# Getting Re-acquainted with the Humble Backlog

contributed by Steve Adolph

Deliver Better Economic Outcomes

The concept of a backlog is common to all Agile methodologies. Seemingly simple and humble, the backlog is a powerful value management tool that enables management of value (rather than work) by:

- Dynamically re-prioritizing work items as we learn what is truly valuable;
- Adding new work items to the backlog that have value to the stakeholder;
- Removing work items from the backlog that no longer create value for the stakeholder;
- Refining existing work items knowing what is truly valuable and avoiding committing valuable development resources to features and services that deliver marginal value; and
- Deferring commitment until the last responsible moment when more information is available to make better quality scope and prioritization decisions.
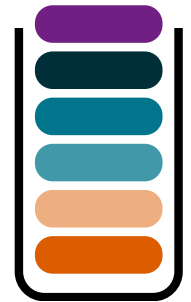
The backlog enables us to embrace change and leverage learning to discover what is valuable to our stakeholders.

The backlog is a list of the work we are forecasting that we may need to do to create value. We say "forecasting" because the backlog does not represent a set of "committed requirements" as is the case with a signed off requirements document. There are two rules with respect to an item in the backlog:

- If its in the backlog it MAY get done; and
- If its not in the backlog it won't get done.

Deferring commitment creates the opportunity to manage a flow value by actively learning from earlier commitments. This feedback cycle enables us to exploit implementation as an analysis tool, to rapidly test a value hypothesis and steer the development of a product or service such that we can create higher value for the stakeholders.

The backlog enables us to implement adaptive planning strategies.

The classic Scrum "machine" highlights the rapid learning that Scrum enables. Built right into the definition of Scrum is rapid feedback and enhancing value through rapid learning cycles.

Scrum (n): A framework within which people can address complex adaptive problems, while productively and creatively delivering products of the highest possible value. – Scrum Guide


In an agile Unicorn and Rainbow world, backlog items are completed every few days, therefore the feedback cycle is short and the learning rapid.

The Scrum "Machine"

The work items in the product backlog are prioritized by value. Given the Agile methodology's economic assumption of fixing the time and cost, and flexing the scope, we want to invest our product development time and effort always in the most valuable work.

Re-prioritization of the work in the product backlog is how we sequence the flow of the work, and therefore how we manage the value. When someone comes to ask us what we did with their money, we want to tell them we delivered their most valuable items.
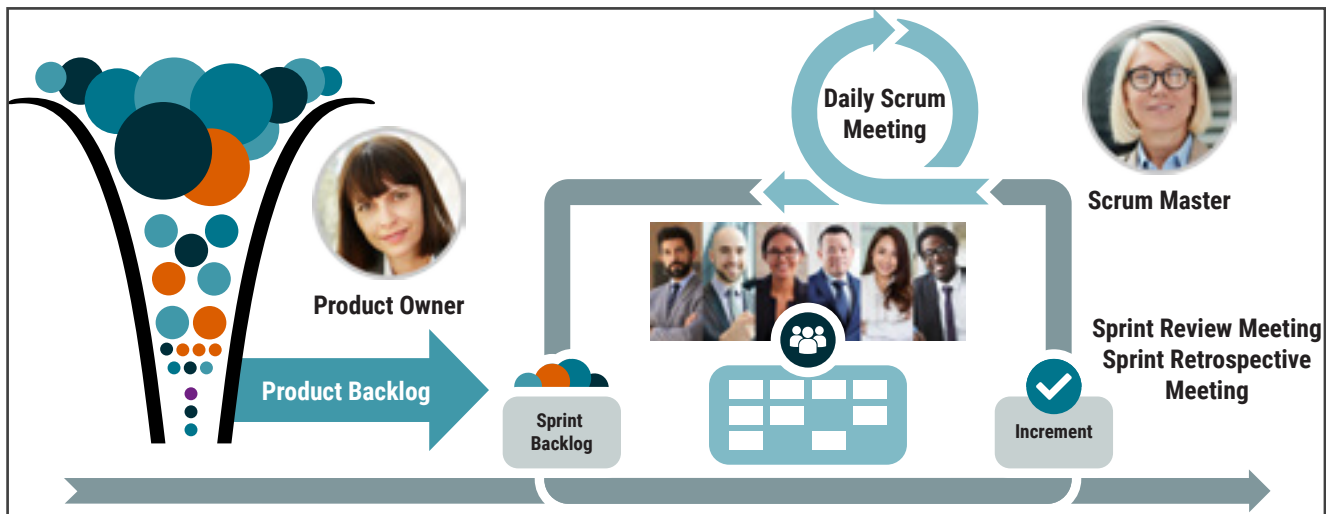
Rock Crusher View of the Backlog

What is a Backlog?

The Agile Alliance's definition of a backlog is a seemingly simple To Do list:

> *"A backlog is a list of features or technical tasks which the team maintains and which, at a given moment, are known to be necessary and sufficient to complete a project or a release…" – Agile Alliance*

The Scrum Guide defines a "product" backlog as:

> *"The Product Backlog is an ordered list of everything that is known to be needed in the product. It is the single source of requirements for any changes to be made to the product…… A Product Backlog is never complete. The earliest development of it lays out the initially known and best-understood requirements. The Product Backlog evolves as the product and the environment in which it will be used evolves." — The Scrum Guide.*

The IIBA Agile Extension's definition of the backlog highlights that placing an item in the backlog is not a commitment:

> *"A wish list of requests for features to be included in a product." — IIBA Agile Extension*

The physical implementation of a backlog could be as simple as a:

- Prioritized collection of post-it Notes on a wall;
- To-do list of items in an Excel spread sheet; or
- It could be represented using a sophisticated agile life cycle management tools like:
    - › Microsoft ADO;
    - › Version One; or
    - › Jira.

