

# Backlog / Story Grooming



**RefineM** PROJECT  
MANAGEMENT  
CONSULTING

**NK Shrivastava, PMP, RMP, ACP, CSP, SPC4**  
CEO/Consultant/Enterprise Agile Coach - RefineM

# Agenda

1. Introductions and Expectations
2. Backlog/Story Grooming
  - a) Career Paths
  - b) Agile
  - c) Program / Portfolio Management
  - d) Trainer
  - e) Summary / Q&A
3. Upcoming Learning Opportunities from RefineM
4. How to get 1 PDU for this Webinar?
5. Rewarding Our Star Attendees
6. Final Q & A

# RefineM's Virtual Lunch & Learn

**This is a monthly webinar delivered during the lunch hour in the first week (Wednesdays) of every month.**

**It's designed to help you learn while you eat lunch, providing a relaxed environment to enhance your experience.**

**The monthly webinars will cover a variety of Project Management / Agile topics.**

# Your Expectations

What are your expectations from this webinar?

Why are you here today?

# NK Shrivastava, PMP, RMP, ACP, CSP, SPC4

## RefineM

Helping organizations turn their project management capability into a *competitive advantage*



CEO/Consultant since Dec 2011

- \* Agile Transformation/Coaching/Adoption
  - ✓ Enterprise Agile Coach @ IBM
  - ✓ PMI-ACP One-on-One Coaching
- \* Project Management/ Process Improvement Consulting and Training
- \* Products for Project Professionals
  - ✓ Essential Gear for Project Managers
  - ✓ PMP Exam Simulator
  - ✓ Online self-paced training videos on Agile Fundamentals, PMP Exam Prep and PDU bundle

## My professional journey b/f RefineM

20+ years of Successful Project Leadership

- \* Led 100s of projects of all sizes, successfully
- \* Recovered many projects, saved millions of \$
- \* Implemented numerous process improvements
- \* Coached/mentored 100s of PMs, and executives
- \* Board Member – SWMO PMI Chapter (2008-2014)

RefineM

# Attendee Questions

1. What are some insights for a mature PMP?  
(from Mustafa M.)

# What's New at RefineM



RefineM PROJECT  
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[www.RefineM.com](http://www.RefineM.com)

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[Contact@RefineM.com](mailto:Contact@RefineM.com)

# What's New at RefineM

Upcoming Free Webinars	Date
Business Requirements Gathering for Agile Projects	Oct 2
I Want to Be a PMP, Now What?	Nov 7

## \* New Training and Outreach

- ✓ Several in-person and virtual PMP classes in 2018
  - ✓ New BA classes – Business Analysis Fundamentals and Business Requirements Gathering for Agile Projects
  - ✓ New Agile class – Kanban Fundamentals / Kanban 101
- \* PMP Exam Prep Test Simulator - <https://Examprep.RefineM.com>
- \* [Agile](#) and [Business Requirements Gathering](#) Videos at Vimeo



# Agile Concepts



- Agile Manifesto
- Agile Twelve Principles
- Scrum
- Product and Sprint Backlogs

# Manifesto for Agile Software Development

We are uncovering better ways of developing software by doing it and helping others do it. Through this work we have come to value:

**Individuals and interactions** over processes and tools

**Working software** over comprehensive documentation

**Customer collaboration** over contract negotiation

**Responding to change** over following a plan

That is, while there is value in the items on the right, we value the items on the left more.

