

Backlog Refinement Facilitator Checklist

Preparation Checklist

- ☐ Schedule time for Backlog Refinement each iteration on a regular cadence
- ☐ The Product Owner gathers relevant information and inputs for discussion
- ☐ Invite any subject matter experts who may have information about the stories to be discussed
- ☐ Ensure the team work management tool or team board is up to date
- ☐ Gather sharpies, sticky notes, and estimation poker cards
- ☐ Prepare needed inputs
 - ☐ Current team backlog
 - ☐ Features, PI Objectives, and dependencies with other teams
 - ☐ Candidate Stories for the next Iteration
 - ☐ Team backlog capacity allocation

Expected Outputs to Backlog Refinement

- ☐ Estimated Stories with acceptance criteria ready for the next Iteration
- ☐ Identified dependencies are either resolved or an action to follow-up is determined
- ☐ Spikes for further investigation
- ☐ Current plan risks and impediments have been surfaced and discussed

Actions to take from Backlog Refinement

- ☐ Update work management tool or team board
- ☐ Product Owner updates the Product Manager and the Release Train Engineer (RTE) on any changes which impact delivery of PI Objectives
- ☐ Notify other teams of any changes, dependencies, or risks that affect them

Tips and Techniques

- Timebox the discussion of each Story to 5 minutes. After the timebox, check if more time is needed
- Make sure all the team members participate
- Manage and promote healthy disagreement and discussions on backlog items
- Record all decisions, User Story refinements, and impediments discussed
- Invite the right subject matter experts and hold the event at regular intervals
- Ensure Stories are well written and appropriately sized
- The Product Owner is made aware of Enabler Stories generated by the team
- Avoid arriving to the Iteration with Stories lacking acceptance criteria