**Backlog Grooming or Refinement**

Product Backlog refinement is the act of adding detail, estimates, and order to items in the

Product Backlog. This is an ongoing process in which the Product Owner and the Development Team collaborate on the details of Product Backlog items. During Product Backlog refinement, items are reviewed and revised. The Scrum Team decides how and when refinement is done. Refinement usually consumes no more than 10% of the capacity of the Development Team. However, Product Backlog items can be updated at any time by the Product Owner or at the Product Owner’s discretion.[[1]](#footnote-1)

Higher ordered Product Backlog items are usually clearer and more detailed than lower ordered ones. More precise estimates are made based on the greater clarity and increased detail; the lower the order, the less detail. Product Backlog items that will occupy the Development Team for the upcoming Sprint are refined so that any one item can reasonably be “Done” within the Sprint time-box. Product Backlog items that can be “Done” by the Development Team within one Sprint are deemed “Ready” for selection in a Sprint Planning. Product Backlog items usually acquire this degree of transparency through the above described refining activities.[[2]](#footnote-2)

The Development Team is responsible for all estimates. The Product Owner may influence the

Development Team by helping it understand and select trade-offs, but the people who will perform the work make the final estimate.[[3]](#footnote-3)

A Product Backlog Review Meeting (also referred to as a Prioritized Product Backlog Grooming Session) is a formal meeting, which helps the Scrum Team review and gain consensus about the Prioritized Product Backlog.[[4]](#footnote-4)

**Managing Changes through Prioritized Product Backlog Grooming**

A typical Product Backlog will contain all User Stories, their time estimates (including any revised estimates), and the status of higher priority requirements. Any new or revised User Stories resulting from changes to business requirements, customer requests, external market conditions, and/or lessons learned from previous Sprints are also incorporated.[[5]](#footnote-5)

One of the Product Owner’s key responsibilities is grooming the Prioritized Product Backlog to ensure the prioritized requirements in the Prioritized Product Backlog to be included in the next two to three Sprints are refined into suitable User Stories. It is recommended that the Product Owner should spend a significant amount of the time in each Sprint for Prioritized Product Backlog grooming. The Product Owner is responsible for adding and revising Prioritized Product Backlog items in response to any changes and is responsible for providing more detailed User Stories that will be used for the next Sprint.[[6]](#footnote-6)

Grooming helps ensure that refining of requirements and their User Stories is done well in advance of the Sprint Planning Meeting so that the team has a well-analyzed and clearly defined set of stories that can be easily broken down into tasks and subsequently estimated. Based on lessons learned from the current Sprint, there may be changes to requirements, or there may be reprioritization that can be easily incorporated into subsequent Sprints. Grooming supports and enhance the flexibility of the Scrum model by incorporating the latest business and technical insights into future Sprints.[[7]](#footnote-7)

A Product Backlog Review Meeting (also referred to as Prioritized Product Backlog Grooming Session) is a formal meeting during the Groom Prioritized Product Backlog process, which helps the Scrum Team review and gain consensus about the Prioritized Product Backlog. However, other than the Prioritized Product Backlog Review Meeting, Prioritized Product Backlog grooming should happen throughout the project and can included situations in which the Product Owner writes new User Stories or reprioritizes User Stories in the existing Prioritized Product Backlog, Scrum Team members or Stakeholders give their suggestions about new User Stories to the Product Owner, and so forth.[[8]](#footnote-8)

It is important to note that any item in the Prioritized Product Backlog is always open for re-estimation until the Sprint Backlog is finalized in the Create Sprint Backlog process. After that, changes can continue to be made until immediately prior to the Sprint Planning Meeting, if required.[[9]](#footnote-9)

**Effective Product Backlog Review Meeting (or Prioritized Product Backlog Grooming Session)**

The Product Owner takes the lead in a Product Backlog Review Meeting which is conducted during the Groom Prioritized Product Backlog process. It is important that the Product Owner sets the objectives and ideally develop an agenda before the Product Backlog Review Meeting begins. Without these, the session will be unstructured and may prove unproductive. It is also important to limit the number of stakeholders participating in the meeting. Having too many participants tends to decrease the overall efficiency of the meeting. The Product Owner should invite only those stakeholders whose feedback is required for the grooming session. All Scrum Team members should be included because their input is valuable to the work being done and any issues encountered. If the grooming session results in any reprioritization of or change in the Prioritized Product Backlog, it is important that the team is in agreement with those changes.[[10]](#footnote-10)