*Was developed in 2001 by 17 agile advocates in Snowbird, UT*

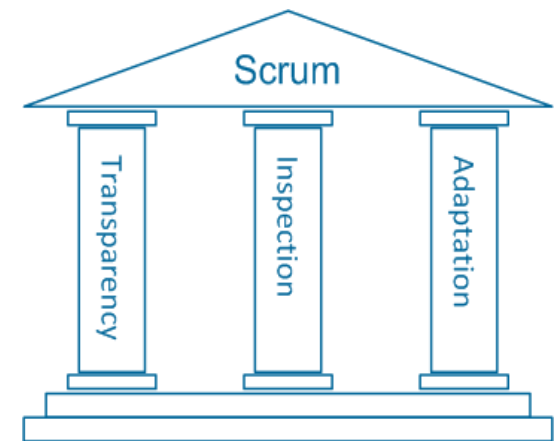
# Agile Twelve Principles

1. **Satisfy the customer** thru early and continuous delivery
2. **Welcome changing requirements** even late in development
3. **Deliver working software frequently** a couple of weeks to a couple of months
4. **Work together daily** (business people and developers)
5. **Motivated individuals**, build projects around them, and give them freedom
6. **Face-to-face conversations** is the most efficient and effective method
7. **Working software** is the primary measure of progress
8. **Sustainable development** i.e. maintain a constant pace indefinitely
9. **Continuous Attention** to technical excellence & good design enhance agility
10. **Simplicity** – the art of maximizing the amount of work not done – is essential
11. **Self-organizing teams** deliver the best architectures, requirements, and designs
12. **At regular Intervals** the team reflects on how to become more effective

# Scrum

**Scrum** is an iterative and incremental agile software development framework that focuses on delivering the highest business value in the shortest time.

- ✓ It has been around since early 1990s.
- ✓ Its primary champions and creators were Ken Schwaber and Jeff Sutherland.
- ✓ It is built upon three pillars of Transparency, Inspection and Adaptation.
- ✓ It is a highly iterative methodology.
- ✓ While things may repeat, that does not mean that they are identical each time. Rather the team makes small improvements and changes throughout the project life cycle.



# Scrum Roles

- ✓ **Product owner** - represents the stakeholders and is the voice of the customer. He or she is accountable for ensuring that the team delivers value to the business. Develops and maintains product backlog.
- ✓ **Scrum Master** - Scrum is facilitated by a Scrum Master, who is responsible for helping the team follow the Scrum process. He/she is also accountable for removing impediments to the ability of the team to deliver the sprint goal/deliverables.
- ✓ **Agile teams** - are formed (mostly) of generalizing specialists. A generalizing specialist, sometimes called a craftsperson, is someone who has one or more technical specialties.

**What about other roles such as BA, QA and PM?**

# Scrum Ceremonies

## Sprint Planning:

If sprint duration is 2 weeks then sprint planning meeting is  $2 * 2 = 4$  hrs

If sprint duration is 4 weeks then sprint planning meeting is  $4 * 2 = 8$  hrs

**Part 1** focuses on what the team is being asked to build and is attended by both the product owner and the team.

**Part 2** focuses on how the team plans to build the desired functionality. Although the entire team must attend Part 2, attendance by the product owner is optional.

## Sprint Review:

4hrs

At the end of each sprint a sprint review meeting is held. During this meeting the Scrum team shows what they accomplished during the sprint. Typically this takes the form of a demo of the new features.

# Agile Concepts



- Agile Manifesto
- Agile Twelve Principles
- Scrum
- Product and Sprint Backlogs

# What is a Backlog?

## \* **A backlog is:**

- ✓ A list of requirements, features, and enhancements, bugs, tasks ....
- ✓ Prioritized by Product Owner with input from team, customer
- ✓ Crucial to ensure that the customer gets the highest value
- ✓ Broken down to three levels in most Agile / Scrum projects
  - Product Backlog: Highest-level backlog for whole product
  - Release Backlog: Chunk of product backlog to be done in a release
  - Sprint / Iteration Backlog: Chunk of product backlog for a sprint / iteration

Source: Scrum Guide. ©2014, Scrum Inc. Creative Commons Licensed.  
<http://www.scrumguides.org/docs/scrumguide/v1/scrum-guide-us.pdf>



# Agile Backlogs

## \* **Product Backlog contains**

- ✓ **Themes**- very top-level requirements or objectives e.g. A new website
- ✓ **Epics** – very large user stories e.g. A new website section
- ✓ **User Stories** – an **Independent, Negotiable, Valuable, Estimatable, Small, Testable (“INVEST”)** piece of functionality
- ✓ As items rise to the top of the product backlog i.e. become higher priority, the Product Owner will work with the team to break Themes and Epics into User Stories
- ✓ Once broken down into User Stories, the Team will provide delivery estimations and commit to delivering a number of these stories (in line with pre-defined priorities) in the following sprint.
- ✓ The Product Owner will then begin to define, prioritize and add additional User Stories to the backlog in preparation for the next sprint – this might include new requirements or changes emerging from the previous sprint.

