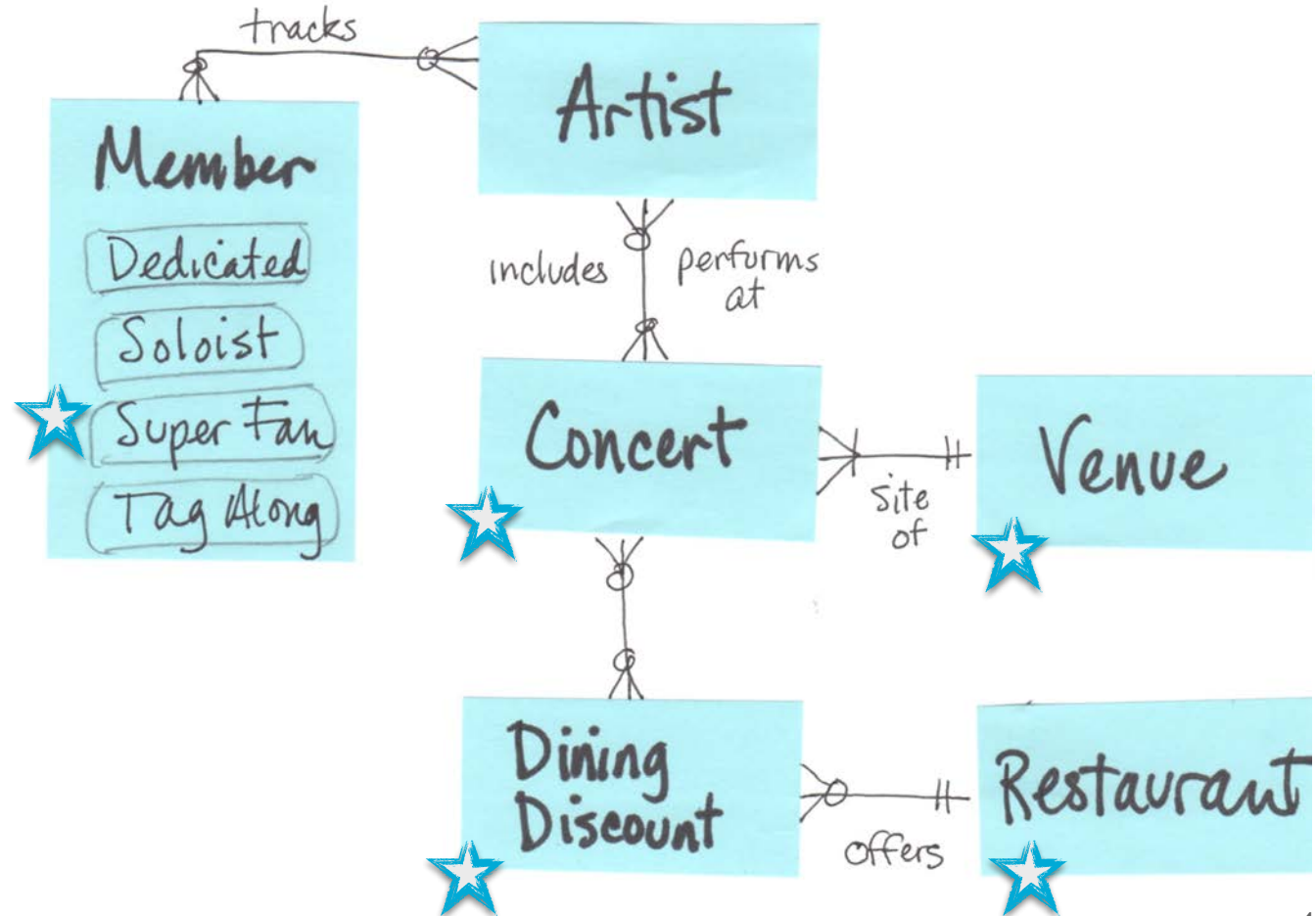
The product  
includes  
a repository  
of **data** and  
useful information



# Data



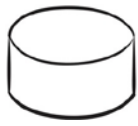

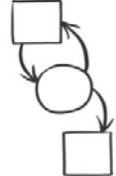


## Data Model

Shows logical structure of data and their relationships

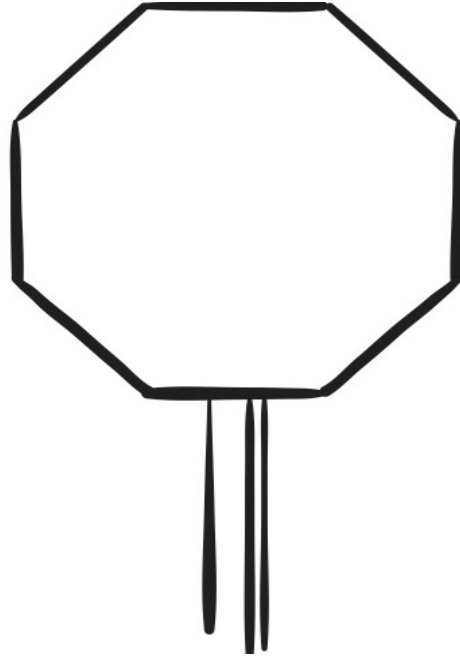




# discovery board



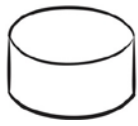

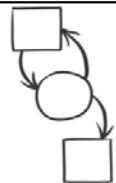


						
User	Action	Data	Control	Environment	Interface	Quality Attribute
Options	Options	Options	Options	Options	Options	Options
C4Me Member	Search for discount	Artist				
Dedicated	Download disc coupon	C4Me Member				
Soloist	Tell a friend	Concert				
Super Fan	Connect w restaurant	Venue				
Tag Along	Share experience	Restaurant				
	Provide feedback	Dining Disc				

# Control

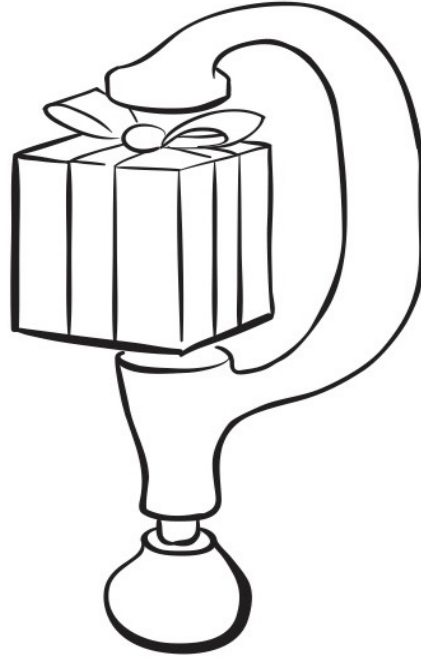


The product  
enforces  
**constraints**

# discovery board



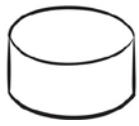

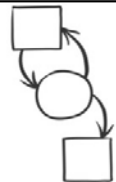


						
User	Action	Data	Control	Environment	Interface	Quality Attribute
Options	Options	Options	Options	Options	Options	Options
C4Me Member	Search for discount	Artist	Anyone can search for C4Me partner restaurants			
Dedicated	Download disc coupon	C4Me Member	Only C4Me members can search for dining discounts			
Soloist	Tell a friend	Concert	C4Me is not responsible for enforcing the terms of the dining discounts			
Super Fan	Connect w restaurant	Venue	Only "active" dining discounts can be searched			
Tag Along	Share experience	Restaurant	Only C4Me members can download a dining discount coupon			
	Provide feedback	Dining Disc				

