

# ACE 102

## Roles and Responsibilities



Agile Center of Excellence

# Agenda

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- Introduction
- Glossary
- SDLC Framework
- Role Matrix
- Role Review
- Activity



# Breakout Info

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- Jam Board
  - Main Session
  - Team 1 Breakout
  - Team 2 Breakout
  - Team 3 Breakout
  - Team 4 Breakout



# Intent and Assumptions

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## Intent:

- This material has been created to establish a common language and framework for all stakeholders to communicate and facilitate the movement of work from ideation to completion in a consistent and efficient manner

## Assumptions:

- Individuals may perform multiple Roles to ensure all Responsibilities are fulfilled
- Team discretion should be used at all times

# Glossary

- **Acceptance Criteria** - Specific conditions, with clearly defined pass / fail results, that must be met, before a Feature can be Accepted
- **Artifact** - Theme, Initiative, Feature, User Story, or Task
- **Assumption** (*a.k.a. Pre-Condition*) - Specific criteria that must be met before the end user is eligible to achieve the desired outcome identified in the Requirements or Acceptance Criteria
- **Backlog** - Stack-ranked, prioritized list of work items to be completed
  - **Portfolio Backlog** - Project / Initiative artifacts prioritized by the Business Sponsor or Business Partner
  - **Product Backlog** - Feature artifacts prioritized by the Product Owner
  - **Team Backlog** - User Story artifacts prioritized by the Scrum Master
  - **Iteration Backlog** - User Story artifacts for a specific team, for a specific Iteration, prioritized by the Scrum Master
- **Bug** - Error found in the Development environment
- **Business Case** - Issue or opportunity to be solved and expected outcome the solution will provide
- **Capacity** - Maximum amount of work a team is capable of delivering in a given time period
- **Customer Journey Mapping** - Exercise of visually documenting the process a customer goes through to achieve the desired outcome specified in the Requirements or Acceptance Criteria
- **Cycle Time** - Time between when work begins on an Artifact and when work is complete on an Artifact
- **Defect** - Error found in the Test environment
- **Definition of Done** - All Acceptance Criteria has been met, Testing is complete, code is deployed into Production, and all Artifacts are updated
- **Deliverable** - Desired outcome or functionality that a specific Artifact will deliver
- **Dependencies** - Completion of one Artifact is reliant upon the completion of another Artifact

# Glossary

- **Deployment** - Artifact has met the Definition of Done and is deployed into the Production environment
- **Dev-Ready** - Both the Business and IT agree upon the Value Statement, Scope, and Acceptance Criteria of an Artifact and there is sufficient detail for development to begin
- **Feature** - Independently deployable functionality that satisfies the Definition of Done for the Requirement
- **Impacted Teams** - Individual teams that will be required to complete work in order to meet the Definition of Done for the Artifact
- **Incident** - Error found in Production
- **Initiative** - Group of one or many Features that collectively deliver a specific outcome for the end user
- **Iteration** (*a.k.a. - Sprint*) - Pre-defined consistent time box, during which Impacted Teams develop and deliver User Stories, typically between 1 - 3 weeks
- **Lead Time** - Time between when an Artifact is created and when work is complete on an Artifact
- **Level of Effort (LoE)** - Estimated time (+/- 25%) required to deliver an Artifact
- **Milestone** - Used to track the completion of a set of functionality
- **Release** - Pre-defined consistent time box, during which Impacted Teams develop and deliver Features, typically between 1 month - 1 quarter
- **Requirement** - Desired outcome, output, or functionality requested by the Business on behalf of the End User
- **Return on Investment (RoI)** - Benefit (*Sales / Savings*) divided by the Expense (*Labor / Resources*) required to deliver an Artifact
- **Roadmap** - Strategic plan that identifies the key priorities major milestones required to deliver specified outcomes
  - **Portfolio Roadmap** - 6 - 18 month plan that identifies critical Business outcomes, typically at the Project or Initiative level
  - **Product Roadmap** - 1 - 6 month plan that identifies critical Product outcomes, typically at the Feature level

