

Rock Crusher Ceremonies:

The Crush Meeting
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The “Crush Meeting”

The Crush Meeting is a metaphor for the regular backlog refinement meeting that every team should be holding. The Rock Crusher doesn’t add new ceremonies to a team calendar; rather, it leverages the existing backlog refinement ceremony.

The intent of any backlog refinement meeting is to:

- Align the team to the backlog content and create awareness of upcoming work;
- Ensure the team is not starved for “Ready” backlog items;
- Ensure the right work is moving through the Rock Crusher in a timely manner;
- Decide what “Crushing” needs to be done to get a backlog item from its current state to the next state to Ready; and
- Eject “debris” through the Waste Gate – that is, remove work from the backlog that is no longer considered valuable.

The Crush Meeting: How Valuable? How Big? How Ready?

The Crush Meeting participants need to answer, or plan how to answer, three questions for each Rock considered during the Crush Meeting:

How valuable is this Rock?	<p>The Backlog Owner</p> <ul style="list-style-type: none"> • Is accountable for prioritizing work in the backlog to deliver the best value to the organization. • Needs to know the value a Rock could potentially create for the organization: <ul style="list-style-type: none"> › May “intuitively or arbitrarily” know the value because they have intimate awareness of the marketplace; or › May have to collaborate with others such as the Solution Manager, the Initiative Owner, the Stakeholders, and the team to defensibly determine the value for a Rock.
How big is this Rock?	<ul style="list-style-type: none"> • While a Rock may create huge value for the organization, it may also require a huge investment of time and effort to create value. • Organizations have limited resources and therefore can’t pursue every good idea – no matter how valuable. Pursuing one idea means not pursuing others. • Pursuing the large valuable Rock could mean passing on a set of smaller Rocks that collectively deliver more value sooner. (This is why the Rock Crusher has a Waste Gate.) • A team needs to know how big a Rock is to decide if the Rock can be pulled into an iteration (or can satisfy the team’s SLA) or if they will have to split the Rock into implementable chunks.
How Ready is this Rock?	<ul style="list-style-type: none"> • If, after answering the “how valuable” and the “how big” questions, the Backlog Owner decides the Rock is still a good use of the team’s capacity, then it can be prioritized. • Then ask what has to get done to get this Rock “Ready.” Is there some minor refinement the team can collectively do during the Crush Meeting or is more investigation required? Perhaps the team needs to create a Crusher or a Spike.

Rocks are Pulled Through the Crusher

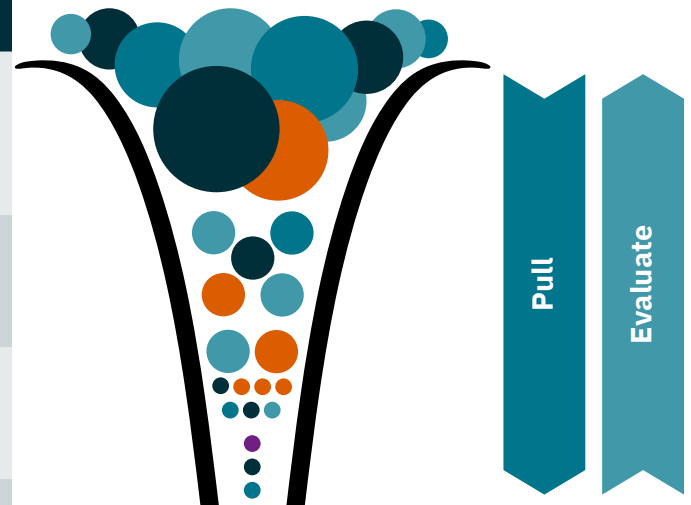
The Rock Crusher is a “pull-based system.” As the team “pulls” Ready Rocks into the “Thin Pipe,” new Rocks must be made Ready so the team is not starved for work. A guideline for avoiding starvation is to have up to two iterations of Ready Rocks. It is important not to over Crush or have an excessive supply of Ready Rocks. Over Crushing creates wasteful work-in-progress and is the slippery slope to old fashion big up-front design (BUFD). This is the backlog as a reservoir problem you are trying to avoid. There is little value in Crushing Rocks faster than they can be consumed. The volume of Rocks to consider Crushing is driven by two factors:

- The volume of Rocks the team can consume – that is, pulled through the Thin Pipe; and
- The average volume of Rocks ejected through the Waste Gate. Not all work in a backlog will (or should) get done. A fair percentage of it will be removed from the backlog.

