

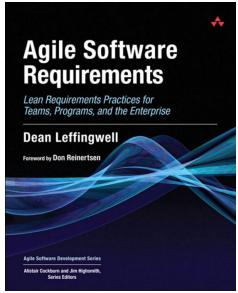


CE Department

Software Requirements Engineering

40688

These slides are designed to accompany Agile Software Requirements (2011) by Dean Leffingwell and support the university course Software Requirements Engineering, instructed by Mehran Rivadeh. Created and designed by Mahnaz Rasekhi.



Agile Software Requirements (2011)

Dean Leffingwell

Vision, Feature, And Roadmap

Chapter 13

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Software Requirements Engineering

October 2025 - Fall 1404 - SUT

Contents

1. Vision
2. Expressing The Vision
3. Features
4. Estimating Features
5. Testing Features
6. Prioritizing Features
7. The Roadmap

Introduction

Introduction

Vision

- How to continuously communicate the strategic intent of the program?
- What are some approaches for communicating and documenting this critical information?

Feature

- The primary content of the Vision is a set of features.
- How to formulate, estimate, and prioritize features to deliver the maximum value to our users?

Roadmap

- How we can see the future of the program unfolding, at least insofar as we can predict it?

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1. **Vision**

Vision

- Traditionally, the intended **requirements** for a product, system, or application were **captured** and **communicated in document form**.
- When properly applied, **documents** still **work great, even in agile**, and we can continue to use them for this purpose.
- However, the **investment in up-front requirements analysis** is **greatly reduced in agile**, and therefore the traditional MRDs, PRDs, SRSs, and the like are unlikely to appear.
 - ◆ Marketing Requirements Documents (MRDs)
 - ◆ Product Requirements Documents (PRDs)
 - ◆ Software Requirements Specifications (SRSs)

Vision

- Agile enterprises take a **leaner approach** better suited to
 - ◆ The last-responsible-moment
 - ◆ Delayed decision-making
 - ◆ and Artifact-light development practices.
- This **prevents overinvestment** in things we are **unlikely to understand very well** anyway and **prevents the too-early binding of resources** to a set of fixed commitments that are likely to haunt us later.
- This keeps the program agile and light on its feet.

Vision

What is the key factor that ensures agile teams understand what to build when formal documentation is missing?

- Since the MRD, PRD, and SRS documents may no longer exist to specify intended system behavior, **communicating the Vision directly to the agile development teams is even more critical.**
- Otherwise, how would they know what it is they are supposed to build?
- This is generally **executive's and product management's responsibility**, because the **Vision is an outcome of the company's business and portfolio investment strategy.**



Vision

Generally, the **Vision** communicates the strategic intent for the **program** and **answers** some of the **big questions**.

1. Why are we **building this product**, system, or application?
2. What **problem** will it **solve**?
3. What **features** and **benefits** will it provide?
4. For whom does it provide these features and benefits?
5. What **performance**, **reliability**, and **scalability** must it deliver?
6. What **platforms**, **standards**, **applications**, and so on, will it **support**?



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- c. The Preliminary Press Release
- d. The Feature Backlog With Briefing
- e. Communicating NFRs

Expressing The Vision

How the **Vision** is **communicated to** the teams is a matter of the **organization's preference**, and the mechanisms vary greatly.

- A vision document
- The advanced data sheet approach
- The preliminary press release approach
- The feature backlog with briefing approach
- Communicating nonfunctional requirements (System qualities)

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A Vision Document

- Writing things down is still the best way to communicate
 - ◆ when face-to-face is impractical
 - ◆ when key decisions and discoveries need to persist over time.
- For example, in RUP, the Vision document is a key, well defined artifact that teams used to communicate the components of the Vision.
 - ◆ It is an easy carryover to a team's agile practices.
 - ◆ This approach used to **good effect on relatively small teams of 10 to 15 team members.**
 - ◆ Their belief is: “We document the Vision to test our own understanding of what we think we know.”



A Vision Document

- In larger programs, the **Vision** document serves as the “umbrella” document for a **large system initiative**.
- With respect to agility, it is important to note that typically only one such **document of 5 to 10 pages (20 maximum for a large system)** is needed, even for a **large green-field program**.
- So developing and updating this document is not a burdensome overhead.



Template → Book - Appendix B

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The Advanced Data Sheet

- For product-oriented companies, the **development** of the **business case** for a new product **requires** an **understanding** of
 - ◆ The user's needs
 - ◆ The key benefits a proposed solution is to provide
 - ◆ The platforms and operating environments that must be supported in the user's environment
 - ◆ and The key labeling claims for performance, compatibility, and so on.

The Advanced Data Sheet

- Moreover, the need for the **product team** to be able to articulate the **business case** in a concise manner to prospective buyers is also imperative:
 - ◆ If this cannot be done effectively, the product value proposition is likely to be lost on the marketplace, regardless of the team's ability to produce a worthy offering.
- Also, since the role of product management is well understood by these teams, one or more individuals on that team will eventually need to **communicate the product boundaries and features**.
- One way to do that is with the **development** of a very **preliminary, advanced data sheet**.