# Glossary

- **Spike** - A type of User Story used to track the work to research a solution to a Feature or Story when the Impacted Team does not know how to meet the Definition of Done
  - **Steps to Test** - 'Happy Path' series of steps the *USER* would logically take to *ACHIEVE DESIRED RESULT*, that when passed will result in satisfying the Acceptance Criteria
  - **Story Point** - Abstract metric used to measure the complexity, risk, and time required to deliver a User Story. Is used as the baseline to determine a team's Capacity and Velocity. Modified Fibonacci Sequence is one of the more popular methods
  - **Task** - Smallest unit of work, owned by an individual, and typically no smaller than 2 hours and no larger than 4 hours
  - **Technical Debt** - Rework incurred for the future due to implementation of the easier, but not the best solution in the present
- **Test** - Ensure the execution of the Artifact satisfies the Acceptance Criteria and Steps to Test
    - **Automated** - Test cases are executed automatically with the assistance of a software tool
    - **Manual** - Tests cases executed manually by an individual
    - **Regression** - Ensure that deployment of new Feature does not negatively impact existing functionality
    - **Functional** - Ensure the deployment of new Feature satisfies the functional specifications of the Feature
  - **User Story** - Unit of work for a specific Impacted Team that satisfies specific Acceptance Criteria within a Feature, completed within one Iteration



# Glossary

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- **Value** - Objective measure used to prioritize an Artifact based on:
  - Business Rank
  - Return on Investment
  - Dependencies
  - Legal Requirements
  - Market Conditions
  - Other Factors
- **Value Statement** - Describes the intended outcome or value received by the end user as a result of a specific action
  - As a \_\_\_\_\_(*End User*)
  - I want to \_\_\_\_\_(*Action Performed*)
  - In order to \_\_\_\_\_(*Outcome / Value Received*)
- **Velocity** - Rolling average number of Artifacts delivered over a given number of Iterations (*User Stories*) or Releases (*Features*)



# Software Delivery Framework

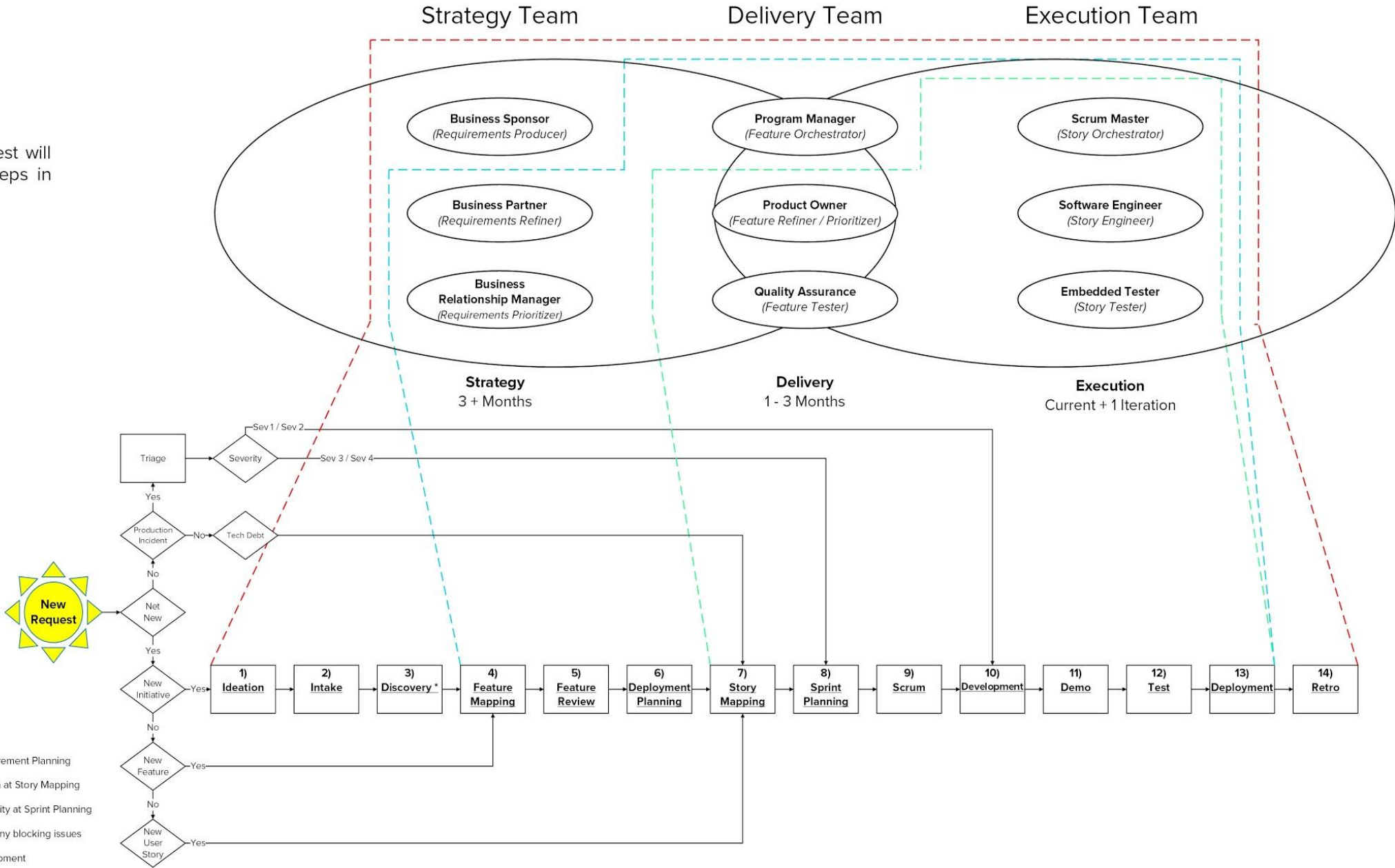
The type, size, and complexity of a request will determine who is impacted and what steps in the process need to be followed

