

VFID Whatfix Scrum Playbook

When to use the Playbook

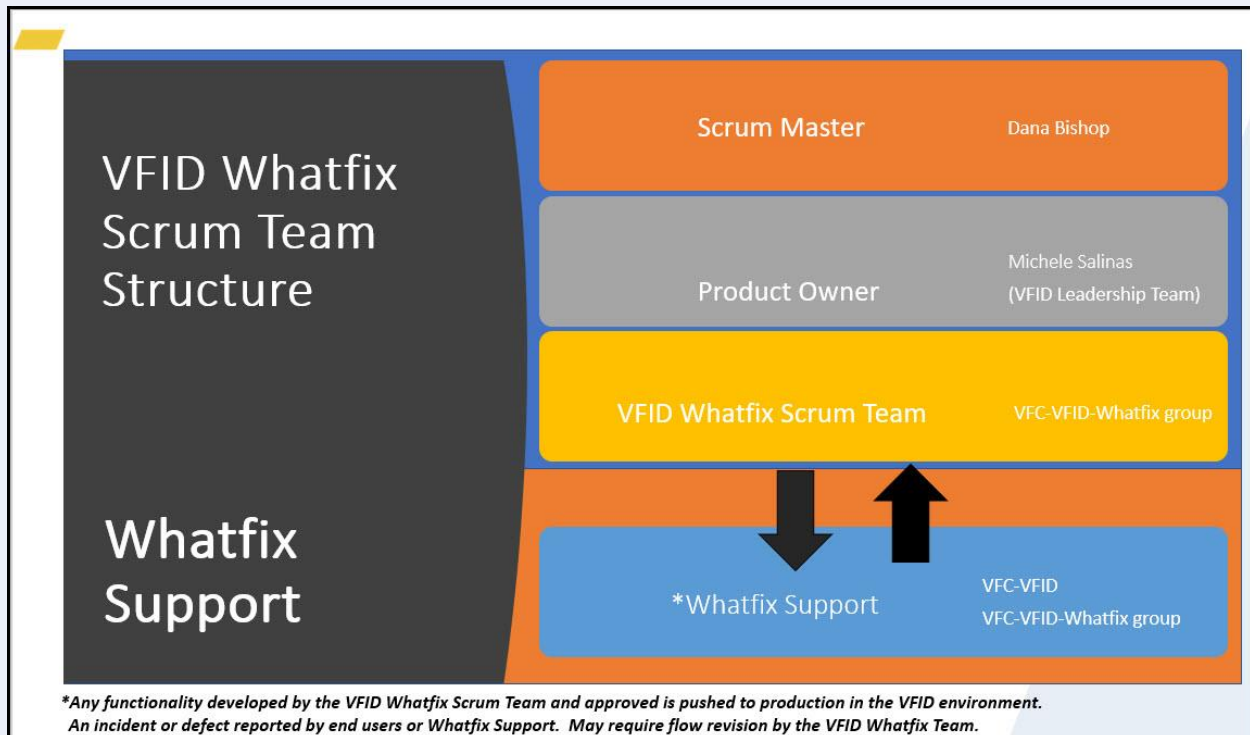
- Understanding the roles and responsibilities of VFID Whatfix team members supporting the Whatfix goal
- Preparing for a Whatfix release/push to production
- Completing scrum work for Whatfix
- Leadership visibility to Whatfix delivery

Who should use and refer to the Playbook?

- VFID Whatfix Team members
 - Scrum Master
 - Product Owner
 - Whatfix Content Developers – VFID Internal Team/Whatfix Professional Services
 - QA/UAT

VFID Whatfix Agile Scrum Model

The following information is a high-level description of the VFID Whatfix Agile Scrum Model used by the VFID Whatfix team.



VFID Whatfix Agile Scrum Process Flow

1. Product Owner gathers work intake from business stakeholders
2. Product Owner collaborates with Whatfix analysts to decide needed scrum stories (widgets to be created) for the **VFID Whatfix Product Backlog**.
 - **Note:** For new VFID development, reference the VFID scrum story. A VFID scrum story may have a Whatfix flow (new or revised). A task will be added to that VFID story for the Whatfix workflow.
3. **VFID Whatfix Product Backlog** is groomed and prioritized by the Product Owner.
4. The Product Owner will notify the Scrum Master when a ready scrum story from the **VFID Whatfix Product Backlog** should be assigned to a Whatfix Analyst to work on (**VFC-VFID-Whatfix group**).
5. **Push to Production Whatfix** flows will be documented in the VFID Release notes
 - Loop Release Notes are [here](#).
 - Send communication to VFID Release notes publisher.
 - Whatfix Push to prod steps.
 - Dana B and Laura AllenA. will be authorized to push Whatfix flows to production.
 - **Important Note:** Only the main or primary flows will need the “Prod” tag. All branches to main flows do not need to have the “prod” tag added. Refer to Whatfix Push to prod steps.