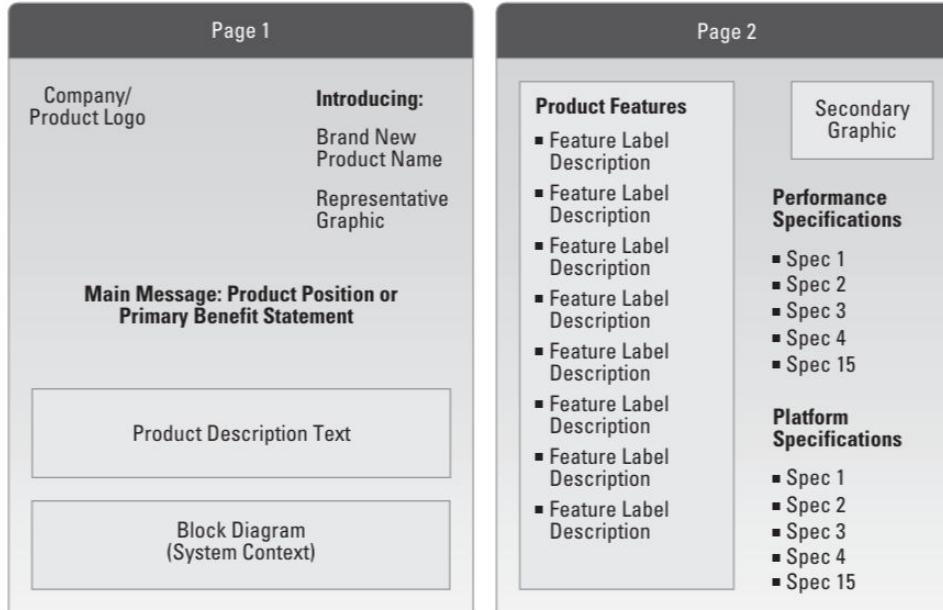
The Advanced Data Sheet

- Development of a very preliminary, advanced data sheet
- It isn't an actual data sheet per se, but it uses a data sheet template to start to define, at a high level:
 - ◆ What the product does?
 - ◆ For whom it is intended to do it?
- It is an extremely concise document.
- Two pages front and back are typical.
- It must focus on what is critical to communicate.



Source: Ping Identity, Ping Federate Data Sheet

The Advanced Data Sheet



→ Although this data sheet appears to be very simple on the surface, teams will quickly discover that drafting the data sheet is, in fact, a fairly difficult exercise but one that forces development of an early and concise common Vision for the team.

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The Preliminary Press Release

- Some teams have found that drafting a preliminary, hypothetical press release causes them to **think through the Vision from the standpoint of the way the solution will be described to the market.**
- A press release has to tell a **complex story in a simple and compelling way**, a way that **clearly articulates the benefits to the prospective customers**, and they also know that they have **only two pages** to do it in.

News & Press

Ping Identity Unveils PingFederate Express

New Ultra-Lightweight Product Enables Secure SAML Single Sign-On in Minutes

Denver, Colo. — September 15, 2009 — Ping Identity® today announced PingFederate Express™, an Internet Single Sign-On (SSO) “endpoint” solution for Service Providers who need to quickly and cost-effectively establish a SAML connection with a PingFederate Identity Provider. PingFederate Express delivers enterprise-class performance, reliability and security, with no additional hardware, federated identity expertise or ongoing maintenance required.

Source: Ping Identity, Ping Federate Data Sheet

The Preliminary Press Release

- Having the team work with their marketing partners to draft a preliminary press release is a way to:
 - ◆ Foster early collaboration.
 - ◆ Illustrate that the development team can speak in the language of the customer community.
 - ◆ Paint the Vision in the minds of those key internal stakeholders who will become involved as the product approaches market readiness.

News & Press

Ping Identity Unveils PingFederate Express

New Ultra-Lightweight Product Enables Secure SAML Single Sign-On in Minutes

Denver, Colo. — September 15, 2009 — Ping Identity® today announced PingFederate Express™, an Internet Single Sign-On (SSO) “endpoint” solution for Service Providers who need to quickly and cost-effectively establish a SAML connection with a PingFederate Identity Provider. PingFederate Express delivers enterprise-class performance, reliability and security, with no additional hardware, federated identity expertise or ongoing maintenance required.

Source: Ping Identity, Ping Federate Data Sheet

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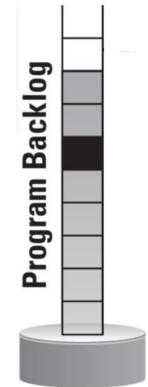
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The Feature Backlog With Briefing

- In even lighter-weight approaches, the backlog alone may be sufficient to communicate much or all of the Vision to the team.
- In this case, **product managers elaborate** far enough ahead to show the team **where the project is headed**, while simultaneously laying in **priorities** and **estimates** for future scoping of work.
- A reasonably well-formed and maintained **backlog**—in conjunction with a **face-to face Vision briefing** by the product managers or other business stakeholders to the development team—can be an **adequate way to communicate the Vision**.



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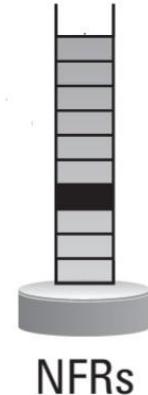
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Communicating NFRs

Nonfunctional Requirements (System Qualities)

- **Many nonfunctional requirements**, which are qualities of the system in use—as opposed to specific functional behaviors—**may be equally important to the Vision**.
- These NFRs communicate attributes such as the **usability, performance, reliability** and **supportability** requirements, imposed **standards, compatibility** requirements, and so on.
- In some fashion, these items must also be communicated to the teams as part of the Vision and captured for future consideration.