# Environment

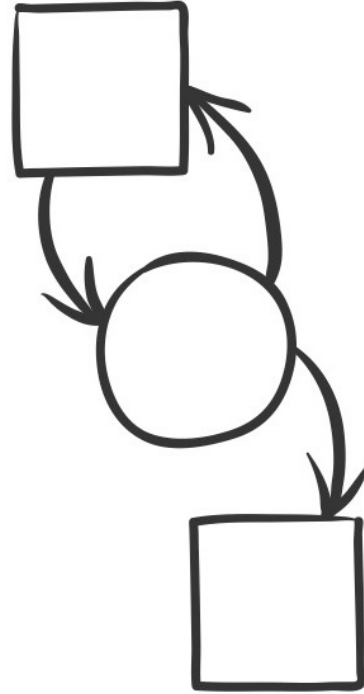


The product  
conforms to  
physical properties  
and technology  
platforms

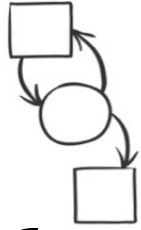
# discovery board

						
User	Action	Data	Control	Environment	Interface	Quality Attribute
Options	Options	Options	Options	Options	Options	Options
C4Me Member	Search for discount	Artist	Anyone can search for C4Me partner restaurants	Facebook		
Dedicated	Download disc coupon	C4Me Member	Only C4Me members can search for dining discounts	iOS		
Soloist	Tell a friend	Concert	C4Me is not responsible for enforcing the terms of the dining discounts	Chrome v50 and up		
Super Fan	Connect w restaurant	Venue	Only "active" dining discounts can be searched	Safari		
Tag Along	Share experience	Restaurant	Only C4Me members can download a dining discount coupon	Android 4.1 and up		
	Provide feedback	Dining Disc		Android Wear device		
				Apple Watch		

# Interface



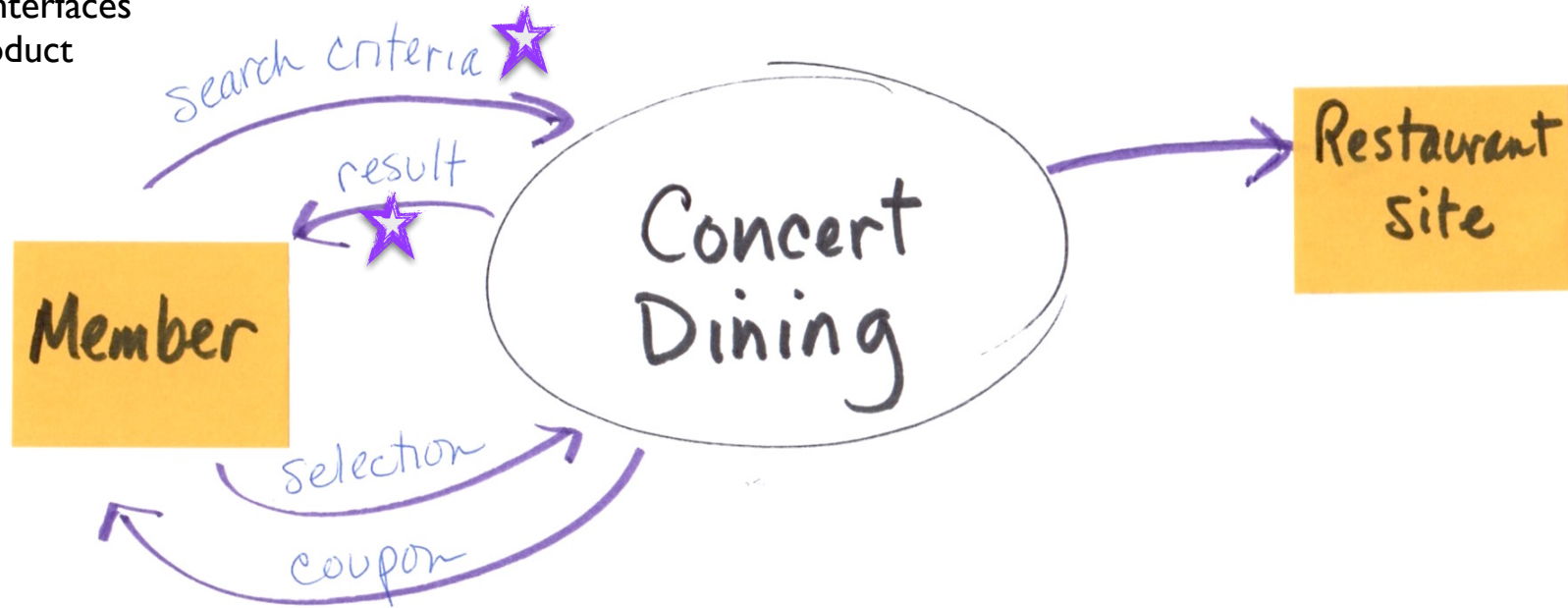
The product  
**interfaces** to  
users, systems,  
and devices





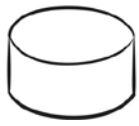

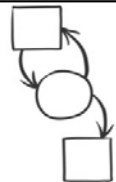


# Interface

## Context Diagram

Illustrates interfaces  
to/from product

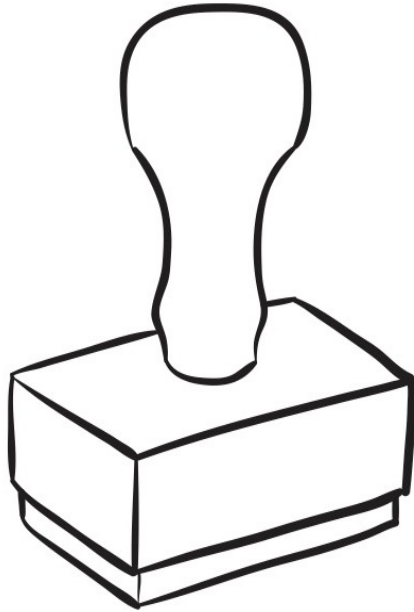


# discovery board

						
User	Action	Data	Control	Environment	Interface	Quality Attribute
Options	Options	Options	Options	Options	Options	Options
C4Me Member	Search for discount	Artist	Anyone can search for C4Me partner restaurants	Facebook	Search criteria	
Dedicated	Download disc coupon	C4Me Member	Only C4Me members can search for dining discounts	iOS	Search results	
Soloist	Tell a friend	Concert	C4Me is not responsible for enforcing the terms of the dining discounts	Chrome v50 and up	Selection	
Super Fan	Connect w restaurant	Venue	Only "active" dining discounts can be searched	Safari	Coupon	
Tag Along	Share experience	Restaurant	Only C4Me members can download a dining discount coupon	Android 4.1 and up	Link to restaurant site	
	Provide feedback	Dining Disc		Android Wear device		
				Apple Watch		

