

: What are the INVEST criteria for evaluating project tasks?

by Daniel J. Power

Editor, DSSResources.COM

The Agile Alliance (agilealliance.org/) glossary states "the acronym INVEST helps to remember a widely accepted set of criteria ... to assess the quality of a user story". If a user story fails to meet one of the criteria, the team may want to reword or rewrite it. The glossary defines a good user story as:

"I" ndependent (of all others)

"N" egotiable

"V" aluable

"E" stimable

"S" mall (so as to fit within an iteration)

"T" estable (in principle, even if there isn't a test for it yet).

The INVEST checklist for quickly evaluating user stories originated in an article by Bill Wake (2000), which also repurposed the acronym SMART (Specific, Measurable, Achievable, Relevant, Time-boxed) for tasks resulting from the technical decomposition of user stories. Wake argued INVEST was a good reminder of the characteristics of a good quality product/project backlog item.

In 2004, the INVEST acronym was among the techniques recommended in Mike Cohn's book **User Stories Applied: For Agile Software Development**. Cohn argued "The best way to build software that meets users' needs is begins with "user stories": simple, clear, brief descriptions of functionality that will be valuable to real users." He discusses means for gathering stories, including user interviews, questionnaires, observation, and workshops. For a software project, user stories document desired requirements and features.

A Product Backlog is a list of user stories and product features. It is different than a simple to-do list. First, an item in the Product Backlog must add value for the customer. Second, the entries in the Product Backlog are prioritized and ordered accordingly, Third, the level of detail of an item depends on the position in the Product Backlog, higher priority items have greater detail. Fourth, the Product Backlog is a living, changing document.

: *What are the INVEST criteria for evaluating project tasks?*

Evaluating a project makes sure it is on course for satisfactory completion. So a team lead or manager should monitor and evaluate project tasks using criteria like INVEST before and during the project.

In general, the primary criterion used to evaluate proposed and completed projects should be the value generated for the enterprise, society, and stakeholders. Projects have intended outcomes, results, and features that are perceived by decision-makers and stakeholders. These outcomes should be assessed and evaluated prior to investing and starting a project.

Once a project is completed or "good enough", then it is important to determine if goals and objectives were obtained to determine whether the project produced planned results, delivered expected benefits, delivered value, and/or resulted in the desired change. Overall, the 3 Ps criteria or Triple Bottom Line of 1) People, 2) Planet, and 3) Profits should be used to evaluate proposed and completed projects.

References

Cohn, M., User Stories Applied: For Agile Software Development, 2004.

<https://www.agilealliance.org/glossary/invest>

Author: Daniel Power

Last update: 2020-02-14 10:56