

Release Criteria: Defining the Rules of the Product Release Game

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Johanna Rothman
Rothman Consulting Group, Inc.
www.jrothman.com
jr@jrothman.com

How Do You Know When the Software Is Ready to Release?

- “Is the software ready yet?”
- What does “done” mean?



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Some Problems We've All Seen

- Test Manager has responsibility
 - You're responsible for deciding if the software is ready to release
 - You know when you're supposed to release, you don't know how good the software has to be
- Our guts do the deciding
 - You can't easily explain why you're not done testing, you just know you're not done yet
 - Release decisions are made by gut feel
- A Higher Authority decides
 - A variety of people can veto the release decision
- You are told to stop testing, the product is being released

Develop Release Criteria

- What's critically important to this project
 - What's special about this release, for the company, for the customers
 - What does success mean?
- Quantify how to recognize success
- Get agreement from project team and senior management that you'll use release criteria to decide if the product is ready to release

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What Does Success Mean for This Project?

- What problem (or problems) is this project trying to solve?
- What are the project's requirements?
 - What problems is this project trying to solve?
 - What are you being paid to deliver?
 - How good does it have to be?
 - When do the customers and the company want it?
 - What are the other constraints?
- What are the product's requirements?
- Then, plan and execute the testing portion of the project

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About Success

- Success is what the customers will be able to do with the project when you're done with it
- Success has nothing to do with defects *per se*
 - Defects are a part of defining success, not the only definition of success
- Caution
 - It's very tempting to define success by what other people do with the release after it's already out ("This release is a success if we sell 10 million copies"), instead of the attributes that help you achieve success ("Performance that allows our customers to perform these activities at a cost of 1 cent per transaction")
- If you find a disconnect about what success means early, you can reconnect

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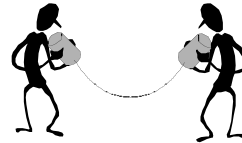
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Use Context Free Questions to Define Success

- What does success look like?
- Why are these results desirable?
- What is the solution worth to you?
- What problems does this system solve?
- What problems could this system create?

- Ask why without asking *WHY*
 - Why might put people on the defensive
- Use How with care to avoid design decisions
- Have a conversation, not an interrogation



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What's Important for This Project?

- Why do customers want this product?
- Define quality
 - “Quality is value to someone” -- Weinberg
 - Each someone wants something different

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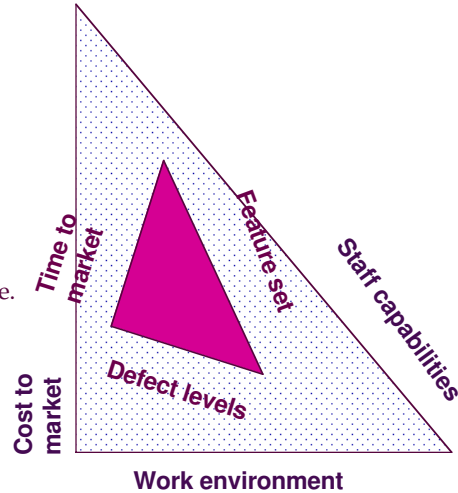
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Software Project Quality Perspectives

- Every project has requirements and constraints
- What do your customers care about the most?
 - Time to market
 - Feature set
 - Defect levels
- Internal Perspectives or Constraints: Your customers don't care about these. You do.
 - Cost to market
 - People and their capabilities
 - Work environment



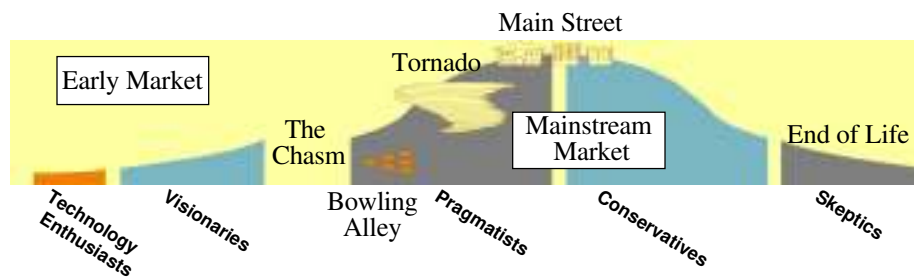
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Different Projects Have Different Customer Pressures for Quality