## Legend

- New Initiative**
  - Impact 1+ Product
  - Impact 1+ Team
  - Deployed in 1+ Milestone
- Existing Initiative**
  - Impact 1+ Team
  - Deployed in 1 Milestone
  - >300 Hours of Development
- Existing Initiative**
  - Impact 1 Team
  - Deployed in 1 Milestone
  - >20 Hours of Development

## Process Steps by Project Phase

- 1) New Projects created in Ideation
- 2) Impacted Teams identified at Intake
- 3) Requirements identified in Discovery
- 4) Features defined in Feature Mapping
- 5) Feature Scope accepted in Feature Review
- 6) Incremental Feature delivery priority finalized at Production Increment Planning
- 7) Required Stories identified to meet Feature Acceptance Criteria at Story Mapping
- 8) Execution Team commits to top priority Stories based on capacity at Sprint Planning
- 9) Review of what has been completed, what is in progress, and any blocking issues
- 10) Execution Teams completes committed Stories during Development
- 11) Features are presented for approval at Demo
- 12) Features pass TQA / UAT / DIT testing during Test
- 13) Code Deployed to Production
- 14) Teams utilize Retros for continuous improvement



# Roles

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- **Business Sponsor (BS)** / Requirements Producer
- **Product Manager (PdM)** / **Business Partner (BP)** / Requirements Refiner
- **Business Relationship Manager (BRM)** / Requirements Prioritizer
- **Program Manager (PgM)** / Feature Orchestrator
- **Product Owner (PO)** / Feature Refiner & Prioritizer
- **Quality Assurance (QA)** / Feature Tester
- **Scrum Master (SM)** / Story Orchestrator
- **Software Engineer (SE)** / Story Engineer
- **Embedded Tester (ET)** / Story Tester

# Responsibility Matrix

ROLES  R = Responsible P = Participates	Ideation			Refinement			Development						Test			Deploy	
	Define Initiative	Refine Initiative	Prioritize Initiative	Define Feature	Refine Feature	Prioritize Feature	Define User Story	Refine User Story	Prioritize User Story	Develop User Story	Test User Story	Accept User Story	Test Feature	Demo Feature	Accept Feature	Deploy	Retro
Requirements Producer	R	P*	P*	P*										P	P*		
Requirements Refiner	P*	R	P*	P	P*	P								P*	R		
Requirements Prioritizer	P	P	R	P*	P*	P*								P*			
Feature Orchestrator			P*	P*	P*	P*			P*					P*		P	
Feature Refiner / Prioritizer		P*	P*	R	R	R	P*	P	P*					R	P	P	
Feature Tester				P*	P	P	P*	P*	P*				R	P*		P*	
Story Orchestrator					P	P	R	R	R	P*	P*	R	P*			R	R
Story Engineer							P*	P	P	R	P	P*	P*			P*	P
Story Tester							P	P	P	P	R	P*	P*	P*			P

\* Recommended if appropriate

# Business Sponsor / Requirements Producer

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## Responsible For:

- Establishing Portfolio Roadmap
- Identifying Business Case
- Creating Demand
- Obtaining VP Sponsor Approval for Demand
- Defining Project Value
- Documenting High Level Requirements
- Owning and Accepting the Demand, Project, and Initiative

