

2 Techniques for Estimating Large Backlogs – e.g. When Release Planning

Affinity Estimating (Lowell Lindstrom)

Affinity Estimating is a technique many teams use to quickly and easily estimate (in Story Points) a large number of user stories. This is a great technique if you're just starting a project and have a backlog that hasn't been estimated yet. We started by reading out each Story to the entire team. Lowell then asked us to arrange the stories horizontally on a wall in order of size, without talking. We placed the largest stories on the left and the smallest stories on the right. This only took a few minutes. We were then given a final opportunity to make adjustments to the ordering, again without talking.

Lowell then placed some numbers above the list of stories. In our case, he used the Fibonacci numbers as described by Mike Cohn in "Agile Estimating and Planning". He asked us to group the user stories around the nearest number. After only a few minutes, our team had estimated about 30 User Stories.

"I loved this estimating technique for a number of reasons: It's quick and easy; it feels very natural; and, the entire decision making process is made very visible. Finally, "Affinity Estimating" helps make estimating a positive experience rather than a confrontational one. The next time you have a need to estimate a large number of User Stories, consider trying "Affinity Estimating.""

Bucket Estimating (Jukka Lindström)

A) Before you start using the technique, you first create a the buckets with examples (a scale).

For example just start with two items and ask which one of them is bigger, then add a third item and ask whether that is the same size, smaller, bigger or in between of those two items in size. We've used buckets in sizes of the Fibonacci sequence (just like planning poker cards). BTW when you do this exercise it is better if you have the items written on index cards and create the initial scale on a table - this way the items are easy to move and the scale is easy to create.

When you have the buckets ready (usually 2-3 examples per bucket). It's time to create the physical buckets. I usually have printed out papers with a box within them which we can use in the backlog estimation meetings (part B). I have attached the template that I use to create the buckets.

B) When estimating backlog items, bring the scale with you. Also print or write the items to be estimated on index cards. I really prefer to do this physically, because a very nice characteristic of index cards is that they are easy to move, sort and read.

Then, one by one, assign each new item to a bucket based on the items and examples that already have been assigned into the same bucket. It's very easy and fast to do the comparison. ('Yea, I think it's about the same size as these...' or 'It's somewhat bigger then these, so let's put in the next bucket')

Assigning to the buckets can be done quickly by just comparing and discussing OR you can do it with planning poker to facilitate also discussion about the size. Use the latter especially with new teams.

After the estimation session (or couple of times during the session if it is a long one - say half-a-day or more) go through each of the buckets and see whether the items really are of the same size. If not, move the items that you think are bigger or smaller to the corresponding other bucket.

Anyway the advantages of this in my opinion are:

- it facilitates relative estimation better than planning poker (where you have to 'remember' what estimates you have been given)
- it prevents the estimation inflation or deflation (because the examples don't move from bucket to bucket - with planning poker estimates sometimes inflate or deflate with time, because they are based more on your personal feel of the numbers and their sizes)
- it's very fast

Disadvantages:

- items are sometimes not discussed as thoroughly. Especially if you do not use planning poker with the bucket estimation, might not discuss the differences in opinions about the item.