# Levels of Backlog

Product Backlog

Release 1 Backlog

Release 2 Backlog

Sprint

Sprint

Sprint

Sprint

Sprint

Sprint

Sprint

# Product Backlog Example



## Sample Product Backlog

<u>ID</u>	<u>Features / User Stories</u>	<u>Impacted Application</u>	<u>Approach</u>	<u>Effort (Hours)</u>	<u>Priority</u>	<u>Release</u>	<u>Status (Active/ Done)</u>
CHART-1	Display results in a bar chart.			12	1	1	
EXPL-1	Generate explanations of results.			8	2	1	
AREA-1	Display Success Areas.			4	3	2	
IMPR-1	Display Areas of Improvement			4	4	2	
RESC-1	Display resources with results.			4	5	2	
EMAIL-1	Send the results in an email.			12	6	3	
PDF-1	Offer a PDF version of results.			20	7	3	

# Example - VersionOne

The screenshot displays the VersionOne Product Planner interface. At the top, there is a navigation bar with 'My Home', a search bar, and user profile icons. Below this is a secondary navigation bar with 'Project Sample Product Backlog', 'Product Planner', 'Release', and 'Team' options. The main area is titled 'Backlog' and features a search filter, 'Move To Project' dropdown, and pagination controls showing '1-7 of 7'. A table lists backlog items with columns for Title, Estimate Pts., Project, Detail Estimate Hrs., and Sprint. The last item, 'Offer a PDF version of results.', is highlighted in blue and has an 'Edit' button. A sidebar on the left contains various utility icons.

Title	Estimate Pts.	Project	Detail Estimate Hrs.	Sprint	
Display results in a bar chart.	6.00	Sample Product Backlog	12.00	Sprint 8/10/2018	Edit
Generate explanations of results.	4.00	Sample Product Backlog	8.00	Sprint 8/10/2018	Edit
Display Success Areas.	4.00	Sample Product Backlog	8.00	Sprint 8/17/2018	Edit
Display Areas of Improvement	4.00	Sample Product Backlog	8.00	Sprint 8/17/2018	Edit
Display resources with results.	4.00	Sample Product Backlog	8.00	Sprint 8/17/2018	Edit
Send the results in an email.	6.00	Sample Product Backlog	12.00	Sprint 8/24/2018	Edit
Offer a PDF version of results.	6.00	Sample Product Backlog	20.00	Sprint 8/24/2018	Edit

# Agile Backlogs (Product & Sprint)

## \* **Sprint/Iteration Backlog:**

- ✓ The Sprint Backlog is the output of the sprint planning meeting.
- ✓ It is essentially the list of tasks that the Scrum team needs to complete during the sprint in order to turn a selected set of product backlog items into a deliverable increment of functionality.
- ✓ Unlike product backlog items, sprint backlog tasks have a time-based (hourly) estimate.
- ✓ Since the core scrum team is doing the work, they are responsible for keeping the Sprint Backlog up to date.