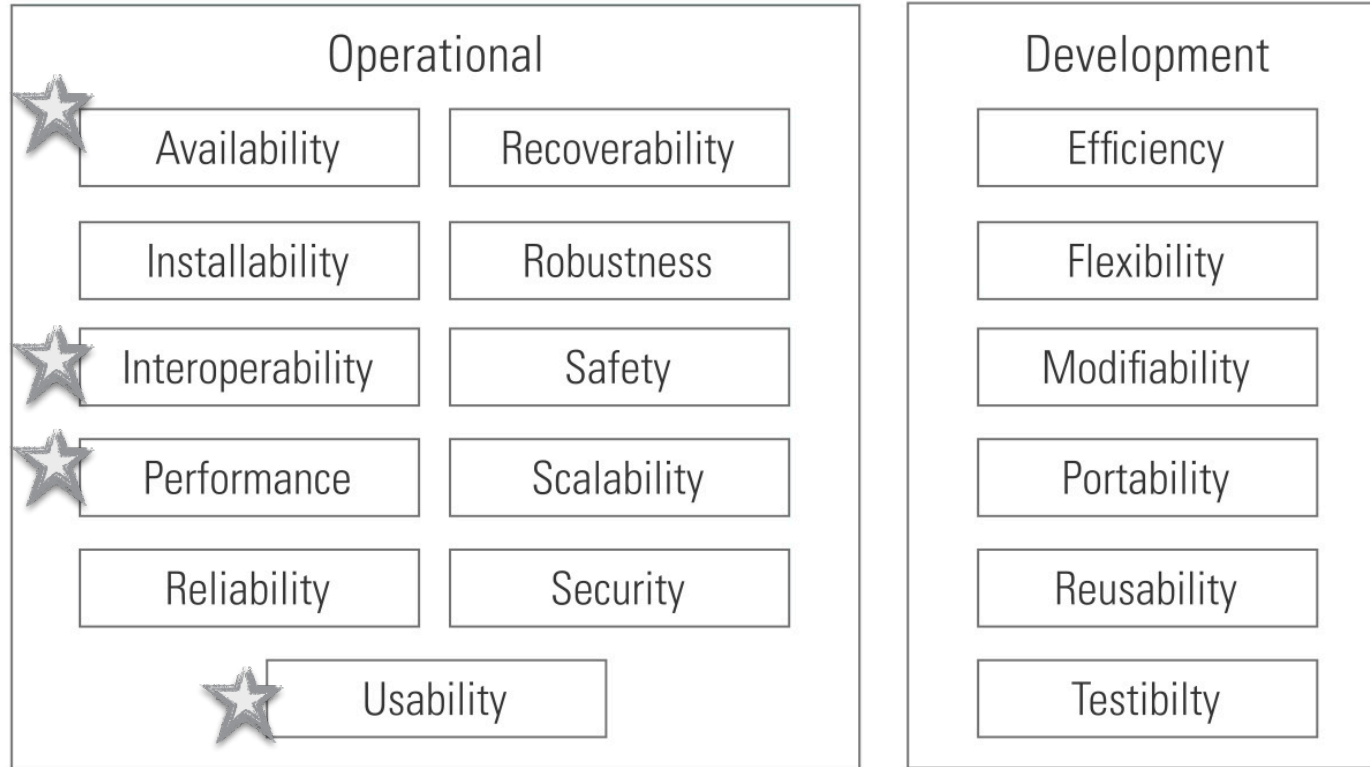


# Quality Attribute



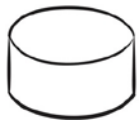

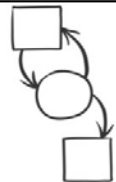



















The product has  
certain properties  
that qualify its  
operation and  
development

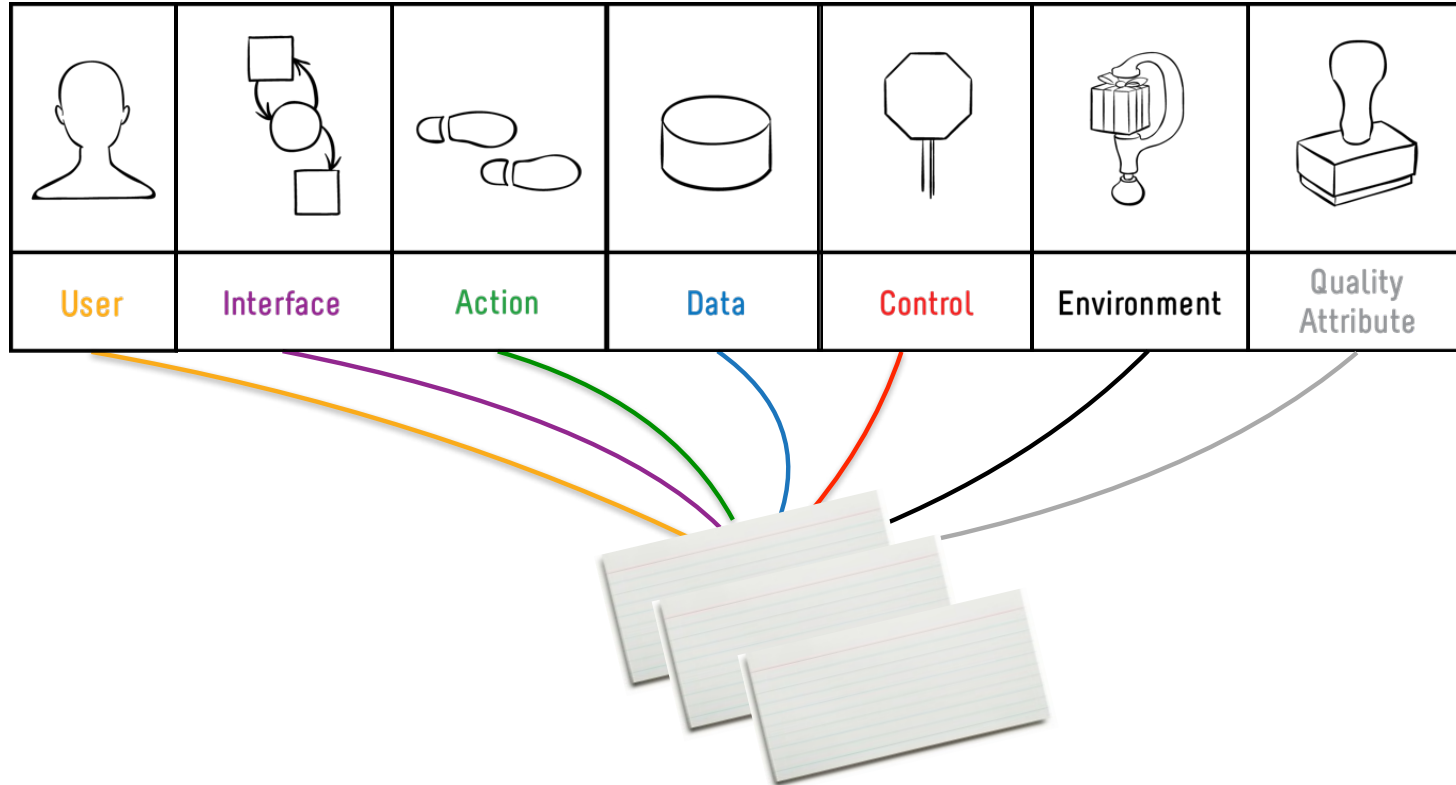
# quality attributes



# discovery board

						
User	Action	Data	Control	Environment	Interface	Quality Attribute
Options	Options	Options	Options	Options	Options	Options
C4Me Member	Search for discount 	Artist	Anyone can search for C4Me partner restaurants	Facebook	Search criteria 	Availability 
Dedicated	Download disc coupon	C4Me Member 	Only C4Me members can search for dining discounts 	iOS 	Search results 	Performance
Soloist 	Tell a friend	Concert 	C4Me is not responsible for enforcing the terms of the dining discounts 	Chrome v50 and up 	Selection	Interoperability
Super Fan	Connect w restaurant	Venue 	Only "active" dining discounts can be searched 	Safari 	Coupon	Usability
Tag Along	Share experience	Restaurant 	Only C4Me members can download a dining discount coupon	Android 4.1 and up	Link to restaurant site	
	Provide feedback	Dining Disc		Android Wear device		
				Apple Watch		