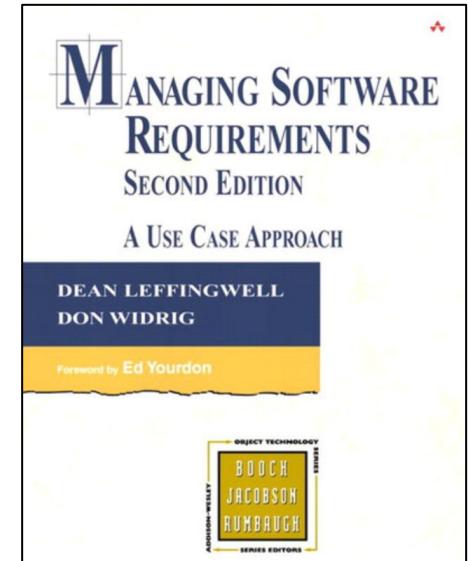
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Feature

- The primary content of the **Vision** is a set of prioritized features.
- They describe **what new things the system will do for its users**.
- **What benefits** the user will derive from them.
- It is more **abstract** and **higher level view** of the **system** of interest.

“Services provided by the system that fulfill one or more stakeholder needs.”



Feature

- They lived at a level **above software requirements** and bridged the gap from the problem domain to the solution domain
- Problem domain: understanding the needs of the users and stakeholders in the target market
- Solution domain: specific requirements intended to address the user needs

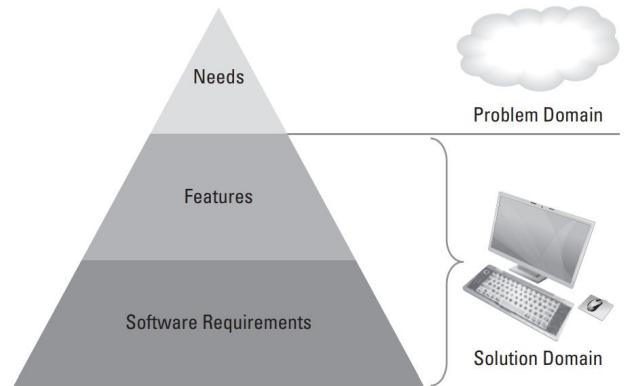


Figure 13–2 Requirements pyramid

Feature

- The word “feature or benefits” is:
 - ◆ Industry-standard norms to describe products.
 - ◆ The **language** typically used by **marketing** to describe the **capabilities** and **benefits provided** by a **new system**.
- Familiar construct in agile development bridge the language gap from the agile project team/product owner to the system/program/product manager level and give those who have traditionally operated outside our agile teams a traditional label (feature) to use to do their traditional work (describe the thing they'd like us to build).

Feature

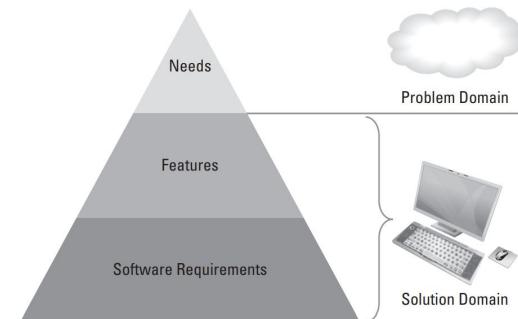
Example:

A feature of a word processor is → spell checking as you type

Expressing Features in User Story Form:

“As a writer, I can get automatic notification of spelling errors as I write so that I can correct them immediately.”

- The user role and benefit are more clearly described.
- However, they do look just like user stories, although they are written at a higher level of abstraction.



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Estimating Features

User Story Estimation → Review

- Teams typically estimate user stories using an **abstract, relative estimating model** based on **story points**.
- Story points can be measured in the abstract (unit-less but numerically relevant) or as ideal developer days (**IDDs**), with the abstract measure being the most common.
- The aggregate amount of story points that a team can deliver in the course of an iteration is the team's **velocity**.
- When a team's size changes or vacations or holidays occur, the team adjusts the expected velocity accordingly.

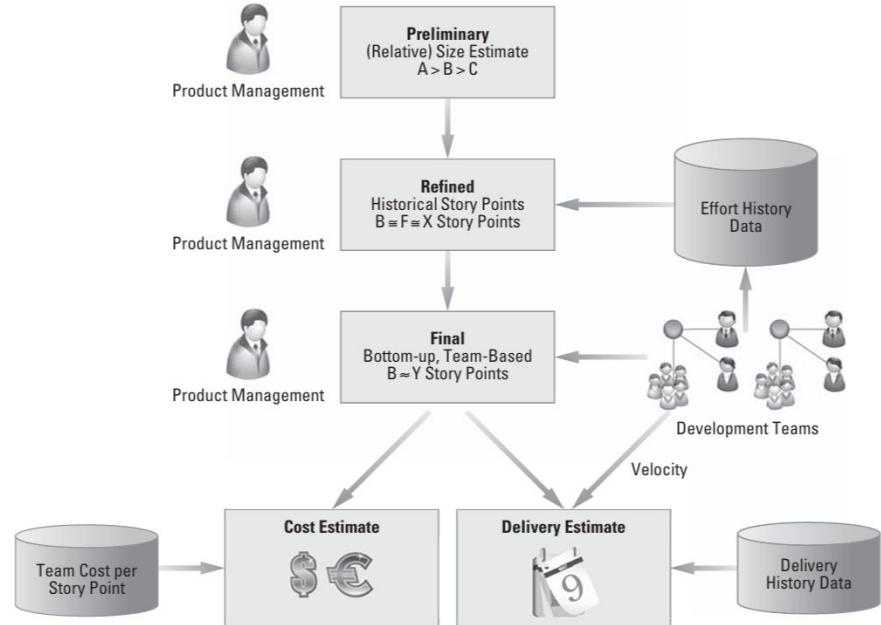
Estimating Features

User Story Estimation → Review

- If the system and organizations are largely stable, after some number of iterations, teams will generally have a fairly reliable velocity.
- That allows them to make intelligent commitments for each iteration.
- It also provides the basic mechanism we need for estimating at the program/release level.