The team use the Crush Meeting to pull work through the Crusher by working their way up or backwards through the Rock Crusher. They start by verifying the readiness of the Ready Rocks and ensuring there is an appropriate set of Ready Rocks. From there, they begin to work their way up and evaluate (size, split, crush) forecasted Rocks to “pull” them into Ready.

Evaluating Rocks “upwards” through the Rock Crusher, from Ready to Wishful Thinking, you are effectively “pulling” Rocks through it.

EVALUATE	
Wishful Thinking/ Big Idea	<ul style="list-style-type: none"> • Review & size new rocks that have entered Wishful Thinking since the last meeting • Add “Crushers”
Speculative	<ul style="list-style-type: none"> • Split/Crush speculative Rocks by priority to replenish Forecasted Rocks • Add “Crushers”
Forecasted	<ul style="list-style-type: none"> • Split/Crush speculative Rocks that are near Ready to replenish Ready
Ready	<ul style="list-style-type: none"> • Verify the Ready Rocks • Verify there are enough Ready Rocks to avoid starvation



Pulling Rocks Through the Rock Crusher by Working Upwards

Crush Meeting Agenda

A Crush Meeting “walks up” through the Rocks Crusher answering the three questions for each Rock. The generic Crush Meeting Agenda is:

- Backlog Owner welcomes team members and reviews the Solution objective.
- Backlog Owner reviews, with the team, changes to the backlog since the last meeting, including new work that has entered the Rock Crusher.
- Starting with Ready backlog items, the Backlog Owner walks back from highest priority to lower priority Rocks, determining their readiness. For each Rock considered:
 - i. Backlog Owner will present a Rock to the team. The team asks the Backlog Owner clarifying questions about the Rock. During the process, the Backlog Owner expresses the value of the Rock. The Backlog Owner may have already determined the value of the Rock or may need to engage the team to determine the value of the Rock.
 - ii. The team collectively sizes the Rock using some form of collaborative sizing technique such as planning poker or a sizing board.
 - iii. The team and Backlog Owner review the “readiness.” Then, based on the value and size of the Rock, determine the next steps to get the Rock “Ready.” Readiness is based on the team’s Definition of Ready (DoR), the criteria the team uses to determine if the backlog item, or Rock, can be pulled into the steps in the Thin Pipe that follows the Rock Crusher. The team decides what work is required to get the Rock Ready. Sometimes, final readiness can be handled during the Crush meeting. In other situations, further investigation is needed, such as a Spike or the creation of a Crusher. The Backlog Owner may also decide it is no longer worthwhile continuing with this Rock and ejects it through the Waste Gate.

Size Matters

The collaborative sizing process generates significant knowledge the team can use to plan what they need to do to get a Rock Ready. Assuming the Backlog Owner determines the Rock is “valuable” then using this sizing knowledge you can determine the next Crushing steps:

1. The team can size the backlog item, and the backlog item is “right sized” – either fits nicely into an iteration or can be delivered within the SLA.
 - a. The item meets or mostly meets the team’s “Definition of Ready.”
 - b. The Backlog Owner can force-rank it against other backlog items. In this situation, there is little or no work remaining, and the backlog item may be set to Ready. No further crushing is required to get it ready.
2. The team can size the backlog item, however the backlog item is too large to fit into an iteration. The backlog item is well-refined and meets most of the INVEST criteria, for example, it has decent acceptance criteria, but it doesn’t meet the Definition of Ready. This is an example of a classical Epic (versus the SAFe definition of an Epic).
 - a. During the Crush Meeting, the team collectively “splits” the Rocks, e.g., using Bill Wakes 20 ways to create “right sized” backlog items. Creating a Crusher is probably not required because this is just a straightforward tactical “split” where the child backlog items are at the same level of abstraction as the parent. Most of these backlog items will be “forecasted” and such splitting makes them Ready.