# assemble



# story w 7Ds



User

As a **Super Fan concert goer**  
I need to **search for**  
**concert-related dining discounts**  
so I can enhance my concert experience

Only members can search for dining discounts  
Only "active" dining discounts can be searched

iOS, Chrome v50

Search query and result

Available 95% of time



Action



Data



Control



Quality  
Attribute



Interface

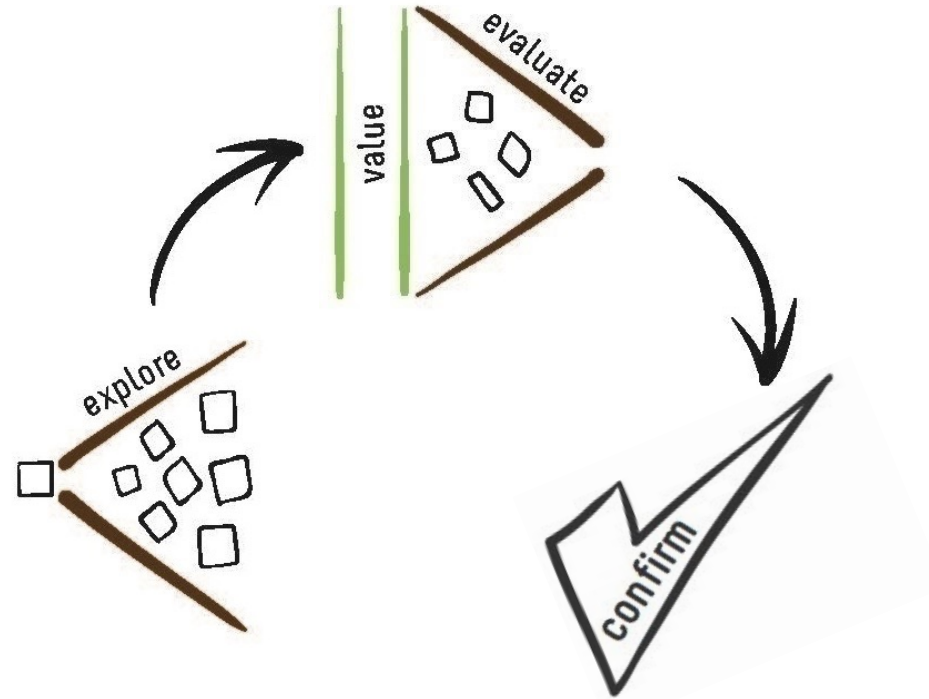


Environment

# refined and ready?

# structured conversation

## *confirm to learn*

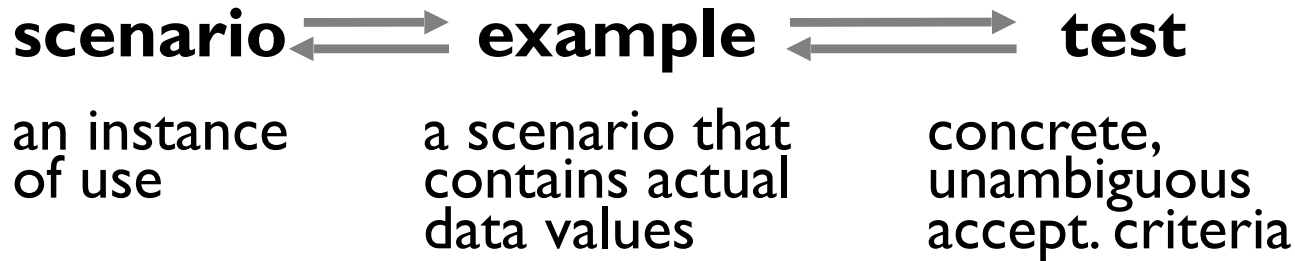


# confirm stories



As a **Super Fan concert goer**  
I need to **search for**  
**concert-related dining discounts**  
so I can enhance my concert experience

Only members can search for dining discounts  
Only "active" dining discounts can be searched



# confirm w scenarios



scenario: an instance of use  
search for nearby restaurant...  
search for locally owned restaurant  
search by cuisine

