Affinity Sizing with a Distributed Team

Overview

Scrum teams use a technique called relative sizing to estimate their work. The most popular technique used for sizing is planning poker. However, there is another very useful method of sizing that is quicker and often more effective than planning poker, especially for teams that have many stories to size at any given time – affinity sizing.

Procedure (basically the app would need to replicate this):

* A large whiteboard or table is used – left side is labelled small, right side is labelled large
* Phase 1:
  + Stories (or whatever requirements a team works with) are printed out on paper, index cards or sticky notes
  + An initial story (doesn’t matter which one) is placed in the middle of the board as a starting point
  + Each member of the team takes a “turn” at sizing. For their turn, the team member can either:
    - Place a new story on the board relative to the ones that are on the board already
    - Move a story that is already on the board to a new spot (provided there are least 2 stories on the board)
    - Stories
      * To the left of things that are smaller than the story in play
      * To the right of things that are larger than the story in play
    - Underneath or above other stories that are about the same size
  + This repeats until all the stories are on the board
  + If a single story is moved more than 3 times, it is taken out play (usually by the faciliatory or Scrum Master)
* Phase 2:
  + At this point, all of the stories should be on the board and roughly lined up in columns of things that are about the same size
  + The team reviews the placement of the stories on the board and decides whether any stories should be moved, or whether columns should be consolidated
  + Ideally, the team will have 5 to 7 columns of stories on the board at this point
* Phase 3:
  + Sizes are assigned to each of the columns using whatever size range has been agreed on (usually a modified Fibonacci: 1, 2, 3, 5, 8, 13, 20, 40, 100)
    - Most of the time, the first column of stories uses the second number in the series – i.e. in the case of the modified Fibonacci the first column would probably be size 2
  + Items that were taken out of play because they were moved too many times are assessed and either sized using planning poker, or spikes are created to investigate the scope of work to ensure a common understanding of what’s being requested

This process works extremely well when everyone is in the same room. It’s much more difficult for geographically distributed teams. There are whiteboard apps that can be used to run a session like this, but as they are not designed for this purpose they require a lot of configuration and make the experience much less smooth than it could be.

User Stories

1. As a Scrum Master, I want to import cards from whatever tracking tool I use, so that I don’t have to waste time typing stuff that exists.
   1. Import csv or xml is fine
   2. Fields to be imported:
      1. Key (ticket id or equivalent)
      2. Issue type
      3. Summary (or title)
   3. An actual integration with Jira that allows querying through the app would be awesome
2. As a Scrum Master, I want to add new cards in the app, so that I can quickly add stories we’ve just discovered
   1. Fields to be allowed on entry:
      1. Key (optional)
      2. Summary/title (required)
      3. Notes (optional)
3. As a Scrum Master, I want to have multiple sizing sessions, so that I can use the tool with different teams
4. As a Scrum Master, I want my sessions to be saved, so that I can refer to the results later
   1. Should be able to name the sessions
   2. Dates and participants should be logged
   3. Other interesting metadata would be nice
      1. Length of session
      2. Number of stories sized
      3. Number of participants
      4. Average story size
      5. Distribution of sizes (# of 2, 3, 5 etc.)
5. As a Scrum Master, I want team members to be identified, so I know who is participating
   1. Person’s name is fine
   2. Can be entered by the Scrum Master in advance
   3. Can also be entered or edited by team members as they join
6. As a team member, I want to be able to easily join a session, so that I don’t waste time
   1. Account creation/sign-in not required nor desired, unless it can integrate with an IDP
   2. It’s okay for the Scrum Master or who ever sets up sessions to need an account
7. As a Scrum Master, I want to set an order of play, so that I can decide who plays when
8. As a team member, I want to know whose turn it is, so that I don’t get confused
9. As a team member, I want to know when it will be my turn, so that I can prepare
10. As a Scrum Master, I want to limit each team member to one move per turn, so that everyone participates
    1. One move = moving only one card
11. As a team member, I want to be able to change my mind about where I put my card before my team ends
    1. Player can put the card down and then move it again
12. As a Scrum Master, I want to replicate the experience of using a whiteboard as closely as possible, so that the sizing technique is effective
13. As a team member, I want to be able to move cards freely on the board, so that it’s easy to size things
14. As a Scrum Master, I want to prevent people from moving cards to some areas on the board, so that I can stay organized
    1. Separate area for cards taken out of play
15. As a Scrum Master, I want to be able to label the left and right sides of the board, so that I can set the ground rules for the game
16. As a team member, I want to access the rules of the game, so I understand what I need to do
17. As a Scrum Master, I want a story that has been moved more than 3 times to be automatically taken out of play so that we can review it in more detail later
18. As a Scrum Master, I want all unsized stories to be kept together in a separate location on the board, so we can see how much we must do
19. As a Scrum Master, I want all unsized stories to be visible, so that team members can see what they are sizing
20. As a Scrum Master, I want all unsized stories to be in a separate location on the board, so we can clearly see the work left to do
21. As a Scrum Master, I want all sized stories to be visible so that team members can see them
22. As a Scrum Master, I want to see real time progress of my session so I can manage my time appropriately
    1. # of stories unsized
    2. # of stories sized
    3. # of stories taken out of play
    4. Current running time of session
23. As a Scrum Master, I want to decide which sizing reference I’m using, so that I have flexibility
    1. Modified Fibonacci (1,2,3,5,8,13,20,40,100)
    2. Fibonacci (1,2,3,5,8,13,21,34,55,89)
    3. Powers of 2 (2,4,8,16,32,64,128)
    4. T-shirt (xxs,xs,s,m,l,xl,xxl)
24. As a Scrum Master, I want to apply the sizing reference of my choice after all stories have been sized, so that I can validate the sizing with the team
    1. Size appears at the top of the column
    2. Would be nice if the size appeared on the card as well
25. As a Scrum Master, I want to decide where in my sizing reference to start, so that I have flexibility
    1. E.g. if using Fibonacci, I should be able to make the first column whatever number I decide, rather than it always needing to be 1.
    2. It should be smart enough to tell me if I’m starting too far into the series and I don’t have enough numbers left for all the columns
26. As a Scrum Master I want to add sizing notes to the cards, so that I can record any constraints or assumptions made during sizing
27. As a Scrum Master, I want to export the results of my session, so that I can use the data elsewhere
    1. CSV format is fine
    2. Export the following:
       1. Key
       2. Issue type
       3. Summary
       4. Size
       5. Sizing notes
    3. An integration with Jira that would allow the size field to be updated automatically would be super awesome
28. As a Scrum Master, I want to change the colour of the cards, so that I can have a visual indicator of the type of requirement
    1. Would be cool if it could change the card colour automatically based on the issue type
29. As a Scrum Master, I want to “write” on the board directly, so that I can make notes and stay organized
    1. Add text to the board
    2. Add arrows
    3. Add lines
    4. Delete stuff I’ve added
30. As a user, I want the board size to adjust based on the amount of content on the board
    1. Board should not be a set size, but rather be “infinite”
    2. Can pan to see other parts of the board
    3. Can zoom to look at things more closely
    4. Cards should always remain readable at normal zoom level – i.e. do not make the cards smaller to stay within a constrained board size