Estimating Features

- Depending on where the item is in the program backlog and how important the estimate is, the **estimate for a feature** may go through a **series of preliminary, refined, and final estimates**.



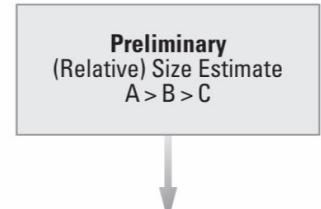
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Estimating Effort

Preliminary: Gross, Relative Estimating

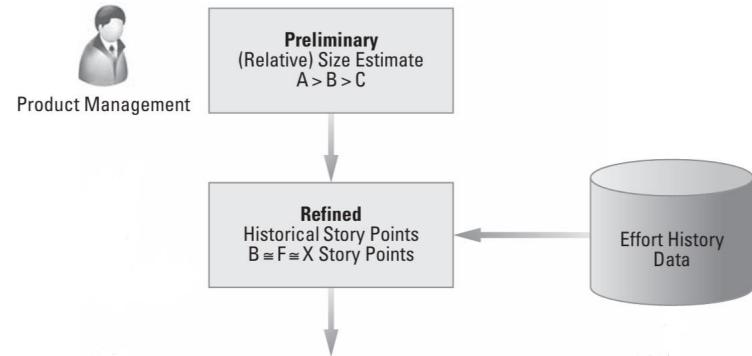
- The product management team may simply need a rough estimate of the effort to implement a feature, even before discussion with the teams.
- They can simply use **relative estimating** mode.
 - ◆ The “bigness” of each backlog item is simply estimated relative to others of the same type.
- It is a **simple and fast estimating heuristic**.
- It can be used for the **initial scoping and prioritization** of work.
- (But again, only relative)



Estimating Effort

Refined: Estimate In Story Points

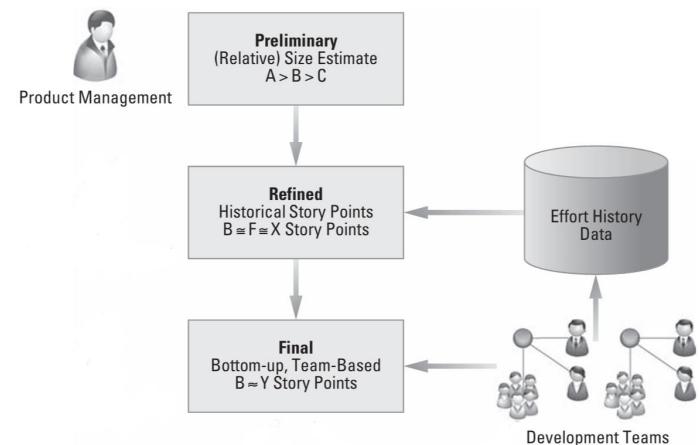
- We need **tracking** information.
- Many agile project management tools support the **feature-to-story hierarchy**.
- A simple **comparison** of the **new feature** to the **expended story points** for a **similar size feature** provides this **first refinement**.



Estimating Effort

Final: Bottom-Up, Team-Based Estimating

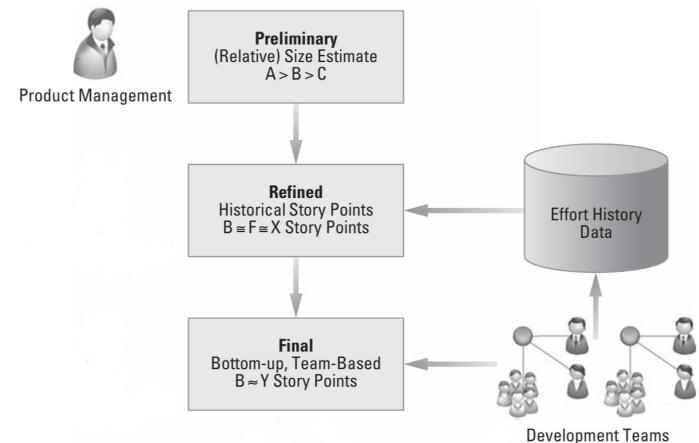
- The estimates so far require only a minor time investment and can be done by the product management team in isolation.
- That can be appropriate, based on the stage of the feature.
- However, for any meaningful estimate, the fidelity of the estimate can be significantly improved by having the estimating done by the teams.



Estimating Effort

Final: Bottom-Up, Team-Based Estimating (Cont.)