3. The team can size the backlog item because the backlog item is reasonably well understood but the backlog item is very large. If the large backlog item is reasonably well understood, then it is likely there is either some model describing the large backlog item (e.g., a use case) and/or the backlog item has a good set of acceptance criteria.
 - a. Using the model(s) and the acceptance criteria, the team may be able to collectively split the large backlog item into smaller backlog items without requiring a Crusher. Most of these backlog items will likely have just made the transition from “speculative” to “forecasted.”
 - b. If the team can’t collectively Crush the large backlog item in short order, then a Crusher backlog item should be created. The Backlog Owner then prioritizes the Crusher like any other backlog item.
4. The team is either unable to size the item or the sizing is vague (e.g., can’t be sized beyond a gross t-shirt size, S, M, L). The inability to size a backlog item is a clear marker the team doesn’t know enough about the backlog item to properly consider moving the Rock forward.
 - a. The team creates a Crusher backlog item to generate the knowledge required to refine the backlog item.

Sizing also informs the Backlog Owner if the Rock, or backlog item, is still worthwhile. Knowing the size of the Rock informs the Backlog Owner how much it will cost to implement. The Backlog Owner needs to decide if the value they will receive is worth the cost, especially considering the other Rocks they may have to forgo to realize the value of this Rock (opportunity cost). The Backlog Owner can either:

- Eject the Rock through the Waste Gate; or
- Create a Crusher to investigate cheaper implementations of the Rock. The Pareto Principle can often be drawn upon to find the 20 percent of the Rock that yields 80 percent of the value.

A third course of action is to leave the Rock in place with the hope that perhaps circumstances will change in future and the deferred Rock will become a better bet when compared against other Rocks. This kind of non-decision should generally be avoided because it just clutters and clogs the Rock Crusher with zombie Rocks. This is also why it is recommended “aging” Rocks to force the removal of zombie Rocks.

Crushing is a Team Sport – Crush Meeting Attendance

There is an Agile saying that “those who do the work, size the work” – so whoever will be doing the work needs to be at the Crush Meeting. If a development team is pulling Ready Rocks into an iteration, then the whole development team needs to participate in the Crush Meeting. Classic Agile methodologies usually specify the meeting attendees as the Product Owner and the team.

In the Rock Crusher, it will be the team and the Backlog Owner, but also may include the Initiative Owner, the Solution Manager, the Analyst and the SME. The choice of participants is determined by who is being held accountable for decisions and who has the knowledge needed to make those decisions. Typically, the Backlog Owner, the Solution Manager and Initiative Owner know the value of the Rock. The team knows how much it costs to implement.

The Crush Meeting for a Small Team with Simple Content Authority

A small team is the classical Scrum team of seven +/- two people. The team has a very clear and well-defined Solution, and content authority is:

- Backlog Owner is playing all Rock Crusher roles and is therefore a classical product owner; or
- Backlog Owner is paired with a Solution Manager; or
- Backlog Owner is working closely with one Initiative Owner.

The regular Crush Meeting is likely adequate for all participants to resolve the issues about what to Crush and when.

The Crush Meeting is typically held weekly and is a ninety-minute to two-hour meeting. Many teams using a two-week time-box often use the same day of the week for either their regular Iteration planning meeting or their Crush Meeting. For example, a team that runs a two-week iteration, with their planning day on a Wednesday, would use the same time block the following Wednesday for their Crush Meeting.

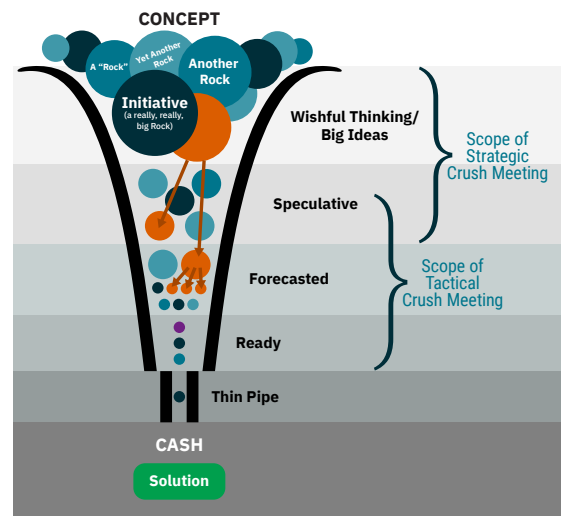
The Crush Meetings for Larger Teams or More Lines of Complex Content Authority

The single Crush Meeting will not be practical for larger teams, around 30 people, perhaps organized into three or four teams. If there are multiple teams, then there will be inter-team coordination issues. If there are complex lines of content authority, such as multiple Initiative Owners, then a single Crush Meeting will not be sufficient to resolve all the competing prioritization issues. Furthermore, in a more complex content management situation, it may not be a good use of a team member's time to be regularly involved in Crushing extremely large distant Rocks.