# Key Agile Metrics

## \* **Sprint Backlog:**

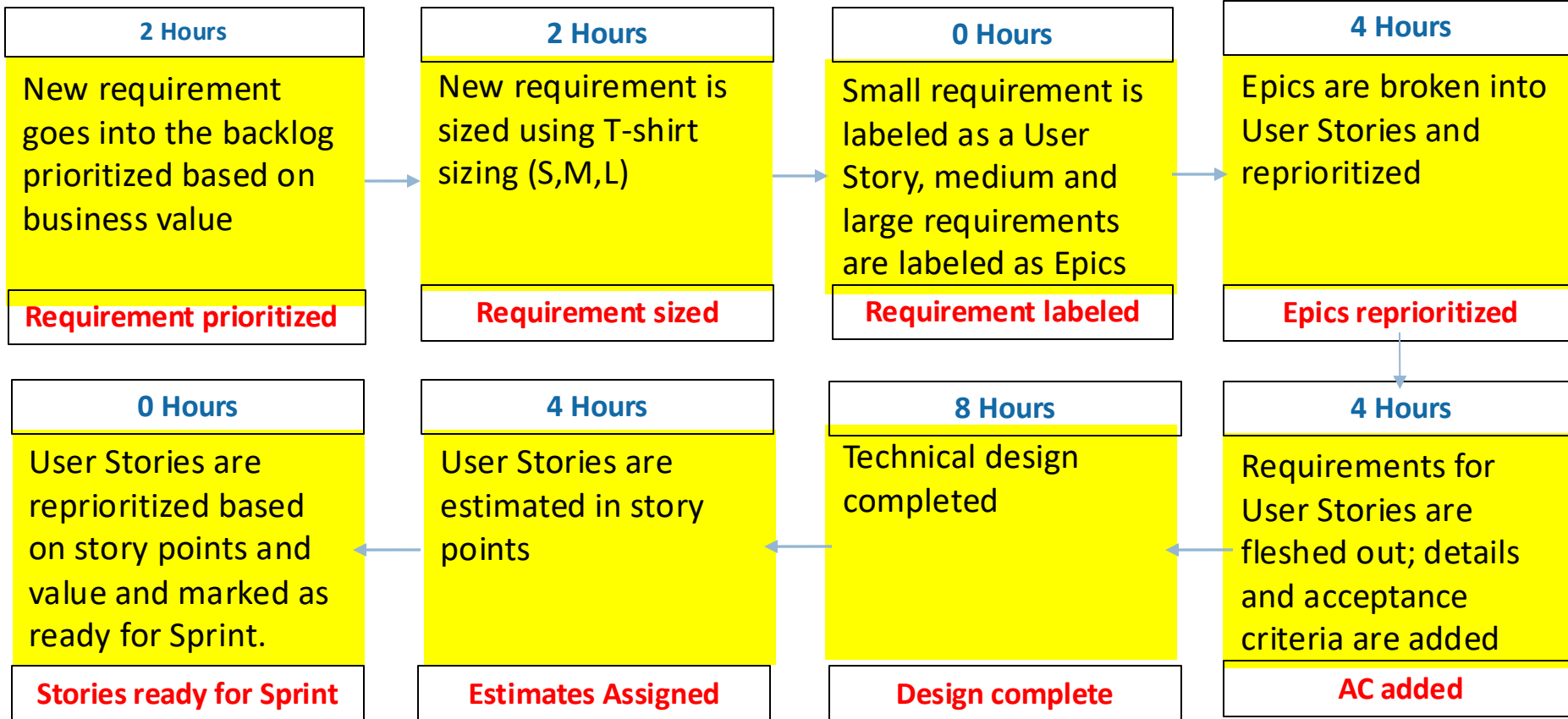
- ✓ During a sprint, new tasks may be discovered and adjusted. This is perfectly normal behavior.
- ✓ The Scrum team simply adds the new tasks to the sprint backlog or adjusts the wording for tasks in progress.
- ✓ As the Scrum team completes tasks, they should be marked on the sprint backlog.
- ✓ The sprint backlog shows the scrum team members what is complete and what remains. This data will help team members run an effective daily scrum meeting.

# Backlog Grooming / Refinement Steps

## \* Steps in Backlog Grooming/Refinement

1. New requirement goes into the backlog prioritized based on business value
2. New requirement is sized using T-shirt sizing (S,M,L)
3. Small requirement is labeled as a User Story, medium and large requirements are labeled as Epics
4. Epics are broken into User Stories and reprioritized
5. Requirements for User Stories are fleshed out; details and acceptance criteria are added
6. Technical design completed
7. User Stories are estimated in story points
8. User Stories are reprioritized based on story points and value and marked as ready for Sprint.

