Agile Process Backlog Refinement Process

Frequency:
1-2 hours per sprint or more if needed

After reading this procedure, the audience will be able to understand the procedure for conducting a Backlog Refinement Session, which is an informal meeting with the service delivery team to review user stories and edit (refine) them to bring them to the Definition of Ready. Simply stated, the Definition of Ready is the point that a user story is ready to work on by the development team. The user story will have been presented to the development team several times, such that there is a unified understanding of the user story.

The goal of this session is to solicit input from the Product Owner in order to craft a better product. It is attended by the entire service team and any SME that can provide information on the intent of the story. Developers can ask clarifying questions in order to hone in on the true intent of the story.

There is an expectation that teams will spend time refining their backlog a minimum of once per sprint. The value associated with backlog refinement is:

- A prioritized backlog of work that is ready to work on.
- User stories that have been refined to a point of delivering value
- Teams that deliver more frequently
- Teams that collaborate more effectively
- Teams that have better communication
- Teams that understand the roadmap better and what it will take to deliver the work

Setup Tasks:

Each service delivery team will need to establish a product backlog that has about two sprints worth of work that has been prioritized by business value.
Scrum Masters should work with the team to find a consistent day/time in sprint that the team can count on to know it is reserved for backlog refinement.

- **Digital Service & Agile Business Teams:** Each sprint, the team is required to refine their product backlog in preparation for future sprints. During this meeting, the Scrum Master:
  - Reviews a few product backlog items that the Product Owner has prioritized for a future sprint.
  - Can review a story from the backlog and decompose it into user stories
  - Can review a new feature or epic to be decomposed into user stories

We attempt to have the story meet INVEST criteria.

A good user story should be:

- "I" ndependent
- "N" egotiable
- "V" aluable
- "E" stimable
- "S" mall
- “T” estable

Backlog Refinement Session Workflow Steps

Step	Description
1.	A backlog refinement session is scheduled, and an invite sent to the whole service team, Product Owner, and any related SME’s that can assist with either

	history of existing functionality or assist with defining the intent of the user story. The agenda is the list of user stories or work that will be addressed during the session. It is helpful to include a link to the user stories/backlog items in the email invite, along with a request that the team review the work prior to the start of the session. The goal of this session is to bring the work to the point of meeting the Definition of Ready.
2.	The inputs to the Backlog Refinement session are the next few user stories that are not in sprint and do not yet meet the Definition of Ready, and which have been prioritized by the Product Owner.
3.	The backlog refinement session is typically facilitated by the Scrum Master, but anyone on the team can facilitate it. The following items are addressed during the session: • Attendees are reminded that that technical priority will be expressed by the Development Lead, but that the Product Owner retains prioritization and scope authority. • The list of user stories for refinement are emailed to the development team, and any necessary SME or team upon which there exists a dependency. • It is expected that the team will review the email and associated user stories before the refinement session so that they come prepared to get the most value out of the session. • Testers and developers are expected to ask questions that lead to clarification of the intended work. • It is okay/acceptable to add Developer or Tester notes to remind them when they actually begin work on the story. • The user story format is present. Is there a persona? Is there a defined single want? • Is there a defined business value identified for completing this work? • Is there a defined development team estimate (based on complexity) identified for completing this work? • Is there acceptance criteria listed that is testable? Are the acceptance criteria short, simple to understand, and written in the present tense (i.e., system does…)? • Is the user story small enough to finish in the two week sprint? If the answer to that is no, then it must be decomposed/broken down further until it can be accomplished in a one or day period of time. • Is the user story accomplishable in a one or two day period of time? If the work is still bigger than one or two days, continue to ask how it can be decomposed further. • Are there any dependencies? If there are dependencies, are they noted in the story? Have the dependencies been communicated to the people that can resolve them? • Has the team discussed the tasks that will be necessary to complete the acceptance criteria? This isn't necessary until sprint planning but doing so in backlog refinement can often help a team to estimate. • Is there an estimate on the story? Does the team agree that the estimate will handle the actual work? • Does the user story meet the INVEST criteria?

4.	Each of the above questions are asked/answered, and where appropriate, documented in the story itself. Once the team agrees that the user story meets the Definition of Ready they can move onto the next story. If the person that has the needed answers isn't in attendance, move the story into the next backlog refinement session invite and identify a person that can get the information in advance of that session.
5.	The entire group collaborates on what to do next, so that the session brings the work into the Definition of Ready.
End of Backlog Refinement Session Process	