Continuous Exploration Process

> This document walks through feature discovery, requirements gathering, prioritization, and planning.

Feature Ideas Backlog

Product team members and **stakeholders** put in ideas for features in the Ideas Backlog as *Initiatives* with the status `Idea`. Those ideas should be sorted against the **stakeholder**'s best guess value and value confidence.

> NOTE: The *Ideas Backlog* is the **Backlog** under the **Refinement** backlog in the image above.

Ideas Backlog items can start with only a title. However, before moving to refinement, they should include:

- A problem and impact statement
- An assessment of value and the confidence of that value

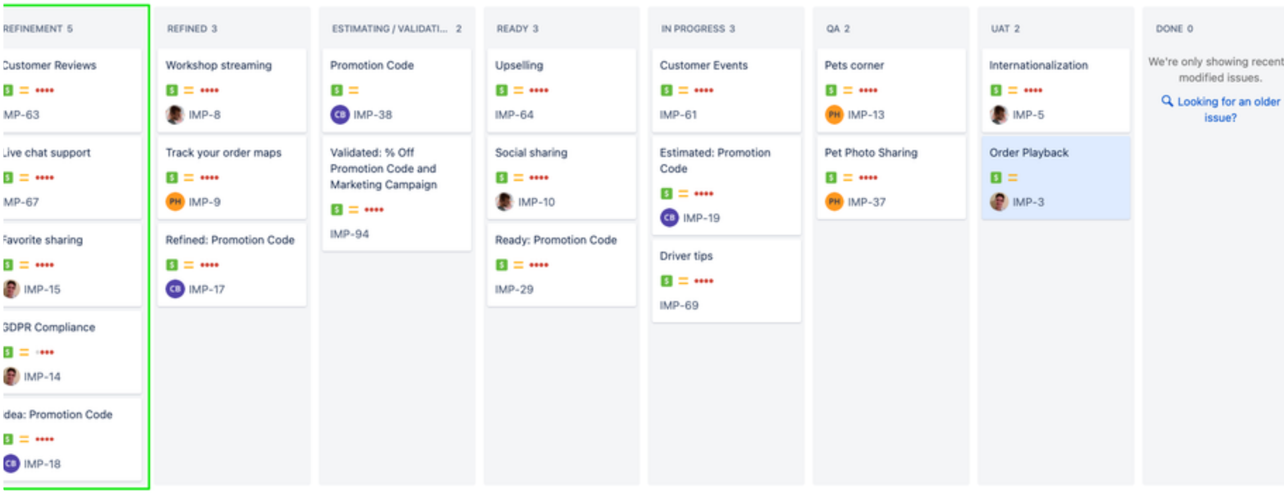
These initiatives will be further refined in the next status `Refinement`.

Refinement

Once the product team and **stakeholders** have prioritized which feature should have its scope refined first, they move the initiative to `Refinement`. In this stage, details are added to the ticket, enabling further prioritization.

This backlog is visible at the top of the Ideas Backlog:

And the backlog is visible in the Continuous Exploration Board.



During refinement, the following is added to the initiative:

- People - who needs to be consulted for this Initiative
- Use Cases - high-level end-to-end steps a customer or others will take once this initiative is complete.
  - Often this will involve wireframes or even high-fidelity mockups to make sure we have the requirements correct before proceeding. ***UX*** epics might take place during this phase.
- Out of scope - use cases that are not part of the initiative
- Considerations - notes on anything important to retain
- Questions - remaining unanswered questions

Once these details have been specified well enough for estimation and validation to occur, the initiative is moved to `Refined`

Refined

The `Refined` column is a “holding” column for initiatives that have been scoped, but not estimated or validated. This column should be prioritized. Program managers will take from the top of this list and then estimate and/or validate the initiative.

Validating

The purpose of validation is to ensure that initiatives will create the value you expect. Product Managers, Product Designers, or UX will attempt to prove out the value of the initiative.

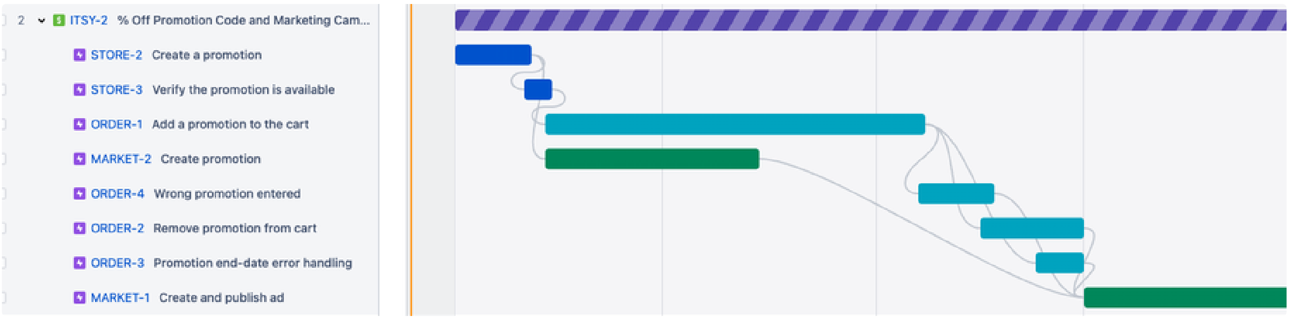
The following fields should be updated after validating:

- Value
- Value Confidence

Estimating

The purpose of estimating is to gauge the costs associated with implementing an initiative. Understanding the costs of an initiative helps perform a cost/benefit assessment and ultimately prioritize the product backlog.

The `Estimating` state culminates when the initiative's epics are all sized, dependencies tracked, and ***plotted***.



By ***plotted*** we mean the total time for the initiative is visible. However, the initiative does not need to be scheduled where we expect it to happen in actual time. It also does not need to be given a release. We *just* need to know how long the initiative is going to take and who is going to need to do work on it.

Once the initiative is estimated and validated, it should be moved to `Ready` and prioritized.

Ready

The `READY` status is used to indicate the *nearly* development-ready initiative backlog. After completing `Estimation`, the `READY` backlog should be strictly prioritized. Here the initiative should be scheduled and given a release.

The `READY` backlog is *nearly* development-ready because while the initiative has well understood epics, but it doesn’t necessarily have stories.

Other Statuses

The other statuses are mostly self explanatory …

- `In Progress` - The feature is in development.
- `QA` - The feature is in QA.
- `UAT` - The feature is being reviewed by users.
- `DONE` - The feature is released to to customers.