



GET THE RHYTHM



Introduction

Agile Development consists of a series of interdependent planning and delivery rhythms. These agile rhythms, while quite simple conceptually, have proven not so simple to implement. Yet this cyclical series of meetings and events delivers the reliable beat which allows teams to find their own agile rhythm.

While no single publication or presentation delivers all of the ammunition agile teams need to *get the rhythm*, this set of agile meeting and facilitation checklists offers an easy framework to help guide software development teams through the various agile cycles. We hope you find this step-by-step guide valuable.

Sincerely,

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Introduction

Agile Development Rhythms

Strategy

Projects and product development efforts ideally start with a vision associated with a business need or direction. This vision is then typically framed in context of a strategy and associated goals and objectives during a management team planning session. The strategy is often accompanied by supporting materials such as a project charter and funding approval.

Release

Releases represent the large-grained delivery cycle in agile development. Releases typically range between one and six months, but may extend longer in some environments. Releases begin with a release planning meeting where product owners (or product managers, project leads, etc.) work to define and prioritize a candidate set of features that are then estimated by the team.

Iteration

Also known as Sprints, iterations are short, fixed-length subsets of releases, generally in the 1-6 week time frame. Iterations represent the execution heartbeat of the project. During, each iteration the team's goal is to deliver useful software. Iterations incorporate three key meetings: Iteration Planning, Iteration Review and Retrospective.

Daily

Every day the team is focused on completing the highest priority features in the form of working, tested software. As features are delivered within the iteration, they are reviewed and accepted, if appropriate, by the product owner. Each day a short, 15-minute standup meeting facilitates the communication of individual detailed status and any impediments or issues.

Continuous

Agile development teams are constantly driving towards a state of continuous, adaptive planning, collaboration, design, development, testing and integration. This commitment fosters a dynamic, highly productive environment in which automation is critical and the output is always high-quality, valuable working software.



Meeting Checklists Strategy Meeting

Purpose:

The strategy meeting is intended to articulate the project vision and strategy, as well as dive down into an actionable series of goals and objectives. For product companies, one popular method for initially framing the vision is known as the Elevator Pitch:

For: (Our Target Customer)

Who: (Statement of the Need)

The: (Product Name) is a (Product Category)

That: (Product Key Benefit, Compelling Reason to Buy and/or Use)

Unlike: (Primary Competitive Alternative)

Our Product: (Final Statement of Primary Differentiation)

Note: The above can be adapted for internal projects and products.

Review meeting agenda and guidelines Senior Executive and/or Product Owner leads the planning session Vision is presented and discussed in detail Resulting goals and objectives are discussed, reviewed and prioritized Strategic details are organized into a high-level plan(s) or roadmap Key decisions, risks, assumptions and milestone dates are recorded Notes:

Agenda:

Attendees:

Executives, Key Directors and/or Managers,
Product Owners

Inputs:

Understanding of existing strategy, product/projects and technologies

Outputs:

Agreed product or project vision, high level goals and plans and key date considerations

Common Obstacles:

- Senior Executive or Product Owner does not have a well defined vision
- Meeting participants cannot agree on strategic plans
- Necessary decision makers are not present at meeting



Meeting Checklists Release Planning

Purpose:

The release planning meeting is an optional yet highly encouraged session where themes, functional priorities and delivery dates are initially defined. In this meeting the release backlog is identified and estimated at a high level. Based on an initial estimate and/or velocity, a preliminary delivery plan is agreed upon. This plan will be revised over time.