The scope of a backlog could be the backlog of work for one individual, or it could represent the entire corporate portfolio for a large multi-national corporation. Regardless of its implementation and scope, a backlog is simply a tool for managing the flow of value.

What's in the Backlog?

What do we put in the backlog? EVERYTHING! Backlog items can be:

- New features;
- Defect fixes;
- Spikes – exploratory work;
- Architectural enablers; or
- Any other work the team must do.

A backlog is a To Do list after all. If its not in the backlog, then it will not get done. Everything goes in the backlog, whether it is a:

- New functional capability;
- Defect fix;
- Architectural enabler; or
- Technical debt payment.

The converse, however, is not true. Just because something is in the backlog does not guarantee that it will get done. It will be taken into consideration, depending on its priority, by those managing the value being created. Only when the team commits to a backlog item will it get done, and that commitment is left "to the last responsible moment."

What is a Backlog Item?

A backlog item is something to do. The term "user story" – or just "story" – is often used as a synonym for "backlog item." Technically, user stories are a specific way of capturing a user need. While even the authors themselves frequently refer to backlog items as "stories," this use of the term "story" or "user story" is confusing and improper because it limits our thinking of backlog items to being of only one type of work. Any kind of work the team may do is represented in a backlog as a backlog item. User stories are just a good way to capture something of value to a user of the system.[1]

Backlog items can also represent many different types of work, and every backlog item represents some piece of work the team may, or may not, do.

Backlog Item

Architecture Item · **Technical Debt** · **User Story** · **Bug Fix** · **Other Type...**
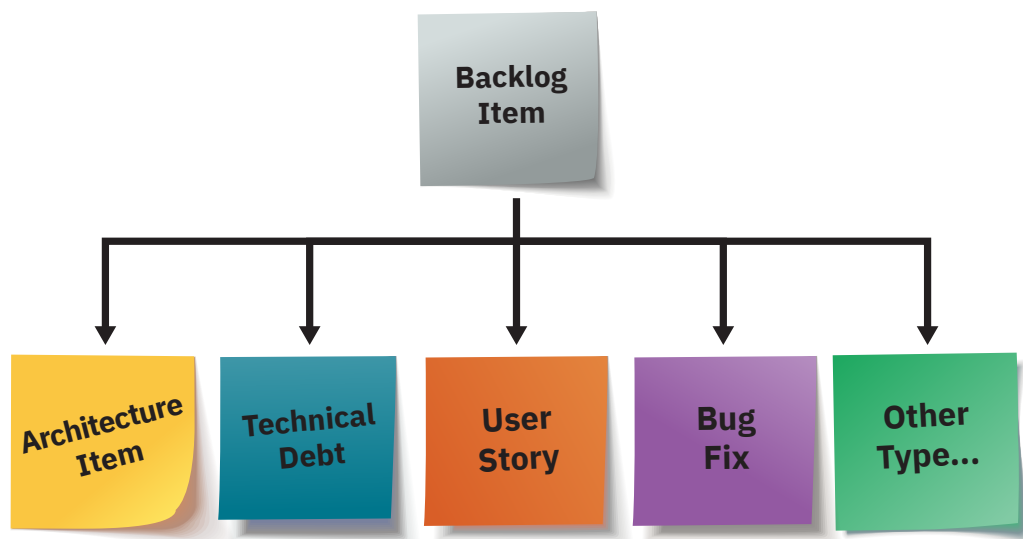
Different Types of Backlog Items

User Stories are Special and Get to the Heart of What a Backlog is About

While we have taken pains to diminish user stories' apparent special status as a backlog item, there is an important trait of user stories that makes them special. Most Agile practitioners insist user stories are not requirements, rather they are "promises for a conversation."

User stories were never intended to become a synonym for requirements. As Alistair Cockburn once described, a user story is a "promise for a conversation." In other words, they were intended to foster a collaboration between the team and the product owner to determine what the real need was.

A requirement in this context is seen as a contractual obligation for a behaviour or trait the system must possess. There is little or no opportunity to negotiate a requirement. As Frederick Brooks would say, "determine precisely what to build." Therefore, simply referring to all backlog items as "stories" diminishes this specialness.

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1   While most Agile instructors teach "user stories" as a part of Scrum Introduction courses, the Scrum guide itself never mentions user stories as part of Scrum. User Stories are just another backlog item type.

User stories exemplify what the backlog is all about; they are a tool for facilitating collaboration between those requesting work and the producers delivering that work. These conversations help create understanding so all parties know:

- Why the backlog item is in the backlog;
- The value it may contribute; and
- The cost of implementing it.

These collaborations, facilitated by the backlog, help increase the economic value of delivered work.

Summary

- The backlog is a list of the work we are forecasting that we may need to do to create value.
- Technically, all work for a team is in the backlog. If it's not in the backlog it will not get done.
- The backlog is dynamic and not a committed list of work. Even if it's in the backlog, it may not get done.
- User stories are one type of backlog item.
- The backlog enables us to deliver better economic value by:
  - › Deferring commitment and creating greater opportunity to learn what is really valuable; and
  - › Facilitating conversations between requesters and producers that improve alignment (gets everyone on the same page).

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