## Participates In:

- Ideation
- Intake \*
- Discovery \*
- Demo \*

# Business Sponsor Activity

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- **Identify Business Case**
- **Define Project Value**

## Suggestions

- Relevant, but high-level
- Have fun!
- Examples - Sell OTT to the Space Station

# Business Partner / Product Manager / Requirements Refiner

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## Responsible For:

- Managing the Portfolio Roadmap
- Engaging Impacted Business Units
- Refining Business Requirements
  - Business Value
  - Value Statement
  - Assumptions
  - Acceptance Criteria
  - Business Dependencies
- Owning and Accepting Requirements

## Participates In:

- Ideation
- Intake
- Discovery
- Feature Mapping
- Feature Review
- Deployment Planning \*
- Scrum
- Demo
- Deployment \*
- Retro \*

# Business Partner / Product Manager Activity

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- Identify Business Case
- Define Project Value
- **Document High Level Requirements (2 - 3)**
  - Refine Business Requirements
    - **Business Value**
    - **Value Statement**
    - **Assumptions**
    - **Acceptance Criteria**
    - **Business Dependencies**



# Business Relationship Manager / Requirements Prioritizer

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## Responsible For:

- Collaborating across Lines of Business and Business Portfolios to stack-rank Business Requirements based on:
  - Business Value
  - Level of Effort
  - Return on Investment
  - Dependencies
  - Legal / Contractual Requirements
  - Other Factors

## Participates In:

- Ideation \*
- Intake
- Discovery \*
- Feature Review
- Deployment Planning
- Scrum
- Demo \*
- Retro \*

# Business Relationship Manager Activity

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- Identify Business Case
- Define Project Value
- Document High Level Requirements (2 - 3)
- Refine Business Requirements
- **Stack Rank Business Requirements**
  - **Business Value**
  - **Level of Effort**
  - **Return on Investment**
  - **Dependencies**
  - **Legal / Contractual Requirements**
  - **Other Factors**

# Program Manager / Feature Orchestrator

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## Responsible For:

- Facilitating collaboration and delivery of Features across:
  - Lines of Business
  - Portfolios
  - Products
  - Platforms
  - Applications
  - Development Teams

## Participates In:

- Intake
- Discovery \*
- Feature Mapping \*
- Feature Review
- Deployment Planning
- Scrum
- Demo
- Test
- Deployment
- Retro \*

# Program Manager Activity

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- Identify Business Case
- Define Project Value
- Document High Level Requirements (2 - 3)
- Refine Business Requirements
- Stack Rank Business Requirements
- **Identify Domains / Teams impacted by 2+ Projects and resolve**
  - Sales / Marketing / Retention
  - Front-End / Middleware / Back-End

# Product Owner / Feature Refiner & Prioritizer

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## Responsible For:

- Establishing and Managing the Product / Platform Roadmap
- Collaborating with the Business Partner to convert Business Requirements to Product Features
- Finalizing Feature Scope
- Prioritizing Features in the Product / Platform Backlog
- Refining Features to a 'Dev-Ready' State
- Identifying Feature Milestones

## Participates In:

- Intake
- Discovery
- Feature Mapping
- Feature Review
- Deployment Planning
- Story Mapping \*
- Sprint Planning \*
- Scrum
- Development \*
- Demo
- Test \*
- Deployment
- Retro

# Product Owner Activity

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- Identify Business Case
- Define Project Value
- Document High Level Requirements (2 - 3)
- Refine Business Requirements
- Stack Rank Business Requirements
- Identify Domains / Teams impacted by 2+ Projects and resolve
- **Refine Features to 'Dev-Ready'**

# Quality Assurance / Feature Tester

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## Responsible For:

- Identifying, Creating, and Executing Manual and Automated Regression and Functional Testing at the Feature level
- Verifying successful Test completion satisfies Feature Acceptance Criteria

## Participates In:

- Intake
- Discovery \*
- Feature Mapping \*
- Feature Review
- Deployment Planning
- Scrum
- Demo
- Test
- Deployment
- Retro



# Quality Assurance Activity

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- Identify Business Case
- Define Project Value
- Document High Level Requirements (2 - 3)
- Refine Business Requirements
- Stack Rank Business Requirements
- Identify Domains / Teams impacted by 2+ Projects and resolve
- Refine Features to 'Dev-Ready'
- **Identify Steps to Test to ensure Feature meets Acceptance Criteria**