An effective grooming session should results in clearly defined P Prioritized Product Backlog Items (PBIs) so that the Scrum Team clearly understands what the customer’s requirements are. This also helps the team become familiar with all User Stories in case one of more of them needs to be included in a Sprint on short notice. Acceptance and Done Criteria may also be discussed during grooming sessions.[[11]](#footnote-11)

Scrum does not Time-box grooming exercises. Prioritized Product Backlog grooming is a continuous activity for the Product Owner[[12]](#footnote-12).

Prioritized Product Backlog may be updated with new User Stories, new Change Requests, new identified Risks, updated User Stories, or reprioritization of existing User Stories.[[13]](#footnote-13)

**Updated Program Product Backlog**

Similar to the Project Product Backlog, the Program Product Backlog may also undergo periodic grooming to incorporate changes and new requirements. Changes to the Program Product Backlog can result from changes in either external or internal conditions. External conditions might include changing business scenarios, technology trends, or legal compliance requirements. Internal factors affecting the Program Product Backlog could be related to modifications in organizational strategy or policies, Identified Risks and other factors. Changes in requirements in the Program Product Backlog often impact the Project Product Backlogs of underlying projects, so they should be taken into account during the Groom Prioritized Product Backlog process.[[14]](#footnote-14)

**Self-Assessment**

**Management and Refinement**: Identify the need for the Product Backlog to be refined periodically in order for it to remain good enough for the next level of planning. The whole Scrum Team can participate in the refinement of the Product Backlog.[[15]](#footnote-15)

**Understand product backlog grooming[[16]](#footnote-16)**:

* The necessary steps to groom the product backlog such as discovering new requirements, and updating or removing existing ones; prioritizing the backlog; preparing high-priority items for the next sprint planning meeting; estimating items.
* Approaches to stocking the product backlog and determining the release scope such as deriving the contents from the product vision.
* That just-enough requirements are identified and described just-in-time according to their priority throughout the entire project.
* That grooming the product backlog is a collaborative effort shared by all Scrum team members; the product owner leads the efforts; the team members can spend up to 10% of their time on grooming. Grooming often involves customers and users and other stakeholders including marketing and sales.
* That the high-priority items likely to be worked on in the next sprint must be small enough to be fully transformed into a product increment. They should also be clear and testable.
* That at least one technique suitable to capture product backlog items, for instance, user stories.
* How non-functional requirements can be dealt with in the product backlog.

For Prioritized Product Backlog Grooming, describe the following:

* The objective of the grooming and required outcomes.
* Who participates in the meeting?
* When the meeting occurs.
* How long the meeting is allowed to last.
* Any necessary inputs for the meeting.
* What questions are discussed during the grooming meeting?
1. Scrum Guide July 2013, [www.scrumguides.org](http://www.scrumguides.org) [↑](#footnote-ref-1)
2. SG [↑](#footnote-ref-2)
3. SG [↑](#footnote-ref-3)
4. Scrum Book of Knowledge, www.scrumstudy.com [↑](#footnote-ref-4)
5. SBOK [↑](#footnote-ref-5)
6. SBOK [↑](#footnote-ref-6)
7. SBOK [↑](#footnote-ref-7)
8. SBOK [↑](#footnote-ref-8)
9. SBOK [↑](#footnote-ref-9)
10. SBOK [↑](#footnote-ref-10)
11. SBOK [↑](#footnote-ref-11)
12. SBOK [↑](#footnote-ref-12)
13. SBOK [↑](#footnote-ref-13)
14. SBOK [↑](#footnote-ref-14)
15. CSM Learning Objectives, [www.scrumalliance.org](http://www.scrumalliance.org) [↑](#footnote-ref-15)
16. CSPO Learning Objectives, [www.scrumalliance.org](http://www.scrumalliance.org) [↑](#footnote-ref-16)