# Value Stream Map for Grooming



**Acceptance Criteria**  
**Wait Time (WT) Total = 24 Hours**

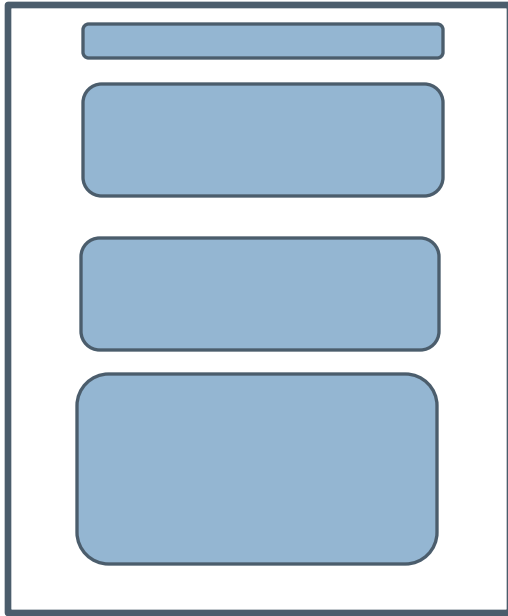


# Coarse-Grained vs. Fine-Grained

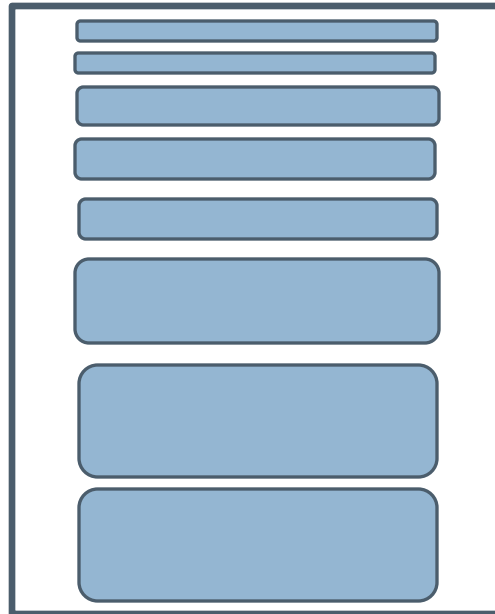
- \* What is the difference between coarse-grained and fine-grained requirements?

Coarse-Grained	Fine-Grained
High-level summary of <i>what</i> needs to be delivered	Low-level details, likely including more of <i>how</i> the requirement is delivered
Likely to receive a higher story estimate such as 20 or above (or XL in t-shirt)	Likely to receive a lower story point estimate such as 8 or 13 (or S,M in t-shirt)
Difficult to assign a time estimate	Easy to assign a time estimate
Likely at the bottom of the product backlog because it is not ready for refinement	Likely at the top of the product backlog because it is ready for refinement

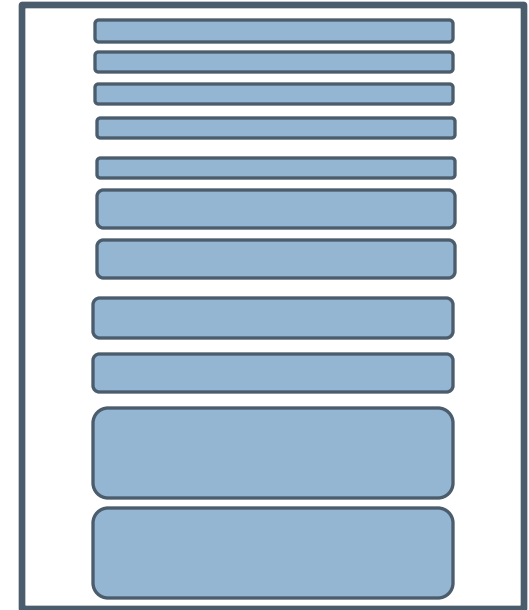
# Coarse-Grained vs. Fine-Grained



**Pre-Grooming**



**1<sup>st</sup> round Grooming**



**2<sup>nd</sup> round Grooming**

# Grooming / Refinement Best Practices

- \* PO should work with customer and development team
- \* Should be done on regular basis (may be weekly)
- \* Consider basing priority on one/more of the following:
  1. Customer priority: what does the customer want and when?
  2. Cost of delay
  3. Urgency of feedback: how important is the feedback?
  4. Size: time the dev team will take to implement?
  5. How backlog items are related
    - E.g. if A is important for B and C, then do A first
  6. Functionality: What parts are needed to go live?

