**Sprint Planning Template**

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| Project Title | Project Manager | Customer Name |
| **Descriptive name, including the name of the company you chose and the project in progress** | **Your name** | **Company leader who is listed in the case study** |

Your answers may vary from those listed here, but try to make sure you pinpoint the problems, the people experiencing the problems, how to solve these problems, what good things are happening, what from the backlog you need to focus on in the next sprint, and how to keep your team on the same page.

**A: Retrospective**

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| **Start** | **Stop** | **Continue** |
| * Increase communication between IT teams and leadership * Make sure communication with customers is accurate for project progress * Share project challenges with customers * Make sure all tellers & staff have been properly trained in new software * Update customers in a timely manner of changes in technology | * Running over on daily stand-up meetings, which delays getting our daily work done * Communicating inaccurate info to customers about mobile app | * Working to improve bank infrastructure * Using stand up meetings to keep all staff informed of project progress * Focusing on tasks at hand * Keep close eye on tasks being completed and original task schedule to ensure we make timely progress |
| **What puzzles us?**   * Why do customers think mobile app is live when it is not to be completed until later? * What is causing the meetings to go over scheduled meeting times? * Why has communication broken down between IT staff and banking employees and administration? * Clarify why promotions are currently promoting the mobile app even though it is not going live for 2 more months? | | |

**B: Project Backlog**

Key for User Stories:

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| **Epic** | **Description** |
| A | Teller/Customer service staff | Difficulty is on a scale of 1–10, where 1 is the most difficult and 10 is the easiest. |
| B | Administration stories | Customer priority is on a scale of 1–10, where 1 is the lowest priority and 10 is the highest priority. |
| C | Customer user interface | Score is on a scale of 1–100, where the higher the number, the sooner the story should be addressed. |

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| **Epic** | **User story** | **Item** | **Difficulty** | **Customer priority** | **Score** |
| A | 1 | As a teller, I need access to customer and database data as needed to do my work and answer phone requests. | 6 | 8 | 48 |
| B | 2 | As bank administration, I need to access customer loan data. | 4 | 9 | 36 |
| A | 3 | As a teller, I must be able to access customer bank accounts to fix problems with overdrafts. | 6 | 9 | 54 |
| C | 4 | As a mobile user, I need the interface to provide reliable online banking access to check account balances. | 5 | 9 | 45 |
| A | 7 | As a teller, I must be able to access data to serve customers when they call the bank with questions. | 5 | 8 | 40 |
| C | 5 | As mobile banker, I must be able to pay bills online. | 5 | 7 | 35 |
| C | 8 | My mobile banking app must allow me to deposit checks online. | 5 | 7 | 35 |
| C | 9 | As a mobile banker, I need to be able to send money to my friends to split costs of activities we do together. | 4 | 7 | 28 |
| B | 7 | As a branch manager, I need to see employee transaction reports in order to verify adherence to security policies and award performance bonuses. | 5 | 5 | 25 |
| B | 6 | As bank administrator, I need to access customer credit scores for potential loan applicants. | 3 | 7 | 21 |

**Project progress update:**

User stories A1 and B2 were completed in Sprint 1 and are highlighted in green.

User story C9 has been added as a new desired feature based on the email request from customer Sara Sousa. The score of 4 is due to the relatively high complexity of programming and testing this new feature. It needs to work perfectly before being rolled out. The request comes straight from a customer and shows we are falling behind in the services offered by competitors, thus the impact of 7.

User story B7 has been added, per the request of the teller supervisor. The report will be moderately difficult to put together, thus a difficulty score of 5. The impact is not very high at the moment. For now, the old system can run those weekly reports, but eventually when the transition completes, we will need those supervisor reports.

User stories C4 and A7 have been modified. The customer priority score on C4 was increased from 8 to 9 based on the CEO’s request to address customer complaints, and the user story was slightly rewritten to fit the style guide. The difficulty score of user story A7 was dropped from 6 to 5, indicating that related tasks are proving to be more complicated than we initially thought they might be.

**C: Sprint Plan**

**Goal:**

* A3: Teller access to customer overdraft information
* C4: Ensure the mobile interface is reliable and consistently working well.
* A7: Customer data availability for phone-based inquiries

**Tasks, Forecast, and Resource Allocation:**

* A7: Interview tellers and supervisors to determine the required access to request.

Forecast: Interview/focus group of users—should take 4 days.

Resource(s) needed: Business Analysts (3)

* A3, A7: Set up appropriate profiles for tellers, managers, and admins.

Forecast: Task to create and develop appropriate profiles—should take 3 days.

Resource(s) needed: Database Administrator, Data entry staff.

* A3: Programming of manual override function for overdraft fees, account transfers.

Forecast: Task to code new screen and account management functions—should take 8 days.

Resource(s) needed: Database Administrator, Programmers (2)

* A3, A7: QA testing data access functions

Forecast: Testing and fixing code as needed—should take 2 days.

Resource(s) needed: QA testers (2), Programmer.

* C4: Mobile users accessing account balances

Forecast: Testing should take 5 days at random times during the first two weeks of the sprint.

Resource(s) needed: IT specialist, Trainer, QA tester.

* C4: Make adjustments as needed based on troubleshooting results.

Forecast: Make appropriate coding or hardware fixes, test for continued stability—5 days.

Resource(s) needed: Database Administrator, Programmer, QA tester.

**D: Communication Plan**

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| **Communication Item** | **Owner** | **Audience** | **Timing** | **Purpose** |
| Weekly update report | Project manager | All FRB employees | Sent out each Monday | Keep staff informed of project progress |
| Bi-weekly management update | Project manager | Senior Officers at FRB | Every other Monday | Earned Value Management Update |
| Customer facing website | IT Department | Customers of FRB | Ongoing, updated as changes happen | Keep customers informed of changes to website, mobile app, etc. |
| Mobile app errors | IT Department | Customers of FRB | Immediately | Inform mobile customers that if they find glitches to notify us immediately so the fixes can be prioritized |
| Teller interviews and focus group | IT Department | Tellers and Supervisors | Interviews – over the first two days, focus group day 4 of the sprint | Business analyst holds a series of interviews and then a follow-up focus group based on interview results |