The solution is to split the Crush Meeting into two meetings:

- One is tactical, more focused on execution, that is getting “forecasted” and some “speculative” Rocks to Ready.
- The other is more strategic, determining which Rocks are good bets and getting them from “wishful thinking” to “speculative.”

The Tactical Crush Meeting is very much like a small team Crush Meeting but with more emphasis placed on “how ready is this Rock,” rather than on “how valuable” or “how big” it is. If there are multiple teams sharing a backlog, then each team conducts its own tactical Crush Meeting for the Rocks they are accountable for.



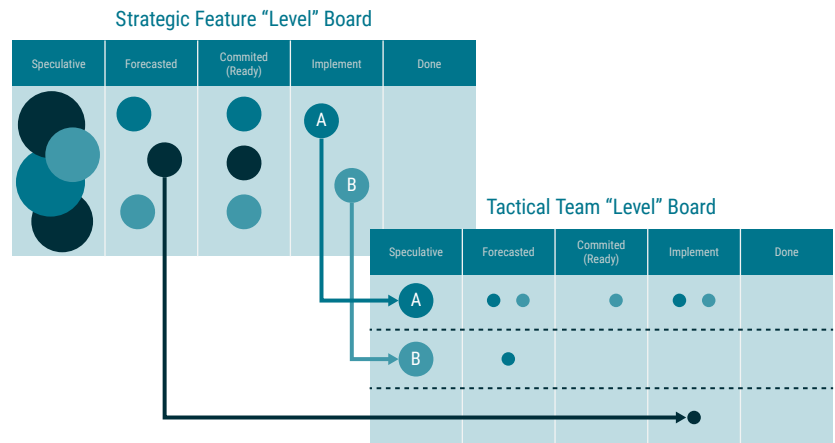
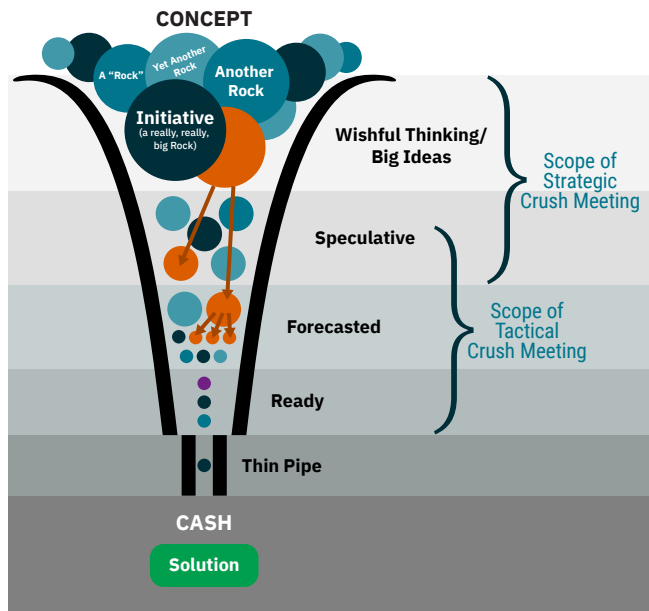
Scope of the Strategic and Tactical Crush Meetings

The Strategic Crush Meeting brings key Rock Crusher roles and representatives from all teams together. Typically, the Backlog Owner from each team attends, plus the Solution Manager, Initiative Owners, Analyst, and select Subject Matter Experts and Stakeholders. The focus of this meeting is more on determining “are we working on the right things” than on answering the questions “how valuable” and “how big” they are.

Like the small team Crush Meeting, the Strategic Crush Meeting also works its way up the backlog. Splitting the Crush Meeting into a Strategic Crush Meeting and a Tactical Crush Meeting does not change the fact the Rock Crusher is a pull-based system.

Whereas the Tactical Crush Meeting will likely occur every other week for a team running a two-week iteration, the Strategic Crush Meeting will occur less frequently. Typically, the Strategic Crush Meeting will occur at half the cadence of the tactical meeting. For example, with a bi-weekly tactical meeting schedule suggested earlier, the strategic meeting may be held monthly.

