Release Criteria: Defining the Rules of the Product Release Game

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?
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
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

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
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

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
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

Different Projects Have Different Customer Pressures for Quality

Introduction  Early Adopters  Mainstream  Late Majority  Skeptics
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.
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
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
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?

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