VFID WhatFix Team Scrum Ceremonies

Ceremony	Explanation	Who Attends?	Artifact link (where applicable)
Push to Prod Planning	Push to Prod Planning determines widgets (i.e., workflows, pop-ups, beacons, etc.) to be included in a Whatfix push to production. This will include the development and UAT.	Scrum Master Product Owner Whatfix Analyst (VFC-VFID-Whatfix group)	Push to prod steps.
Weekly Scrum	Weekly Internal Whatfix team meeting	Scrum Master Product Owner Development Team	Whatfix Agile Board is used to track the project work. The Whatfix Product Backlog is used to select widgets (i.e., flows, pop-ups, beacons, etc.) to work on.
Operational Readiness Review (ORR)	The ORR serves as a demo held by the VFID WhatFix team and takes place before moving a widget to production. All tasks within a scrum story must be completed before scheduling an ORR.	Scrum Master Product Owner Whatfix Analyst Any other relevant stakeholders *Whatfix ORR approver will be Michele Salinas *The VFID Leadership team should be invited to	Click here to for a list of steps for ORR.

		ORR for major/new workflows.	
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Team Structure - Scrum Roles & Responsibilities

Scrum Team Role	Name	Responsibility (i.e., project tasks, communications, TSA deliverables)
Scrum Master	Dana Bishop	<ul style="list-style-type: none"> Leads the following scrum ceremonies: <ul style="list-style-type: none"> Push to production planning Weekly Scrum meeting Prepares Kanban board for Whatfix work. Ensures scrum stories are ready Ensures each scrum story has the appropriate tasks (DEV, UAT/QA, ORR) Removes impediments Schedules and coordinates Operational Review Readiness (ORR)
Product Owner	Michele Salinas	<ul style="list-style-type: none"> Works with stakeholders to identify business needs for workflows/dev work. Identifies workflows needed Assigns stories to VFC-VFID-Whatfix group
VFID Whatfix Scrum Team		
Business Analyst/s	VFC-VFID-Whatfix group	<ul style="list-style-type: none"> Gathers and writes comprehensive requirements to create a scrum story Ensures acceptance criteria are testable Develops a working increment (widget/flow) based on the user story requirements Updates scrum story and scrum tasks with status before each weekly scrum call Notifies Scrum Master of impediments to meeting story due dates Ensures widget development matches story requirements and design Ensure all updates are completed prior to Operational Review Readiness (ORR).
User Acceptance Testing	VFC-VFID-Whatfix group VFID Champion Testers (once internal testing is complete, champions test using our feedback survey).	<ul style="list-style-type: none"> Conducts UAT against acceptance criteria in the scrum story Aligns test cases to acceptance criteria Assigns UAT due date to testing tasks and adheres to meeting targeted due date Regression testing in pre-prod and production

User Story Flow

Step	Start and End State	Assigned to	Tasks
1. Create Story	Start State: Draft End State: Draft	BA/Story Writer/ VFC-VFID-Whatfix group	<ul style="list-style-type: none"> ○ Create a scrum story in Service Now for the flow. Stories for Whatfix can be created from the 'Create Story' button from the Whatfix Product Backlog. Click here for a sample Whatfix story. ○ Create scrum tasks required (coding, documentation, and/or testing). ○ Enter the VF Analyst name in the Assigned to field ○ Add acceptance criteria ○ Assign story to Product Owner for review and prioritization
2. Prioritize	Start State: Draft End State: Draft	VF Leader (Michele S)	<ul style="list-style-type: none"> ○ Accept Story ○ Decision to proceed or cancel ○ If proceed, assign story to ScrumMaster
3. Planning	Start State: Draft End State: Ready	Scrum Master (Dana B)	<ul style="list-style-type: none"> ○ Confirm story is complete (testing criteria, scrum tasks, etc. ○ Assign Dev/QA tasks to Whatfix Developer/VF Analyst. ○ Create the task card to track each scrum story on the Whatfix Scrum Board. Link scrum story to the appropriate card.
4. Build	Start State: WIP End State: WIP	VFC-VFID-Whatfix group	<ul style="list-style-type: none"> ○ Whatfix analyst works scrum task to meet task due date ○ Update task progress with a work note before each weekly meeting until task is complete ○ DEV task complete; DEV notifies QA/UAT to begin task to meet task due date.
5. UAT/QA	Start State: Ready for Testing End State: Complete, Cancelled, or Testing Failed	VFC-VFID-Whatfix group	<ul style="list-style-type: none"> ○ UAT works scrum task to meet task due date ○ UAT Update task progress with a work note by each week until task is complete ○ Update scrum task with test results ○ Update user story state based on test results to Complete or Testing Failed. ○ <i>Note:</i> If a defect is raised that cannot be completed in the