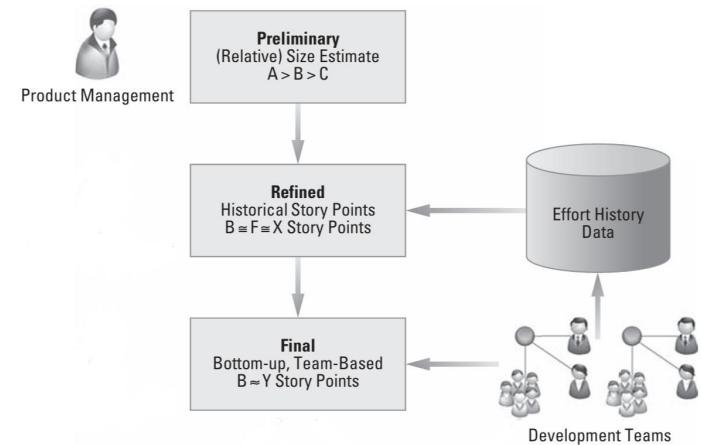
- In any material program, there will be multiple teams, and they may or may not be affected by the new feature.
- Sometimes, only they know whether their module, feature, or component is impacted.
- Therefore, only they can actually determine a more responsible estimate.
- They will typically have their own history of like features—and the story points required to complete them—in their project management repository.



Estimating Effort

Final: Bottom-Up, Team-Based Estimating (Cont.)

- However, since ad hoc requests for estimating interrupts the team from their daily iteration activities, the estimating task is most efficiently done on a cadence.
- We described the semiweekly feature preview meeting, which is designed, in part, for just this purpose.



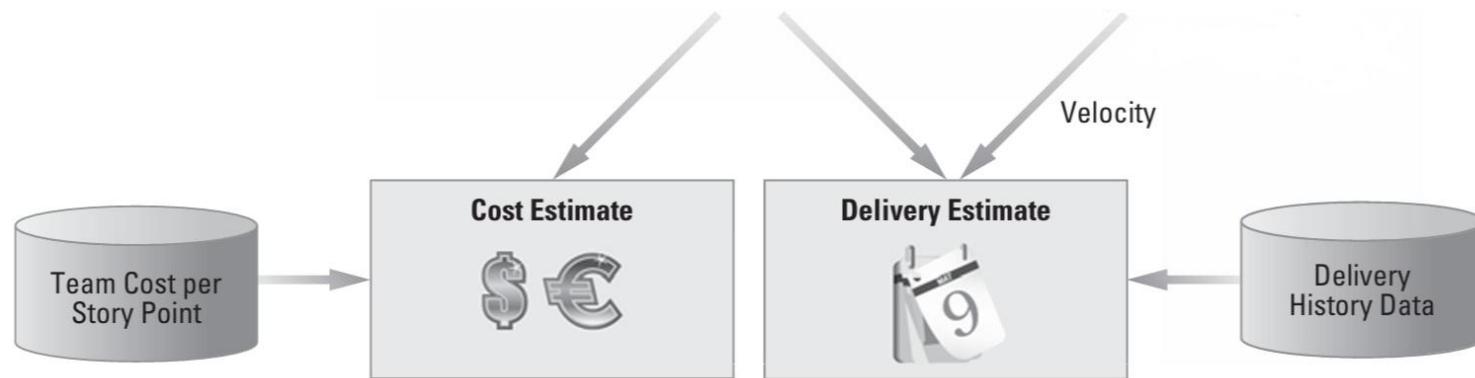
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Estimating Cost

- Once the feature has been **estimated** in the currency of **story points**, a **cost estimate** can be quickly **derived**.
- Although the development teams themselves may not have ready knowledge of the cost of a story point, at the Program level it is fairly straightforward to calculate one.
- Simply look at the **burdened cost per iteration timebox** for the teams that provided the **estimates**, and **divide that by their velocity**.
- This gives an **estimate** of the **cost per story point** for the **subject teams affected** by the **new feature**.

Estimating Cost



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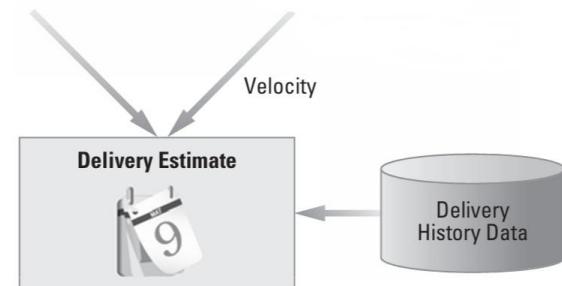
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Estimating Development Time

- Given an understanding of what percentage of the team's time the program is willing to devote to the new feature, we can also use historical data to predict how long it will take to deliver.

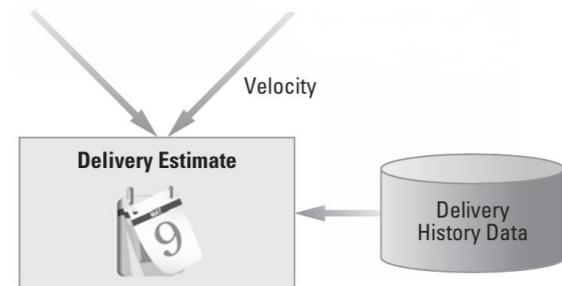
Example: Let's assume:

- **Feature A** was implemented in about **1,000 story points** and took **three months**.
- And **feature B** is a little bigger, then **feature B** will take a little more than three months, assuming similar resource allocations and availability.



Estimating Development Time

- As a further refinement, the **program** can also look at the **current available velocity** of the affected teams, **make some assumptions** about percentage time allocation, and **derive a better time and schedule estimate** from there.