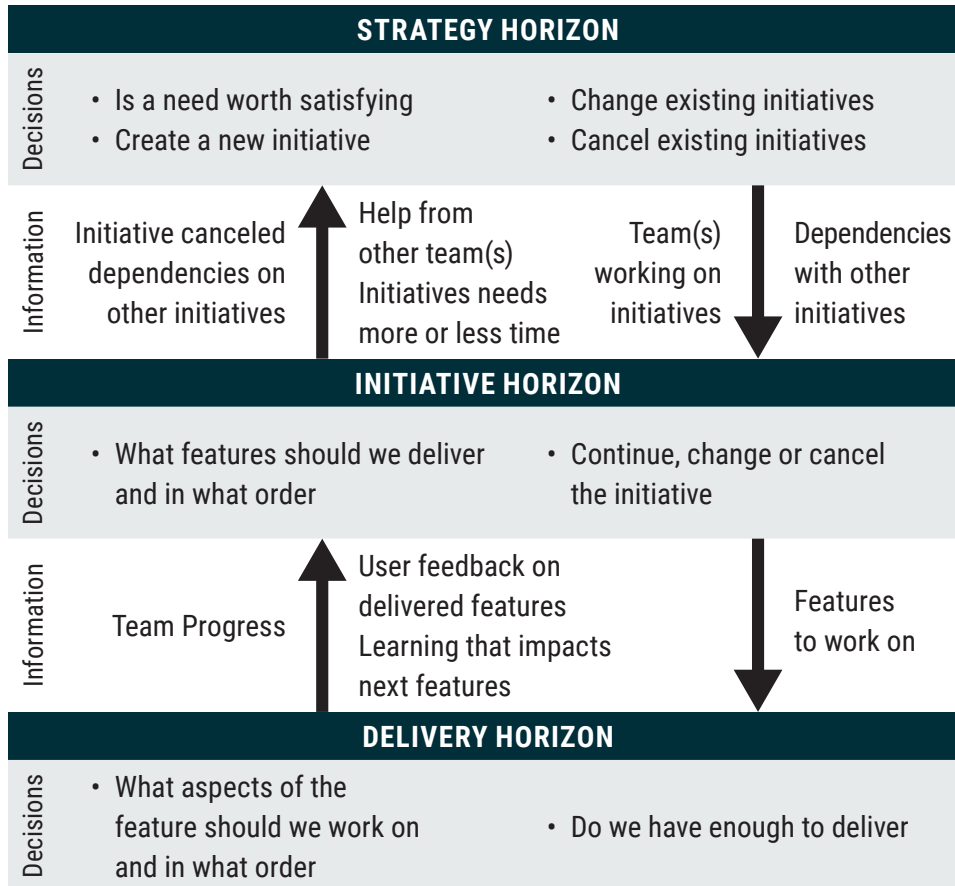
This strategic-tactical split is implemented using the linked Kanban board strategy.



Implementing the Strategic-Tactical Split Using Linked Kanban Boards

The Multi-Planning Horizon Crusher

More than 30 people dealing with more complex strategy or portfolio management concerns; adopt a more sophisticated multi-horizon approach to managing the backlog. Using the IIBA Multiple Horizon Planning model, you can establish multiple levels of Crush Meetings.



Delivery Horizon Crush Meeting	This remains the same as Tactical Crush Meeting.
Initiative Horizon Crush Meeting	This is similar to the Strategic Crush Meeting but the focus is on Rocks and Initiatives associated with a specific Solution.
Strategy Horizon Crush Meeting	This Horizon is often associated with a Portfolio of Solutions or Initiatives. Participants will include Solution Managers and Initiative Owners. This meeting will occur at about the half the cadence of the Initiative Horizon Crush Meeting, e.g., once every two months.

Summary

The Crush Meeting is a generalization of the regular Backlog Refinement meeting that all teams should hold regularly.

A team-level Crush Meeting should be held weekly. A team running a two-week iteration often alternates between holding their regular planning meeting in the first week and their Crush Meeting in the following week.

The goal of the Crush Meeting is to ensure the team has a supply of Ready Rocks and the ready Rocks are the right Rocks to work on.

A team “pulls” work through the Rock Crusher.

A medium size team (e.g., ten to thirty individuals), or a team with complex content management challenges (e.g., multiple Initiative Owners), may take a tiered approach.



Learn More

Rock Crusher for Backlog Management

Read:

1. Introduction
2. Ceremonies
3. Implementing
4. Roles
5. Crushes/Backlog Items

Considered Harmful
Anti-Patterns
Re-acquainting
Work not Road Mapped

View:

[Rock Crusher Infograph](#)

[User Story Infograph](#)