Agenda:

- Review meeting agenda and guidelines
- Product Owner reviews product vision, strategy and goals
- Product Owner reviews key dates and milestones
- Product Owner presents the first cut at the prioritized product backlog
- Team asks questions to understand user stories
- Team estimates user stories at a high level (i.e. story points, ideal days, etc.)
- Team estimates its initial capacity and/or velocity per iteration
- Team finalizes its delivery objectives in the form of a release plan
- Meeting facilitator records any key decisions, assumptions, risks and/or issues
- Stakeholder consensus is achieved and a commitment to proceed is given

Notes:

Attendees:

Product Owner, Product and/or Project Managers, Team Members, Key Stakeholders

Inputs:

Vision and strategy, highlevel goals and plans, prioritized product backlog, key milestone dates

Outputs:

Release plan and backlog, key assumptions and issues, delivery dates

Common Obstacles:

- Inability to negotiate time, scope and budget constraints
- Lack of acceptance of team-based estimation and planning
- Lack of understanding that the plan is not frozen and will change



Meeting Checklists Iteration (Sprint) Planning

Purpose:

The iteration planning meeting is for team members to plan and agree on the stories or backlog items they are confident they can complete during the iteration and identify the detailed tasks and tests for delivery and acceptance.

Agenda:

- Review meeting agenda and guidelines
- Product Owner proposes the product backlog for review
- Product Owner and team review and clarify each item
- Larger stories are broken down as necessary
- Team estimates any resulting new stories
- Team selects the stories they can complete within the iteration
- Team ideally defines the iteration goal or theme
- Team breaks each story into tasks and clearly defined acceptance criteria
- Team estimates each task (typically in hours)
- Team members sign up for tasks initially or during the iteration
- Team may review the workload to make certain it is feasible and balanced
- Product Owner agrees with the work that will be completed

Notes:

Attendees:

Product Owner, Team Members, ScrumMaster and/or Project Manager

Inputs:

Prioritized product backlog, prior velocity, team member capacity and/or schedule risks

Outputs:

Iteration goal, story tasks and acceptance tests, task estimates

Key Considerations:

- The team always has the final say when it comes to estimating
- Every team member should have a vote and/or voice
- Dependencies should be minimized, if not prevented entirely
- The team should consistently identify any impediments preventing them from completing their work that need to be addressed

Common Obstacles:

 Diving into too much detail and designing each feature in full rather than identifying the task work necessary



Meeting Checklists Iteration (Sprint) Review

Purpose:

An iteration review is conducted with the Product Owner to ensure all acceptance criteria of the work completed have been met. Following the review, the team then demonstrates completed functionality to showcase their work to interested stakeholders and/or customers.

Agenda:

- Review meeting agenda and guidelines
- Team walks through completed functionality with Product Owner
- Team identifies any incomplete stories
- The Product Owner moves and/or splits incomplete stories or backlog items into next iteration or back onto product backlog if no longer a priority
- Product Owner closes out iteration and accepts appropriate functionality
- Team demonstrates working software to interested stakeholders
- Any open issues/impediments and action items are noted and assigned

Notes:

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Attendees:

Product Owner, Team, ScrumMaster and/or Project Managers, Stakeholders

Inputs:

Working, tested software

Outputs:

Final acceptance of completed functionality, resolution to any incomplete items, product backlog prepped

Key Considerations:

- "Just say no" to PowerPoint slide decks or feature dissertations
- The Product Owner may decide not to accept certain functionality



Meeting Checklists Retrospective

Purpose:

The retrospective affords the team a dedicated opportunity to collectively evaluate their processes. Retrospective meetings embrace a team's commitment to continuous improvement. The goal of these meetings is to inspect and adapt team practices and processes in an effort to identify and take action on key issues that are impeding the team's progress or health.

Agenda:

Review meeting agenda and guidelines

Team reviews what went well during the last iteration

Team reviews what didn't go as well or as planned during the last iteration & why

Team identifies the most important items or issues to focus on next iteration

Team notes any additional impediments preventing them from adopting and/or improving their process

No	otes:
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Attendees:

Team Members, ScrumMaster and/or Facilitator, Product Owner

Inputs:

Details and accomplishments from the prior iteration, list of issues or impediments

Outputs:

Prioritized impediments or newly identified stories for action in an upcoming iteration

Key Considerations:

- Always remember, and remind the team, that retrospectives are intended to focus on the process and not people
- Whoever facilitates should make an effort to ensure all team members participate



Meeting Checklists Daily Standup

Purpose:

The daily standup is a standing meeting that facilitates team communication. Communicating as a team each day fosters shared responsibility as well as the ability to more rapidly respond to any challenges and changes.