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Testing Features

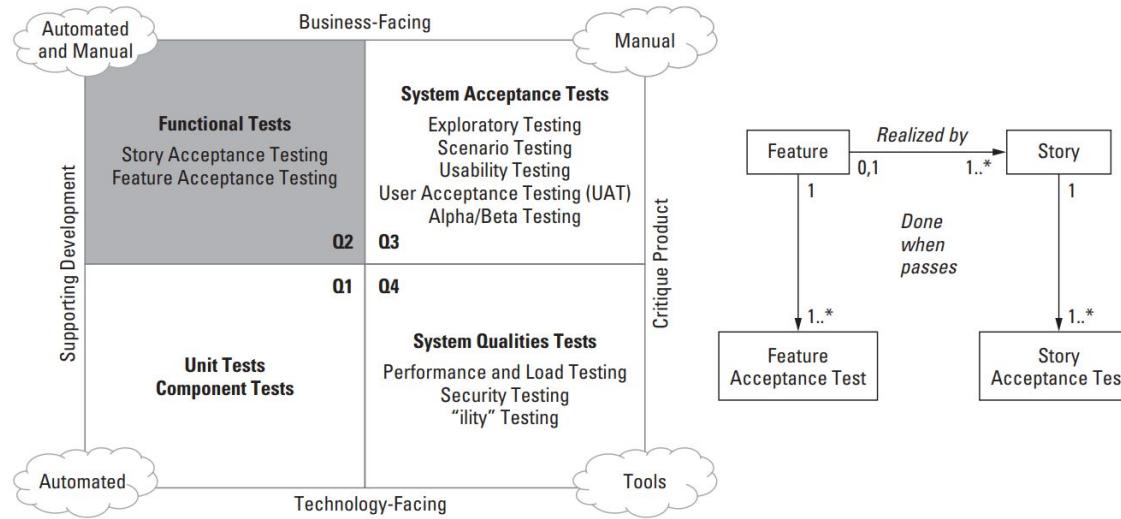


Figure 13–4 Feature testing in the agile testing matrix and the agile requirements model

Testing Features

- For teams that are **organized by feature**, this testing can be done **by the team** that implements the feature.
- If the teams are **organized around components**, then much of this testing is likely to be **done by the system team**.
- In either case, however, there are likely to be some spanning features that touch multiple feature and component teams; testing of those features is often done under the purview of the **system team**.
- As with stories, feature tests may be **manual or automated**, with **automation** being the **preferred** approach.

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Prioritizing Features

- “Please tell me what your priorities are so I’ll know what I don’t have to work on.”
 - ◆ Developer says to the product manager.
- One of the biggest challenges that all software teams face is **prioritizing requirements** for implementation and **delivery** to the customers.
- **Small decisions** can have **big impacts** on **implementation cost** and **timeliness of value delivery**.

Prioritizing Features

Why Prioritization Is Such A Hard Problem?

- **Customers** are seemingly **reluctant** to prioritize features.
- **Product managers** are often even **more reluctant**.
- **Quantifying value** is extremely **difficult**.
- We admit up front that we **can't implement** (nor even **discover**) **all potential requirements**.
 - ◆ After all, we typically have fixed quality, resources, and delivery schedules.
 - ◆ Therefore, the only variable we have is scope.
- **Effective prioritization** becomes a mandatory **practice** and **art**—one that must be mastered by every agile team and program.

Prioritizing Features

- There is certainly **no one right way to prioritize**, and teams will benefit from differing perspectives on this unique problem.

$$\text{Relative Priority} = \text{Relative ROI} = \text{Relative } \frac{\text{Value}}{\text{Cost}}$$

- If we could simply **establish value and cost** (if not in absolute terms, then at least relative to other features), then **we have a way to prioritize based on economics**.
- After all, who wouldn't want to deliver a higher ROI feature before a lower ROI feature?
- That seemed to make totally intuitive and (apparently) economical common sense.

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Prioritizing Features Based On The Cost Of Delay

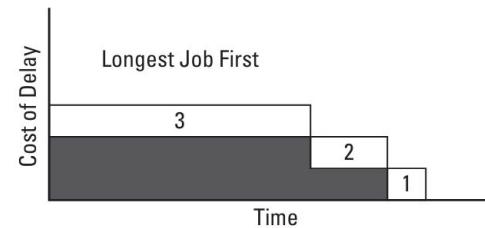
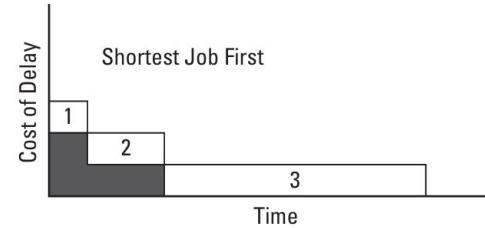
Reinertsen: “*If you only quantify one thing, quantify the cost of delay.*”

- Because we have already outlined an estimating strategy, we'll actually be able to quantify two things:
 1. The feature effort estimate
 2. The cost of delay
- Reinertsen describes three methods for prioritizing work based on the economics of CoD:
 1. Shortest job first
 2. High delay cost first
 3. Weighted shortest job first

Prioritizing Features Based On The Cost Of Delay

Shortest Job First

- When the cost of delay (CoD) for two features is equal, doing the **Shortest** (in our case, smallest) **Job First**, produces the **best economic returns.**



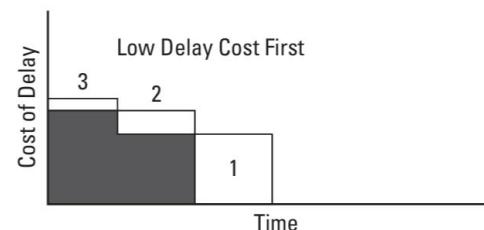
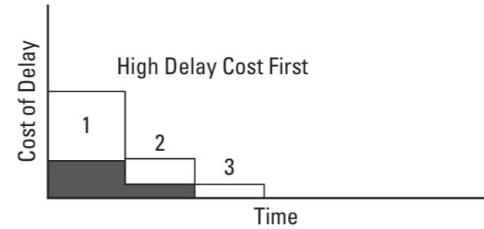
Feature	Effort	Cost of Delay
1	1	3
2	3	3
3	10	3

Delay Cost

Prioritizing Features Based On The Cost Of Delay

High Delay Cost First

- If two features have the same CoD, do the smallest feature first.



