



# REFINING THE BACKLOG

A product backlog should be a working asset consisting of a number of user stories or work items, reflecting the Product Owner's current view of scope and priority within the product. That means it needs to be kept up-to-date, reflecting and anticipating changes. The process of ensuring this, is known as refining the backlog. Although this process is run and managed by the Product Owner, the work itself requires input from the development team and therefore is usually done in a small team meeting.

Refining the backlog usually consists of:

- preparing stories for the coming iteration – splitting items which are too large or assigning estimates or acceptance criteria to stories without them
- making changes to existing stories – either changing estimates in the light of actual performance or reassessing their priorities
- checking that the assessment of priorities is still correct and changing it as necessary
- creating new stories where a demonstration or feedback has suggested a new need
- removing stories which no longer appear necessary.

## Benefits of refining the backlog

- A backlog is not created with the aim of being an entire and accurate representation of requirements; it is expected that it should change during development. Refining the backlog is simply the formal process of doing this. It enables development to begin while some ideas are vague – they can then be enhanced or broken down during refining, once the Product Owner and team have learnt more during the first few iterations.
- A carefully refined backlog will make sprint planning meetings much faster and more efficient.
- Refining stops the product backlog from becoming an endless list, and helps the team focus on completing what is necessary rather than gold-plating. This helps curb complexity, as well as budget and time over-run.
- By checking the priority formally, the Product Owner ensures the backlog stays up to date with changing circumstances, including what the team have learnt in the last iteration.
- The Product Owner also remains aware of items 'buried' in the backlog – especially those that carry technical risk and can review them with the team well in advance of the actual sprint.

## Implementation

### Prerequisites

An existing product backlog. This can be in an early state, as the practice is an important element of helping the backlog develop.

Outcome

Function

Benefit

Who

Scaling Factors

Difficulty



## Implementing refining the backlog

1. How frequent the practice should be depends on your development cycle. It should be done at least once every iteration, and some suggest every week. It is probably best to begin weekly and then cut back if the meeting feels superfluous.
2. Decide what you intend to focus on in this refining session. If the planning meeting is the next day, you will want to check that the stories at the top of the backlog are the correct ones, that they are the right size, and that they have all the information required, including acceptance criteria. If the session is following a review, you may need to update other stories in the light of what you have learned, change priorities, create new stories and purge others.
3. Invite only a small team – the Product Owner, a couple from the development team and one or two stakeholders. Who is needed depends very much on the type of project being run and your goal. Invite those with the skills you need – someone expert in estimating, someone good at thinking up acceptance criteria, etc. – but keep the team small and tightly focused.
4. Keep the meeting to time. Roman Pichler advises 2-4 hours in total of refining per 2-week iteration.

## Potential pitfalls

- It can feel hard for the development team to be asked to take time out of their current work to spend time thinking about future iterations. As long as the refining genuinely makes planning meetings far shorter and more efficient, they should come to see the value.
- The session is not an excuse for the Product Owner to spend vast amounts of time endlessly re-prioritising or re-estimating. The vast majority of a refining session should be about a just-in-time preparation of what is needed for the forthcoming sprint, with the balance ensuring that Product Owner does not lose sight of the big picture.

If you want to learn more, consider reading:

*Agile Product Management with Scrum: Creating Products that Customers Love* by Roman Pichler