Estimation Guidelines

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Revision History

Version	Date	Prepared by / Modified by	Change Summary	Approved By	Approved On
1.0	3-May-2017	Sridhar	First Draft Made	Anitha T G	18-May-2017

1. Estimation Guidelines

In Story sizing, team does a comparative analysis between all of the stories for the project. For each story to be sized, do the following as a team (Product Owner, Scrum team and scrum master).

Identify base stories

First the team has to identify one or multiple base user stories against which the team would do relative sizing of the backlog. This reference story is picked from current product backlog or a different story which we have done earlier. But the important point is the understanding of this story is same among everyone on the team. Team should be confident of this base story.

Walk through the User Stories

Product Owner or designated person from the product owner will answer questions and provide explanation about what exactly this story entails.

Discuss and jot down things to be done when implementing this story

These can be bullet points on the story card or text in the "notes" section of a tool. This is best done by Scrum Master who can add these details as and when discussions are on.

The Questions the team can ask during estimation

- Design: What we have to learn before we can start work on this story?
- Coding: How much code will need to be written for this story? Have we written similar code before?
- Unit Testing: Will any special setup (e.g., mock objects) be required to unit test this story?
- Acceptance Testing: How much work is involved in helping the customer
- Automation: To automate tests for this story?
- Integration Points: Does this story have external dependencies?
- Expertise: Does anyone of us have done similar story before?

Create Sizing Units

There are two types of scales used for creating estimation matrices: the linear scale (1, 2, 3, 4, 5, 6, 7, …) and Fibonacci sequence numbers (0.5, 1, 2, 3, 5, 8, 13 …). There are many other methods like T shirt sizes etc., but here we will be going with the Fibonacci sequence of estimates.

Find some point of relative comparison

If this story is about the same amount of work as one you have already sized, give it the same number of points. If it is more difficult, give it a proportionally higher value. If this story is similar to another but less work in some way, give it a lower value.

Planning Poker Estimation Steps

- Each estimator gets a set of cards
- All estimators select the backlog items, discuss features and ask questions
- Each estimator individually rates the story points for the user story
- All the estimators reveal their cards with the story points on it
- Any differences between the estimators need to be addressed

Reach a consensus among entire team

Validate that your estimates are internally consistent among stories as you go along. The team should agree on the story points until the agreement the team should keep on discussing. In case not able to come out any agreement then go for voting.

All the discussion points, consensus and the finally agreed story points are to be updated in the project workbook estimation columns.