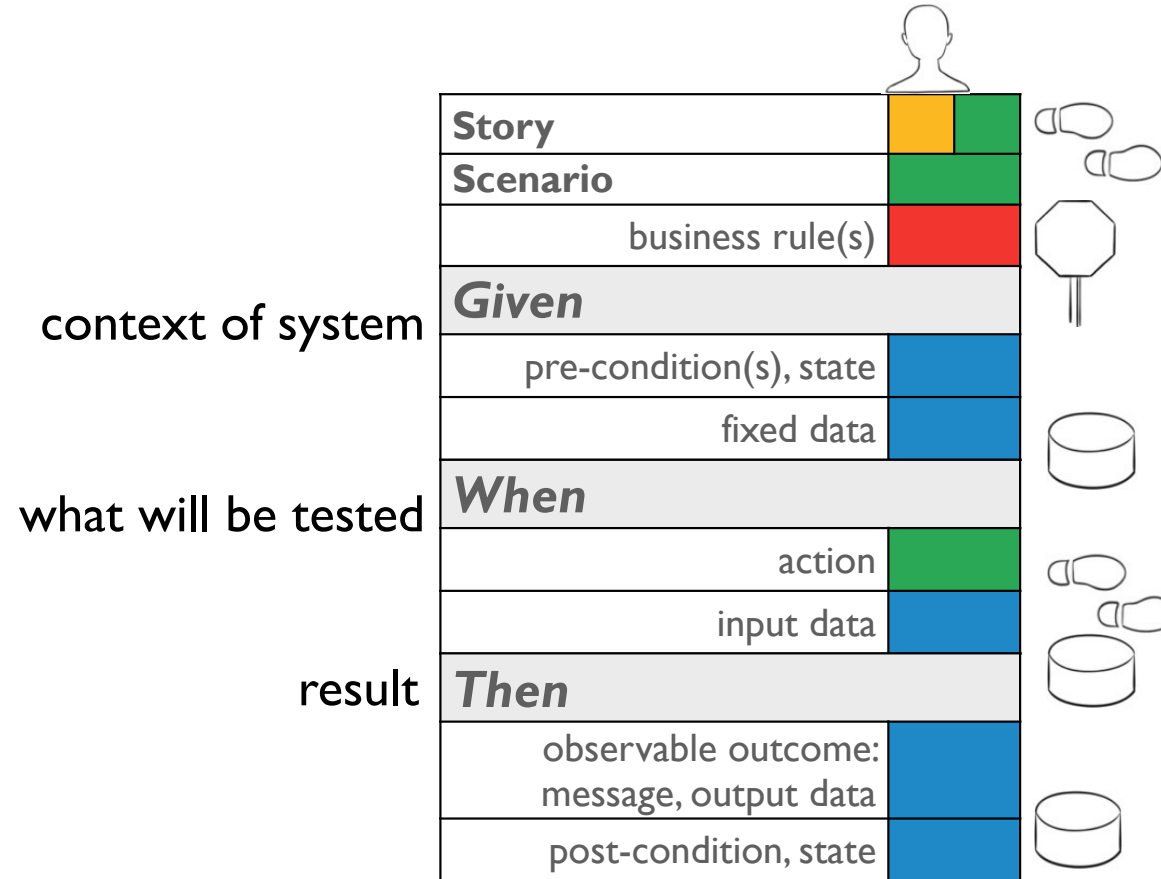


**“An example would be handy  
right about now”**

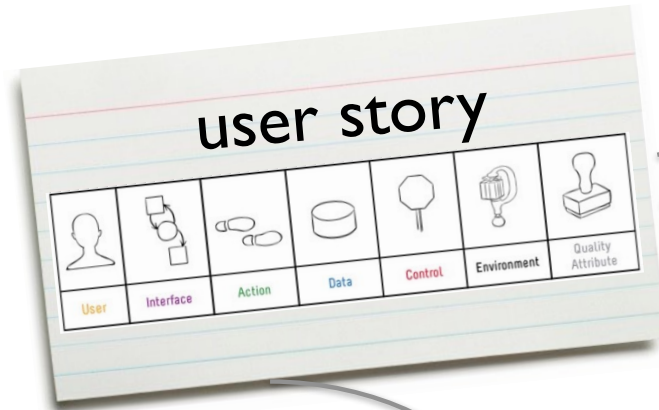
Brian Marick, 2007



# given-when-then



# refinement: the whole story

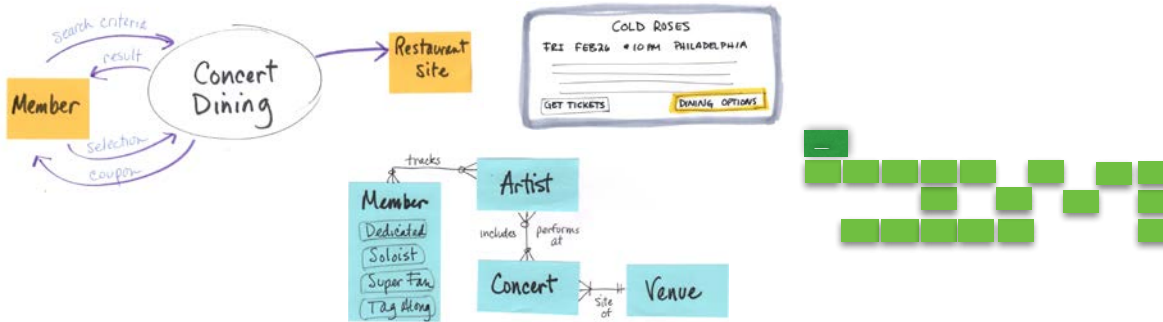


scenarios

examples

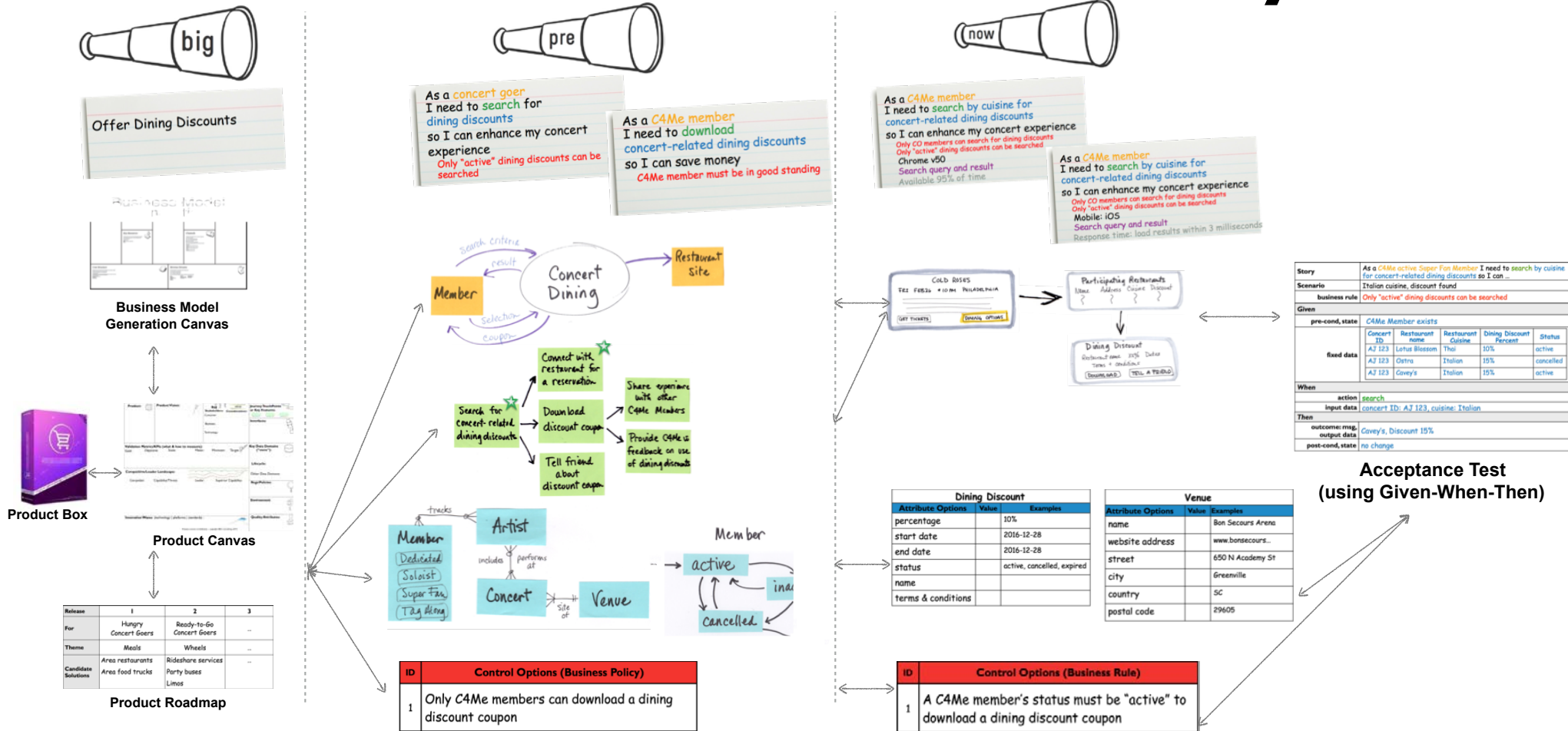
tests

analysis models on Discovery Board

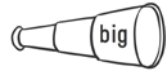


executable  
and  
enabling  