# Scrum Master / Story Orchestrator

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## Responsible For:

- Breaking down Features into User Stories
- Establishing and Managing the Sprint Backlog
- Removing Obstacles, Impediments, and Distractions from the Sprint
- Facilitating cross-team collaboration
- Communicating progress and completion status to Feature Level
- Driving Agile Best Practices

## Participates In:

- Discovery \*
- Feature Mapping
- Feature Review
- Deployment Planning
- Story Mapping
- Sprint Planning
- Scrum
- Development
- Demo
- Test
- Deployment
- Retro

# Scrum Master Activity

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- Identify Business Case
- Define Project Value
- Document High Level Requirements (2 - 3)
- Refine Business Requirements
- Stack Rank Business Requirements
- Identify Domains / Teams impacted by 2+ Projects and resolve
- Refine Features to 'Dev-Ready'
- Identify Steps to Test to ensure Feature meets Acceptance Criteria
- **Identify User Stories to satisfy Acceptance Criteria in the Feature**

# Software Engineer / Story Engineer

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## Responsible For:

- Developing functional software that satisfies the Acceptance Criteria defined in the User Story
- Identifying, Documenting, and Completing Technical Debt and Story Spikes
- Developing and Executing Unit Tests

## Participates In:

- Feature Review \*
- Story Mapping
- Sprint Planning
- Scrum
- Development
- Demo
- Test
- Deployment \*
- Retro

# Software Engineer Activity

---

- Identify Business Case
- Define Project Value
- Document High Level Requirements (2 - 3)
- Refine Business Requirements
- Stack Rank Business Requirements
- Identify Domains / Teams impacted by 2+ Projects and resolve
- Refine Features to 'Dev-Ready'
- Identify Steps to Test to ensure Feature meets Acceptance Criteria
- Identify User Stories to satisfy Acceptance Criteria in the Feature
- **Identify Unit Tests for User Story**

# Embedded Tester / Story Tester

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## Responsible For:

- Identifying and Documenting Bugs and Defects
- Identifying, Creating, and Executing Manual and Automated Testing at the User Story level

## Participates In:

- Feature Review \*
- Story Mapping
- Sprint Planning
- Scrum
- Development
- Demo
- Test
- Deployment \*
- Retro

# Embedded Tester Activity

---

- Identify Business Case
- Define Project Value
- Document High Level Requirements (2 - 3)
- Refine Business Requirements
- Stack Rank Business Requirements
- Identify Domains / Teams impacted by 2+ Projects and resolve
- Refine Features to 'Dev-Ready'
- Identify Steps to Test to ensure Feature meets Acceptance Criteria
- Identify User Stories to satisfy Acceptance Criteria in the Feature
- Identify Unit Tests for User Story
- **Identify Functional Tests for User Story**



# Mix and Match

## Role:

- **Business Sponsor (BS)**
- **Product Manager (PdM) / Business Partner (BP)**
- **Business Relationship Manager (BRM)**
- **Product Manager (PdM)**
- **Program Manager (PgM)**
- **Product Owner (PO)**
- **Scrum Master (SM)**
- **Developer (Dev)**
- **Embedded Test (ET)**
- **TQA / UAT**

## Responsibility:

\_\_\_\_ Responsible for identifying and understanding impact of Features on Dev Team. Responsibilities include defining, refining, and accepting User Stories, and day-to-day Dev Team execution

\_\_\_\_ Business executive responsible for approving work that impacts their portfolio

\_\_\_\_ Responsible for establishing and driving the Product Vision and Roadmap. Responsibilities include refining, prioritizing, owning, and accepting Features

\_\_\_\_ Responsible for building and executing manual and automated functional and regression tests, smoke tests, and end-to-end user and system functionality tests on Features

\_\_\_\_ Responsible for defining and refining Initiatives, and defining Features. Acts as the business representative on behalf of the Initiatives and Features

\_\_\_\_ Responsible for building and executing manual and automated tests for User Stories

\_\_\_\_ Responsible for driving the completion of Features, User Stories, and Defects across teams

\_\_\_\_ Responsible for developing and delivering functional software that satisfies the Acceptance Criteria defined in the User Story

\_\_\_\_ Responsible for managing the engagement between Business Units and DISH IT, Portfolio Management, Enterprise Prioritization, and Intake

# Parking Lot

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