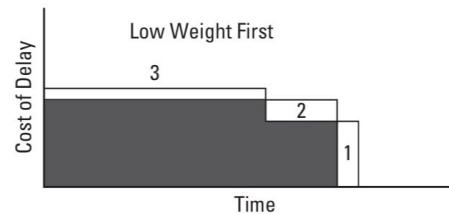
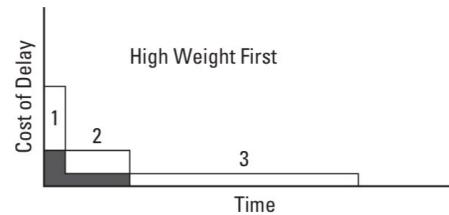
Feature	Effort	Cost of Delay
1	3	10
2	3	3
3	3	1

Delay Cost

Prioritizing Features Based On The Cost Of Delay

Weighted Shortest Job First

- If two features have different efforts and CoD (and they almost always do), do the weighted, smallest effort feature first.



Feature	Effort	Cost of Delay	Weight = CoD/Effort
1	1	10	10
2	3	3	1
3	10	1	0.1

Delay Cost

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Estimating The Cost Of Delay

How Does One Go About Calculating The Cost of Delay For A Feature?

- We suggest that **CoD** is an **aggregation** of **three attributes** of a **feature**, each of which can be estimated fairly readily, when compared to other features.
 - ◆ User value
 - ◆ Time value
 - ◆ Risk reduction value

Estimating The Cost Of Delay

How Does One Go About Calculating The Cost of Delay For A Feature?

→ **User Value:**

- ◆ It is simply the potential **value** of the **feature** in the **eyes** of the **user**.
- ◆ **Product managers** often have a good sense of the **relative value** of a **feature** (“they prefer this over that”), even when it is impossible to determine the absolute value.
- ◆ And since we are prioritizing like things, relative user value is all we need.

Estimating The Cost Of Delay

How Does One Go About Calculating The Cost of Delay For A Feature?

→ **Time Value**

- ◆ It is another relative estimate, one based on **how the user value decays over time**.
- ◆ Many features provide higher value when they are delivered early and differentiated in the market and provide lower value as features become commoditized.
- ◆ In some cases, time value is modest at best (implement the new UI standard with new corporate branding).
- ◆ In other cases, time value is extreme (implement the new testing protocol prior to the school year buying season), and of course there are in-between cases as well (support 64-bit architectures as soon as our competitors do).

Estimating The Cost Of Delay

How Does One Go About Calculating The Cost of Delay For A Feature?

→ **Risk Reduction**

- ◆ One that acknowledges that what we are really doing is software research and development.
- ◆ Our world is laden with both risk and opportunity. Some features are more or less valuable to us based on how they help us unlock these mysteries, mitigate risk, and help us exploit new opportunities.
- ◆ For example, move user authentication to a new web service could be a risky effort for a shrink wrapped software provider that has done nothing like that in the past, but imagine the opportunities that such a new feature could engender.

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Feature Prioritization Matrix

	Cost of Delay				Effort	WSJF
	User	Time	Risk Red.	Total		
Feature A	4	9	8	21	4	5.3
Feature B	8	4	3	15	6	2.5
Feature C	6	6	6	18	5	3.6

Legend:

Scale: 10 is highest, 1 is lowest.

Total is sum of individual CoD.

WSJF (weighted result) is calculated as Total (Cost of Delay) divided by Effort.

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Achieving Differential Value

The Kano Model of Customer Satisfaction

- Noriaki Kano, an expert on the field of quality management and customer satisfaction, developed a model for customer satisfaction that also challenged some traditional beliefs.
- Specifically, the **Kano model challenges the assumption that customer satisfaction is achieved by balancing investment across the various attributes of a product or service.**
- Rather, **customer satisfaction can be optimized by focusing on differential features, those “exciters” and “delighters” that increase customer satisfaction and loyalty beyond that which a proportional investment would otherwise merit.**

Achieving Differential Value

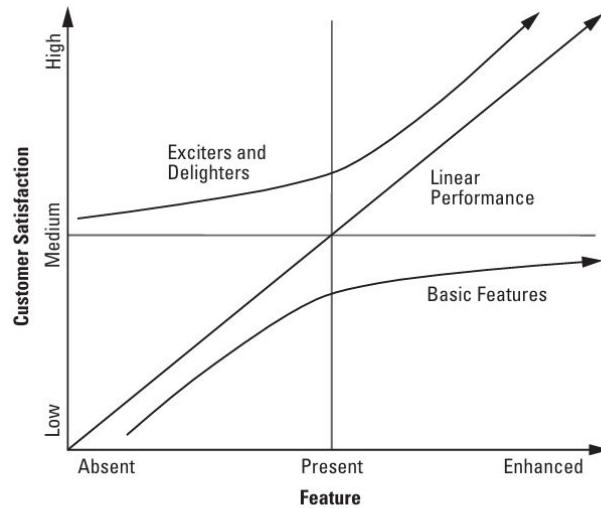


Figure 13–8 Kano model of customer satisfaction

Achieving Differential Value

Prioritizing Features For Differential Value

Given Weighted Shortest Job First prioritization model, what additional benefit we can derive from Kano's thinking?