specification

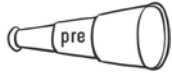
# refinement by view



# cascading Discovery Boards



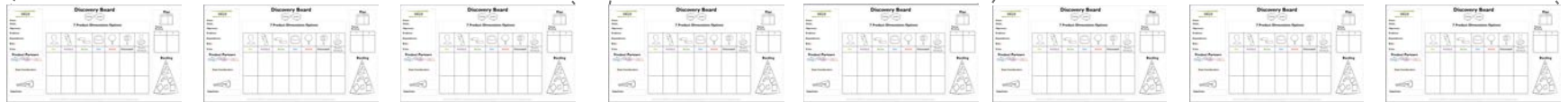
*Initial PBR*



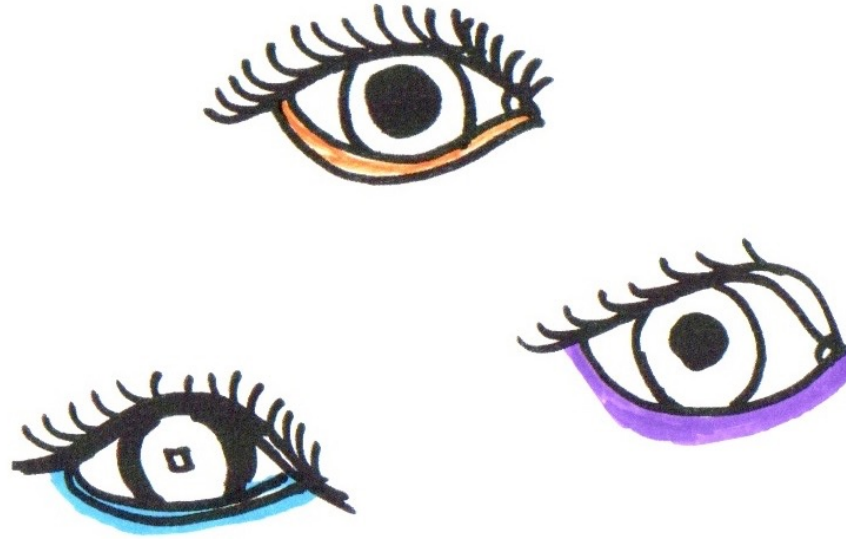
*Overall &  
Multi-team  
PBR  
(Requirements  
Areas)*



*Single-  
team PBR*



# let's see *examples from real discovery sessions*

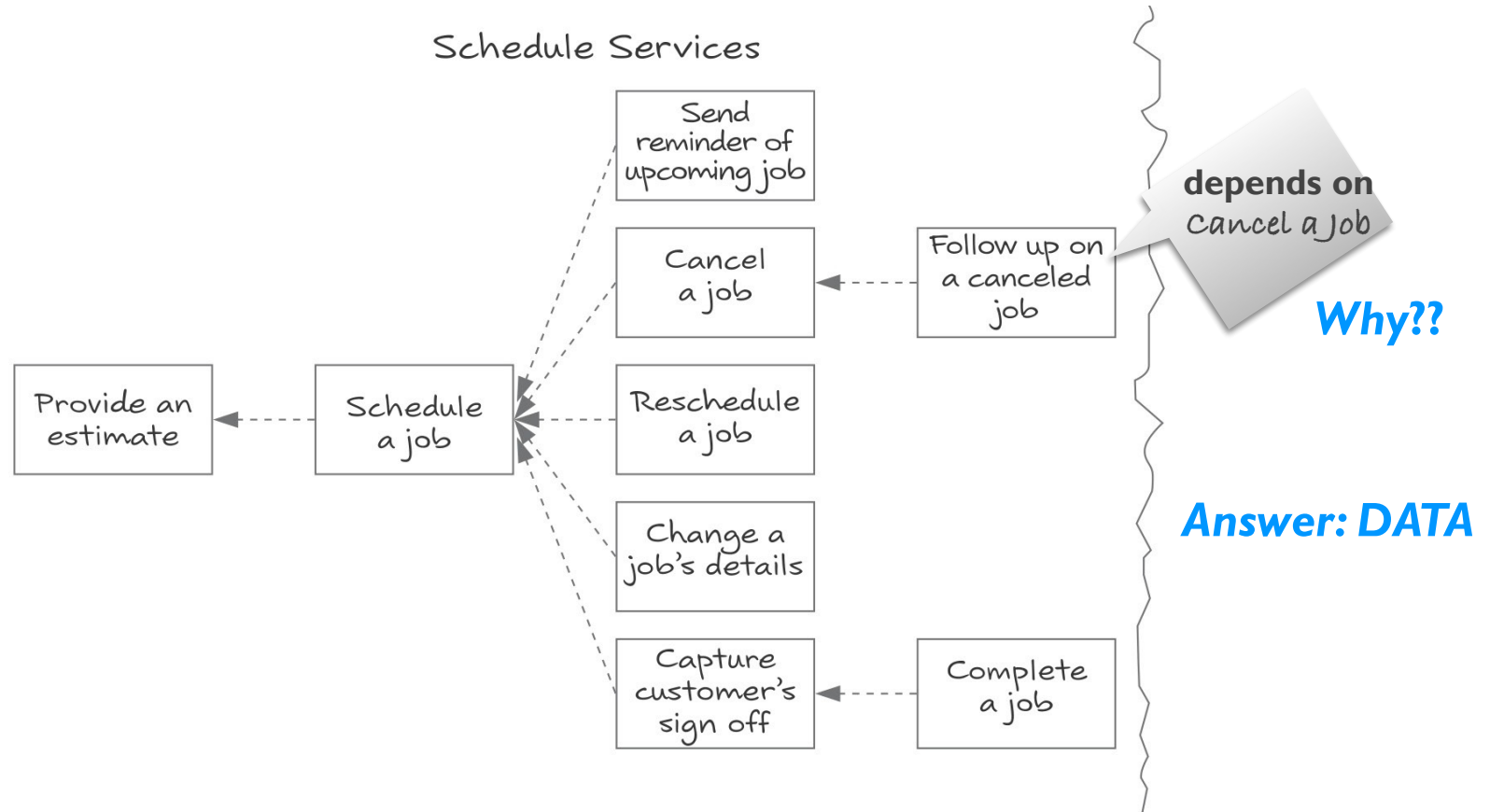


(Photos followed for in-person presentation)