Source: The Product Backlog: your ultimate to-do list. <https://www.atlassian.com/agile/backlogs>

# Next Lunch and Learn

- \* ***Business Requirements Gathering for Agile Projects***
  - ✓ How does requirements gathering differ between Agile and Waterfall?
  - ✓ What steps can you take to better gather requirements on an Agile project?
  - ✓ What techniques can you use?
- \* ***Tuesday, October 2, 11:00 AM-12:00 PM Central***
- \* ***[ProjectManagement.com](http://ProjectManagement.com)***

**Register Today - Don't wait for the last Minute**

# RefineM's Agile Fundamentals Videos

The screenshot shows a Vimeo video player interface. At the top left is the Vimeo logo and navigation links: 'Join', 'Log in', 'Host videos', 'Sell', and 'Watch'. A search bar with 'Search On Demand' and an 'Upload' button is at the top right. The main video area displays a thumbnail for 'Agile Fundamentals' featuring a cheetah and the text 'NK Shrivastava, PMP, RMP, ACP, CSP, SPC4 CEO/Enterprise Agile Coach - RefineM'. A 'Watch Trailer' button is visible. To the right of the video is a sidebar with 'Module 1 Agile Concepts Part 1' and a 'Subscribe \$49.99/mo' button. Below the video, the title 'Agile Fundamentals' is shown with 'HD' and 'from RefineM on February 20, 2018'. A 'Receive Updates' button is at the bottom left. At the bottom right, there is a 'Subscribe \$49.99/mo Unlimited streaming' button and a note: 'Watch on iOS, Android, Apple TV, Roku, and Chromecast. Learn more'.

## About the Agile Video Series:

- Four core modules cover Agile principles and mindset, planning and estimation, project execution, and more
- Scrum, XP, Lean, and Kanban are all covered in the videos
- Supplemental 1-hour videos take deeper dives into specific topics like daily standups and retrospectives
- Over 9 total hours of videos
- \$49.99/month for subscription to all videos

*Get started on your Agile journey.*

More details at <https://vimeo.com/ondemand/refinemagile>

# Next Online Training Course

## First Steps Toward Agility: Incorporating Agile Practices in a Waterfall Environment



**Saturday, October 20, 2018, 9:00 AM-1:00 PM.**  
**In collaboration with KCPMI Chapter.**

***Use key Agile practices to help guide your Agile journey.***  
***Learn more at <https://refinem.com/first-steps-toward-agility-public/>***

# Attendee Questions

1. What are some insights for a mature PMP?  
(from Mustafa M.)

# RefineM's PMP Exam Prep Classes in 2018

**Earn your certification with confidence in 2018.**

**\$1,495 until 2 weeks before course start date; \$1,700 afterwards**

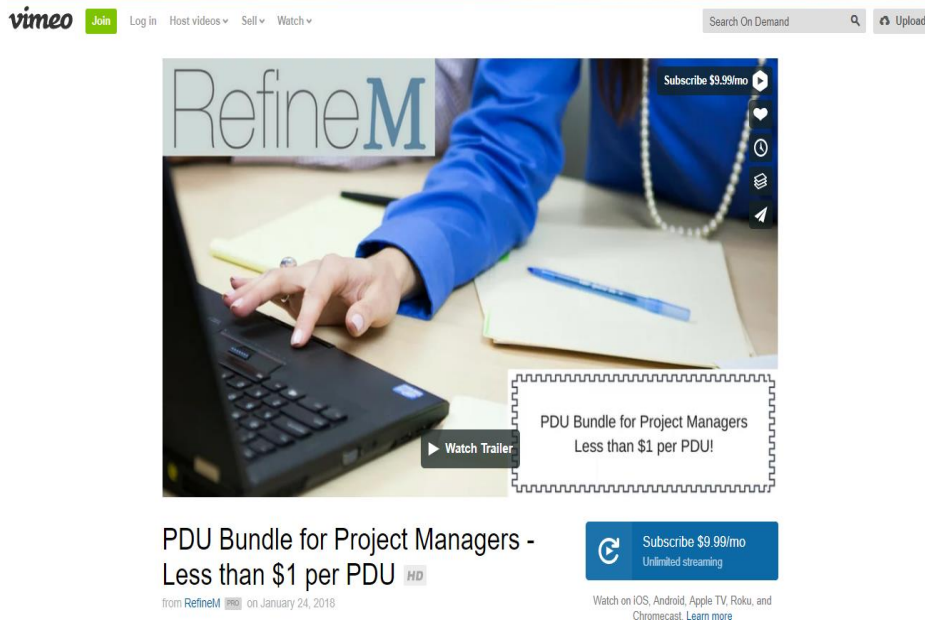
**4 days in-person; 9 half-day sessions over the Web**

Online	Springfield, MO	Kansas City, MO	Raleigh, NC	Los Angeles, CA	San Diego, CA
Dec 03-14	Nov 07-10	Oct 03-06	Oct 24-27	Nov 14-17	Oct 16-19

Please visit <https://refinem.com/pmp-exam-prep-course-public/> for more details.