Agenda:

The three questions which are typically addressed by each team member include:

1

What have you done since we last met?



What are you planning to do until we meet again?



What, if any, impediments are you encountering that are preventing you from making forward progress?

N	otes:	

Attendees:

Product Owner, Team Members, ScrumMaster and/or Project Manager, Interested Stakeholders

Inputs:

Individual team member's state of work currently and completed

Outputs:

Team communication and understanding of individual and iteration progress, task status, critical issues or impediments

Key Considerations:

- Only people with work assigned in the iteration should speak.
- Topics outside the 3 questions should be addressed outside this meeting
- The team should report progress to the team as opposed to one member or a ScrumMaster or manager
- Any unaddressed impediments and issues should be noted

Common Obstacles:

- All team members are not present
- Non-core team members consume the meeting with discussion
- Time is spent on general discussion or detailed tangents vs. targeted progress

Getting Started Management Guidelines

As software development teams begin their agile transition, a smooth and consistent tempo can be established very early on via implementation of the following organizational and process considerations:

- Collaborate as a team (or organization) to research and select an agile framework and/or processes that align procedurally and culturally with your organization
- Ensure all teams have access to training and coaching to enable the successful adoption of agile development practices and processes
- Plan and communicate a rollout strategy that accounts for organizational structure, project and team hierarchies, roles and responsibilities and training and education plans
- Institutionalize your planning and delivery cycle (i.e. strategy, release, iteration, daily, continuously) for the organization

- Devise a set of internal guidelines and standards for teams to take advantage of such as:
 - Standard meeting guidelines
 - Planning and estimation standards and units
 - Team definition of "Done"
- Define the initial set of measures (velocity, burndown, cumulative flow, test status, etc.) for planning and tracking progress
- Agree generally on project and team roles and responsibilities
- Establish plans and goals for technical project execution such as:
 - Acceptance criteria strategy
 - Test coverage goals and automation plans
 - Integration and build practices
 - Coding and testing standards
 - Tools and technologies (coding, testing, build, deployment, project management, etc.)

Getting Started Meeting Agenda

Meetings ideally follow a set of guidelines used to facilitate and keep the meeting both on topic and on time. Included is a list of items that may help in the preparation and moderation of your meetings.

Pre-Meeting Establish a meeting purpose and goal Ensure all key participants are invited Publish the agenda at least 24 hours in advance Forward the meeting goal and agenda to each attendee Reserve and prepare all resources for the meeting (rooms, projectors, computers, meeting facilitation toolkit*, etc.)

Meeting & Post-Meeting

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	Review meeting agendas and guidelines at the beginning of each session
	Conduct meeting
	Post meeting results and responsibilities in a visible location for all to see

*Note: A meeting facilitation toolkit often contains the following items:

flip chart, whiteboard markers, pens, index cards, sticky notes, planning
poker cards, talking stick or toy to be held by the person speaking, timer or
stopwatch, masking tape, bell or chime to alert when time is up on a topic.

Getting Started Meeting Schedule

MEETING

Strategy:

Release Planning:

Iteration (Sprint) Planning:

Iteration (Sprint) Review:

Retrospective:

Daily Standup:

FREQUENCY	LENGTH
Typically once a year with periodic incremental updates	4 - 16 hours
1 st day of each release	4 - 8 hours
1 St day of each iteration	2 - 4 hours
Last day of each iteration	1 - 2 hours
Last day of each iteration	1 - 2 hours
Each day at the same place and time	15 minutes