**tip:**  
**detecting dependencies among  
features/stories**

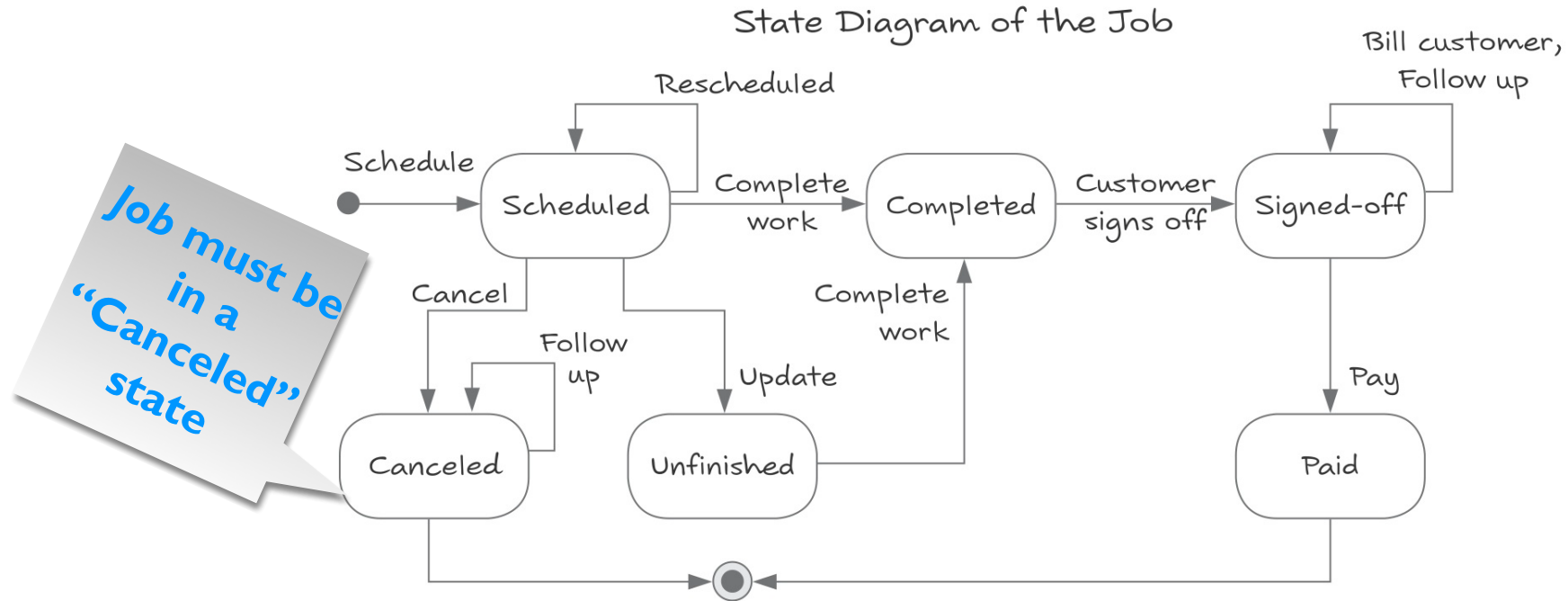
**visual models help!**

# dependency graph





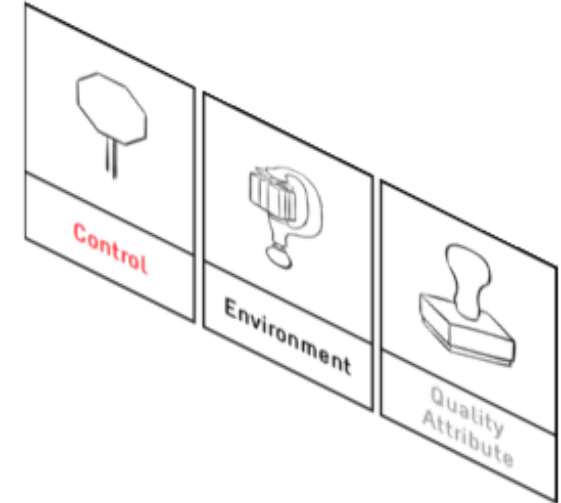
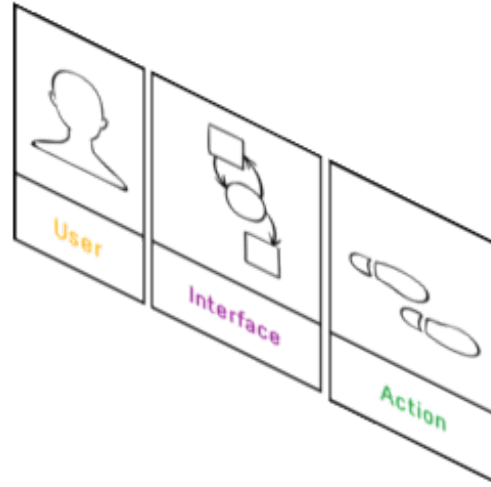
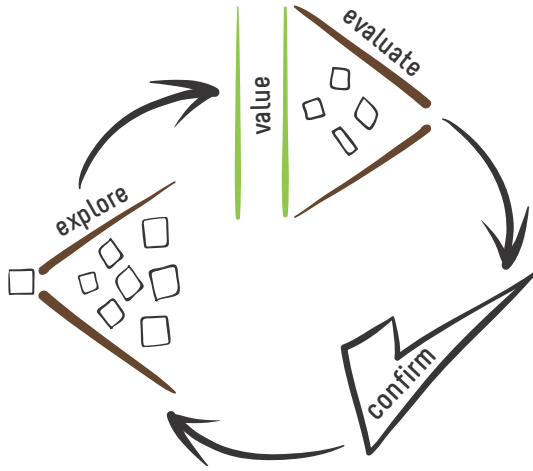
# dependencies: *know your data/data states*