# RefineM's PDU Bundle



The screenshot shows a Vimeo video player interface. At the top left, the Vimeo logo is visible along with 'Join', 'Log in', 'Host videos', 'Sell', and 'Watch' options. A search bar contains 'Search On Demand' and an 'Upload' button. The video thumbnail features a person in a blue shirt working at a desk with a laptop and papers. A 'Subscribe \$9.99/mo' button is in the top right corner of the video frame. A 'Watch Trailer' button is overlaid on the bottom left of the video. A dashed border highlights the text 'PDU Bundle for Project Managers Less than \$1 per PDU!'. Below the video, the title 'PDU Bundle for Project Managers - Less than \$1 per PDU' is displayed with an 'HD' icon. A 'Subscribe \$9.99/mo Unlimited streaming' button is on the right. At the bottom, it says 'from RefineM on January 24, 2016' and 'Watch on iOS, Android, Apple TV, Roku, and Chromecast. Learn more'.

## About the PDU Bundle:

- Over 20 1-hour videos on project management and Agile topics
- Talent Triangle categories of Technical, Strategic/Business Management, and Leadership are all covered
- More videos being added frequently
- \$9.99/month for access to all videos

*Maintain your certifications for less than \$1 per PDU.*

**More details at <https://vimeo.com/ondemand/refinempdus>**

# How to Claim 1 PDU for this Webinar?

1. Visit [ccrs.pmi.org](https://ccrs.pmi.org) and log in.
2. Click on “Report PDUs” link.
3. Click “Courses and Training” in upper left.
4. **Activity Name:** “Backlog/Story Grooming”  
*(complete this first, before you go to #5)*
5. **Provider:** “RefineM LLC” *(don’t select dropdowns)*
6. **Date started:** September 5, 2018
7. **Date completed:** September 5, 2018
8. **Contact person:** NK Shrivastava
9. **Contact phone:** (417) 763-6762
10. **Contact email:** [Trainings@RefineM.com](mailto:Trainings@RefineM.com)
11. **PDUs:** 1.00 Technical.
12. Click on the “I agree this claim is accurate” box and then Submit.

# Rewarding Our Star Attendees

- \* Anyone who attends 3 Lunch and Learn Webinars in a row is a Star Attendee and is eligible for a prize drawing for a \$10 Amazon gift card.

**This month's winner is:**  
**Mustafa M.**



**Congratulations to the winner!**  
**Stay tuned for our next drawing in September.**

# Questions?



RefineM PROJECT  
MANAGEMENT  
CONSULTING

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 [justrightpm](https://twitter.com/justrightpm)

# Training Opportunities From RefineM

Training Title	Online	Springfield	Kansas City	Raleigh	Los Angeles	San Diego
PMP® Exam Prep	Dec 03-14	Nov 07-10	Oct 03-06	Oct 24-27	Nov 14-17	Oct 16-19
Agile Fundamentals / Agile 101	Nov 26-30		Sept 24-25	Oct 11-13	Nov 07-08	Oct 10-11
PMI-ACP® Exam Prep	Nov 26-Dec 02		Sept 24-26	Oct 11-13	Nov 07-09	Oct 10-12
Leadership Skills for Managers	Oct 17	Oct 10		Dec 06	Dec 05	Jan 23
First Steps Toward Agility	Oct 20*	Nov 15				
Kanban Fundamentals / Kanban 101	Nov 10		Dec 10			
Project Management Fundamentals	Nov 02-03		Oct 01-02		Dec 06-07	Jan 24-25
Business Requirements Gathering for Agile Projects	Sept 29 Dec 08	Oct 10	Nov 03			

\*to be delivered in collaboration with PMI KC Mid-America Chapter

Visit <https://refinem.com/training/public> for more details.