- Differential value rule #1:
 - ◆ **Invest in MMFs**, but never overinvest in a feature that is already commoditized.
- Differential value rule #2:
 - ◆ **Drive innovation** by having the courage to invest in excitors.
- Differential value rule #3:
 - ◆ If resources do not allow you to **compete** on the current playing field, **change the playing field**.

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The Roadmap

- In order to set priorities and plan for implementation, we need an additional perspective, a product Roadmap that provides a view we can use to communicate future objectives to our outside stakeholders.

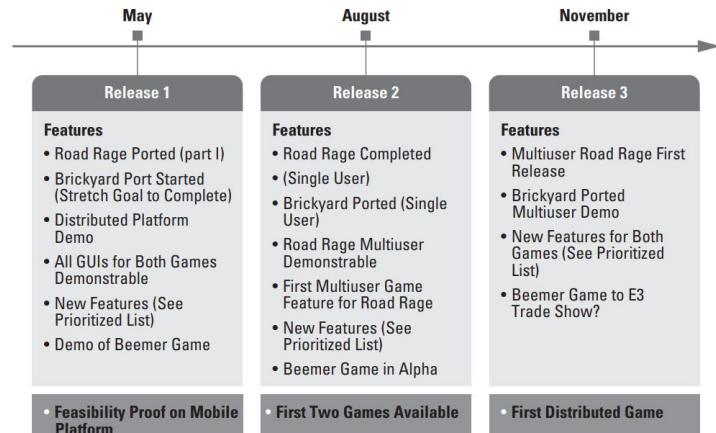


Figure 13–9 Roadmap—a themed, prioritized “plan of intent”

The Roadmap

- Each vertical box represents an **upcoming release** (or PSI).
- The **label at the bottom** represents the **theme** or **primary objective** of the release.
- The **features** are listed in **prioritized order**.
- The **dates, themes, and quality** for the **next release** are **fixed**.
- The **features** are **prioritized and variable**.

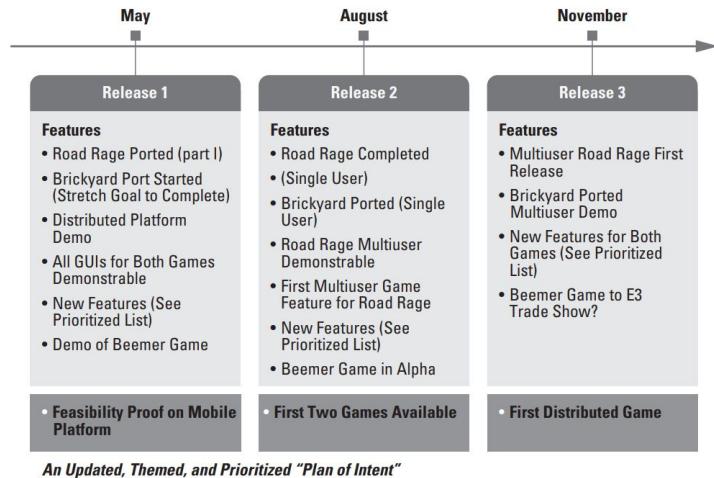


Figure 13–9 Roadmap—a themed, prioritized “plan of intent”

The Roadmap

- The teams can commit only to the features in the next upcoming release.
- Releases beyond the next represent only a best estimate.
- The Roadmap, then, is a “plan of intent” and is subject to change as development facts, business context, and customer needs change.

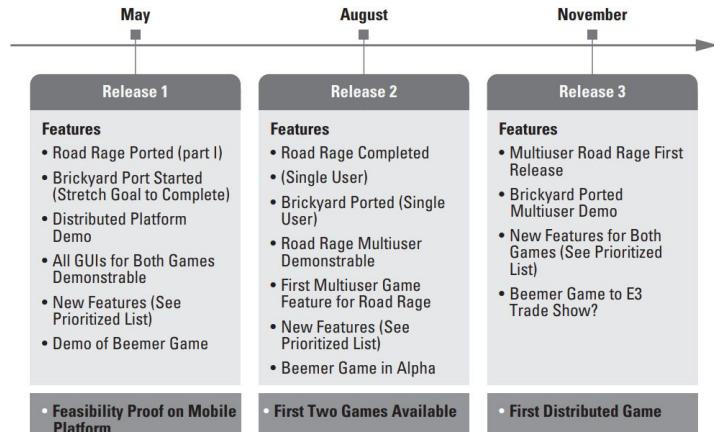


Figure 13–9 Roadmap—a themed, prioritized “plan of intent”

End of Chapter 13

Contributions

- Author of Reference Book: **Dean Leffingwell**
- Course Instructor: **Mehran Rivadeh**
- Slide Creator: **Mahnaz Rasekhi**
 - ◆ These slides are primarily based on Agile Software Requirements by Dean Leffingwell, with occasional adaptations to enhance clarity and engagement.