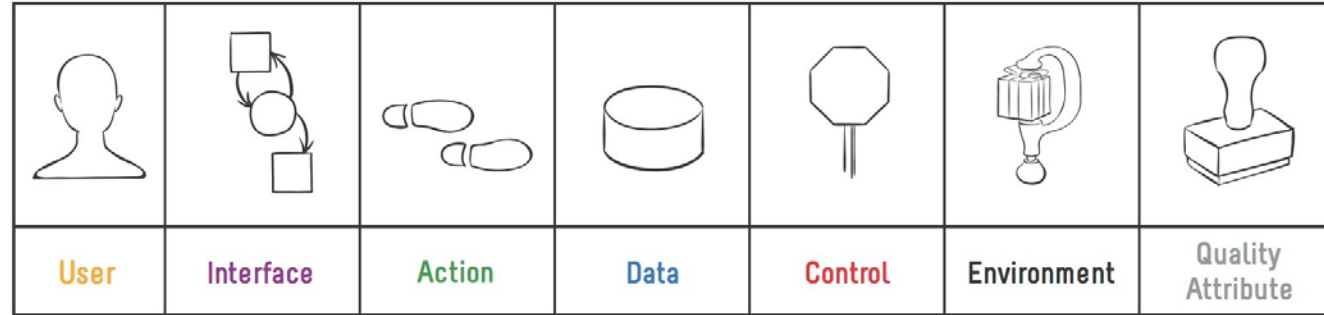
# **good practices**

## **engagement and collaboration**

# beware!



# plan 7D strategy

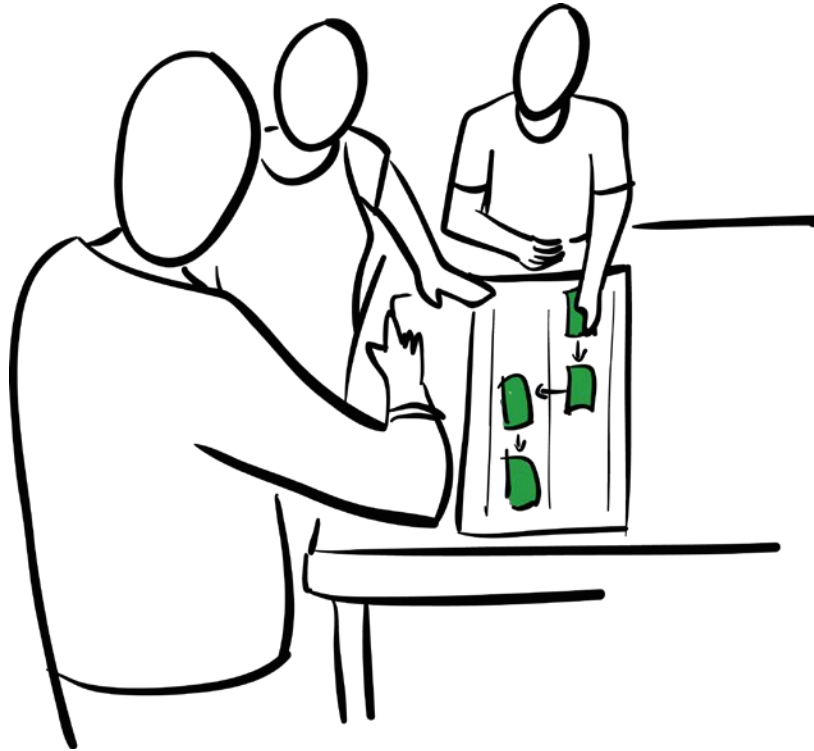


Identify your leading dimension(s)

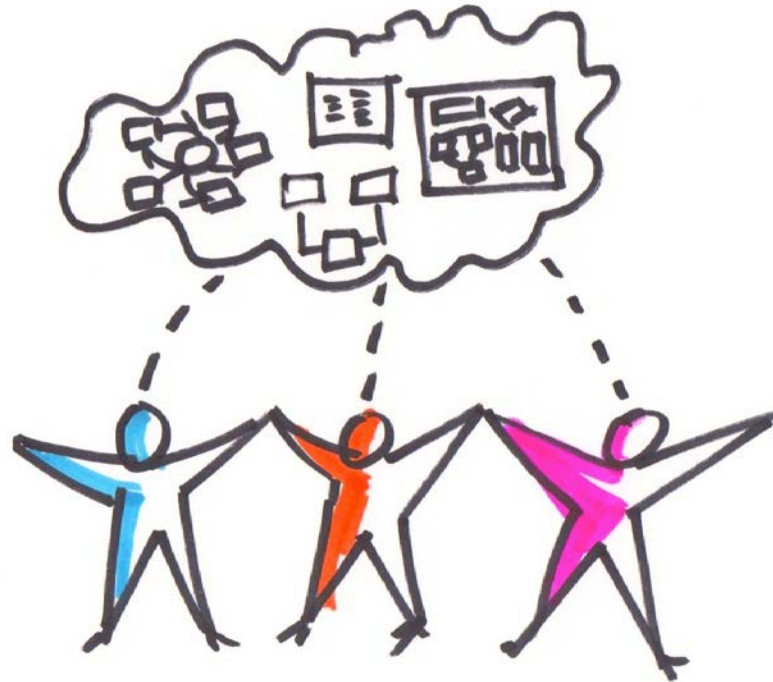
# model to communicate *not to document*



# collaboration pattern: *Break the Model*



# collaboration pattern: *Multi-Model*



[https://www.ebgconsulting.com/blog/  
the-eyes-have-it-how-visuals-can-energize-your-product-discovery/](https://www.ebgconsulting.com/blog/the-eyes-have-it-how-visuals-can-energize-your-product-discovery/)

# collaboration tips

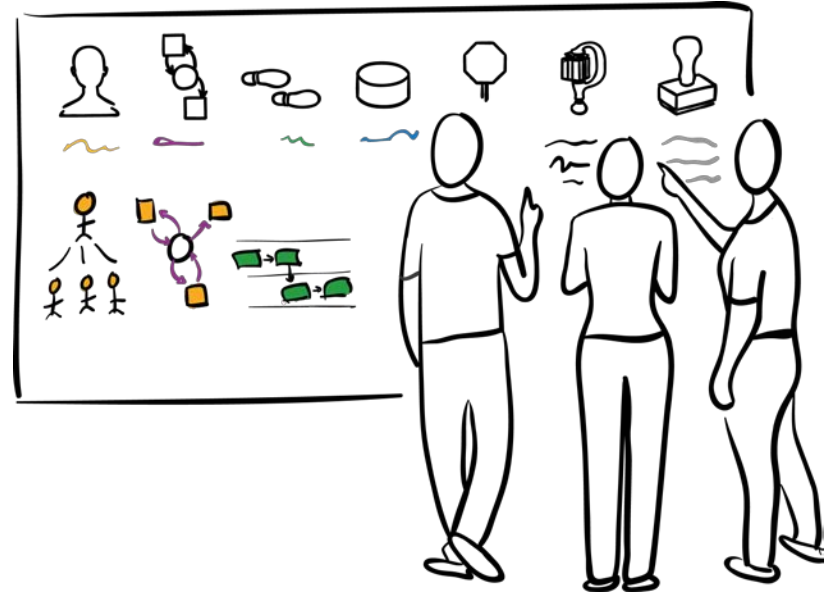
Right people

Neutral facilitator

*Divide, Conquer, Correct, Collect* pattern






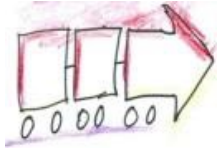
Visualize, multi-model

Prepare, prepare, prepare





# 6P's for refinement workshops

purpose	participants	principles	products	place	process
 <p><b>why</b> do we do things?</p> <ul style="list-style-type: none"> <li>• goals</li> <li>• needs</li> <li>• motivation</li> </ul>	 <p><b>who</b> is involved?</p> <ul style="list-style-type: none"> <li>• people</li> <li>• roles</li> <li>• responsibilities</li> </ul>	 <p><b>how</b> do we function?</p> <ul style="list-style-type: none"> <li>• guidelines</li> <li>• working agreements</li> <li>• ground rules</li> </ul>	 <p><b>what</b> do we create?</p> <ul style="list-style-type: none"> <li>• deliverables</li> <li>• decisions</li> <li>• plans</li> <li>• next steps</li> </ul>	 <p><b>where</b> is it located?</p> <ul style="list-style-type: none"> <li>• venue</li> <li>• logistics</li> </ul>	 <p><b>when</b> do we do what?</p> <ul style="list-style-type: none"> <li>• activities</li> <li>• sequence</li> </ul>

Source: Requirements by Collaboration, by E. Gottesdiener

# stay connected!



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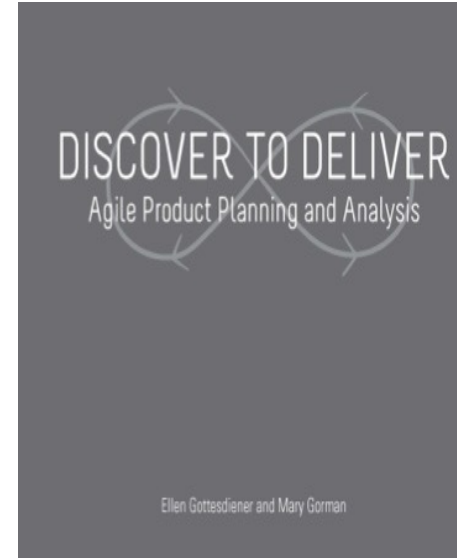
# give-aways



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