Step	Start and End State	Assigned to	Tasks
			current sprint, notify BA to create a new story.
6. Regression testing (pre-production/prod)		VF/WhatFix Internal Team	<ul style="list-style-type: none"> ○ Conduct regression testing of key functionalities in pre-prod environment ○ Conduct regression testing of key functionalities in production after implementation
7. Documentation			<ul style="list-style-type: none"> ○ Operations training ○ End user training ○ Documentation handed to support team/KB articles ○ Loop Release Notes are here (Demo with Champions)
8. Operational Readiness Reviews (ORR)	Final State: Complete	Scrum Master	<ul style="list-style-type: none"> ○ Scrum Master schedules the ORR meeting
		VFC-VFID-Whatfix group (Analyst)	<ul style="list-style-type: none"> ○ Provides scrum master a high-level description of the story requirements to be added to ORR meeting invite ○ Confirms story requirements traceability to testing results, add a work note confirming same
		VFC-VFID-Whatfix group (Analyst)	<ul style="list-style-type: none"> ○ Provides a list and conducts a walkthrough of affected components (code, screens, and functionality, etc.) ○ Provides testing results start to finish ○ Demonstrates the before/after functionality of differences (i.e., current screen shots and post deployment) ○ Confirms back-end work and preparation is done prior to start of ORR
9. Story Completion	Final State: Complete or Cancelled	Scrum Master	<ul style="list-style-type: none"> ○ Scrum Master confirms story and task state and work notes are correctly updated. ○ Scrum Master confirms approved or not approved for release, based on ORR results.
		BA	<ul style="list-style-type: none"> ○ If more work is required for this story, a new story will be created by BA for the future,

Step	Start and End State	Assigned to	Tasks
			related as a dependency to the completed story.

VFID Whatfix Scrum Artifacts

VFID WhatFix Scrum team artifacts may include but are not limited to the following: (links and sample documents are attached where appropriate)

- **VFID Whatfix Tracking**
 - This release record includes all activity related to Whatfix (i.e., flows, code) when a story needs to be created.
 - One release record has been created for Whatfix workflows.
- **Whatfix Development Dashboard**
 - VF Whatfix Analysts develop workflows from the application.
- **Whatfix Reporting Dashboard**
 - This dashboard provides metrics on the current state of Whatfix development.
- **Whatfix Product Backlog.**
 - This is a listing of all development stories for the product.
 - The scrum stories in the **VFID Whatfix Product Backlog** are to be developed next based on Product Owner prioritization. Stories moved out of this release record are assigned to an analyst by the Product Owner. Once a scrum story is complete or canceled, it no longer will appear in this list.
 - All stories in this list are prioritized by the Product Owner.
- **Whatfix Scrum Stories**
 - Whatfix stories must be created in VFID under the Product **VFID-WHATFIX** and under the Epic entitled **WhatFix Workflows**. The sprint field should always be blank. The assignment group is **VFC-VFID-WHATFIX**. The scrum story should be assigned to an analyst in the VFC-VFID-WHATFIX group.
 - [Here](#) is an example Whatfix scrum story.
- **Whatfix Team Kanban board**
 - Kanban board is updated by Scrum Master on an as-needed basis.
 - Cards on the Kanban board are linked to the Whatfix scrum stories. Because the Kanban board is not able to link to the Whatfix scrum stories created, a link to these stories must be included in the card tasks created for the Kanban. The Kanban board stories are linked to the assignment group VFC-VFID-WHATFIX and are assigned to a resource in the assignment group **VFC-VFID-WHATFIX**.
 - [Here is an example](#) of a Kanban board card created for a story.
 - It is expected that scrum team members assigned to stories are updating the story notes and scrum story tasks each week prior to the weekly Whatfix scrum meeting.
- VFID Whatfix Scrum team will determine if additional artifacts are required.