Introduction	Early Adopters	Mainstream	Late Majority	Skeptics
1. Time to Market	1. Time to Market	1. Low Defects	1. Low Defects	1. Low Defects
2. Feature Set	2. Feature Set	2. Time to Market	2. Feature Set	2. Feature Set
3. Low Defects	3. Low Defects	3. Feature Set	3. Time to Market	3. Time to Market

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Rita's Story

- Originally just the date was the release criterion
- During one project, the product transitioned to the mainstream
 - Release was not well-received by customers

Updated Criteria for the Next Release

- Rita drafted new criteria, a balanced perspective on what was good enough to release
 - All code must compile and build for all platforms.
 - Zero high priority bugs.
 - For all open bugs, documentation in release notes with workarounds.
 - All planned QA tests run, at least 98 percent pass.
 - Number of open defects decreasing for last six weeks.
 - Feature x unit tested by developers, system tested by QA, verified with customers A, B before release.
 - All open defects evaluated by cross-functional team.
 - Ready to release by June 1.

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Gain Consensus on Criteria

- PM explained about other pressures and two favorite customers
- Rita and the PM presented these criteria to the project team:
 - All code must compile and build for all platforms.
 - Zero high priority bugs.
 - For all open bugs, documentation in release notes with workarounds.
 - All planned QA tests run, at least 90 percent pass.
 - Number of open defects decreasing for last three weeks.
 - Feature x unit tested by developers, system tested by QA, verified with customers A, B before release.
 - All open defects evaluated by cross-functional team.
 - Ready to release by June 1.

About Release Criteria

- Objective and measurable (SMART)
 - Specific, Measurable, Attainable, Relevant, Trackable
- Agreed to by entire project team and understood by senior management
- Reasonable
 - Release criteria are not the place for stretch goals
- If you have resistance to release criteria, discover why
 - Assumptions about how projects work
 - Fear of being measured
 -
- Help you resolve those assumptions and fears before you release

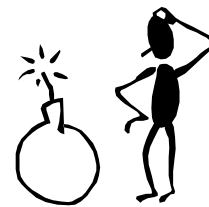
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Other Ways to Gain Consensus on Release Criteria

- Drafting something in advance helps with the discussion
- Develop release criteria at a project team meeting
- Develop release criteria with the PM and then discuss with the project team
- Especially in small organizations, don't leave senior management out of the picture

Working with Senior Management

- Verify that senior management agrees with the release criteria
- Verify that senior management will use the criteria to make the release decision
 - Explain that vetos or early release decisions are inappropriate



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Release Criteria Can Illuminate Testing and Product Goals

- You'll have decisions to make during the release
 - Something will go wrong
 - You won't be able to meet some piece of schedule, feature set, defects, etc.
- Release criteria help you ask some questions:
 - Must we meet this requirement by the requested release date?
 - What is the effect on our customers if we do not meet this requirement by the release date?
 - Will we still meet the release criteria, or do we need to change the criteria?

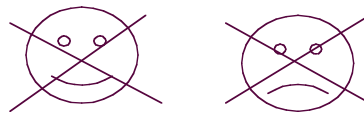
Using Release Criteria

- Evaluate the state of the project's "done-ness" throughout the entire project
- Early warning sign that you're not going to make it

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Release Criteria Are Not Partially Met

- Each criterion is either met or is not met
- I don't do happy faces or happy colors or happy anything
 - Don't confuse release criteria with a testing or project dashboard
- The project team evaluates each criterion, asking, have we met this criterion yet?



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When You Don't Meet the Release Criteria

- Be honest
- Make a conscious decision to release or not
- Make a conscious decision to change the criteria or not
- Decide what to do for the next time

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Summary

- Let the PM take charge of the release criteria
 - Say “Release it” with pride, as a group
 - You’ve met your commitment to your company and to your customers
- Plan your testing well, to take advantage of every minute available
- Use consensus so release criteria are not abandoned under pressure