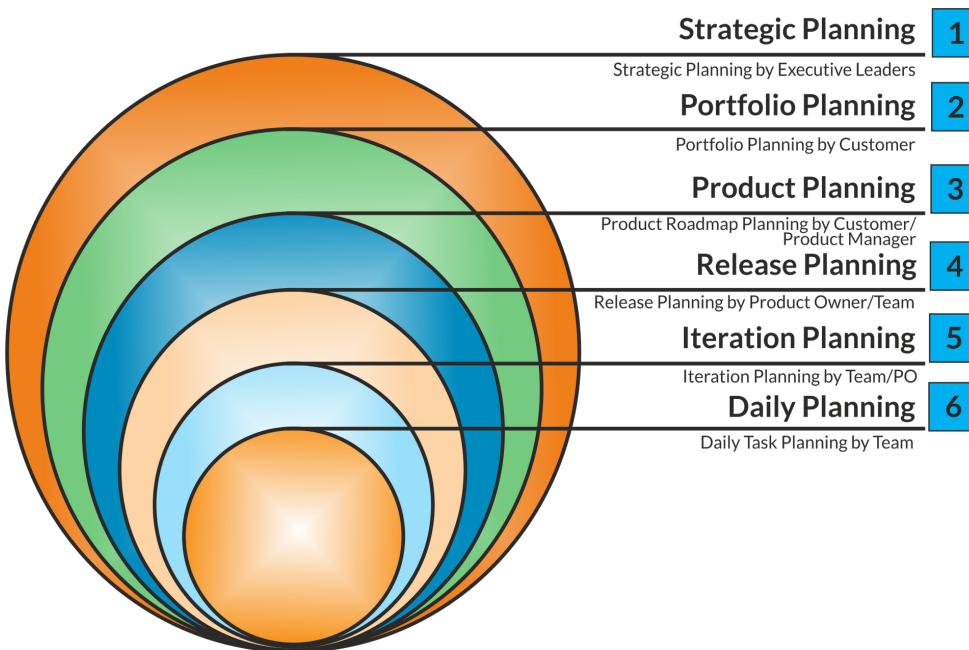


AGILE MEETINGS CHEAT SHEETS

INTRODUCTION

This cheat sheet is a guide (using many Real World practices and tips from Agile practitioners) on how to prepare and execute effective and successful Agile meetings. There are 6 levels of planning in Agile, this cheat sheet covers some of the Visioning activities in level 3 in addition to all the primary Agile meetings in levels 4,5,6 (Release Planning, Iteration Planning and Daily Planning).



We would love to hear your feedback, suggestions and how this information has helped you. Please send your comments to our team at info@agilityhealthradar.com. We hope you find this resource to be valuable on an ongoing basis for your meetings! - Sally and the AgilityHealth team

PROJECT / RELEASE KICKOFF & VISIONING MEETING

MEETING PURPOSE:	For the Product Owner to provide a clear overview of the vision, strategy and deliverables, roadmap desired and perform initial team forming activities.
ATTENDEES:	Product Owner, ScrumMaster, The Team (All roles needed to get a story 'Done' including business SMEs) Should Have: Sponsor, Key Stakeholders
DURATION:	This Initial meeting can take 4 hours
DELIVERABLES:	<ul style="list-style-type: none">• Product Vision Box• Measures of Success (release level acceptance criteria 'Done')• Visioning Artifacts (such as: High Level Process Diagram, Use Case Diagram, UI Flow, Personas)• Product Roadmap (what will we deliver by when?)• Project/Release Risks and Constraints• Team Roles and Expectations (including being Generalizing Specialists)• Consensus on Team Norms (working agreements)• Consensus on Execution Process and Tools

SAMPLE AGENDA:

- ✓ Meeting Purpose and Norms
- ✓ Team Introductions
- ✓ Overview of the Vision
- ✓ Product Vision Box Exercise
- ✓ How Will We Measure Success?
- ✓ Visioning Artifacts
- ✓ Design the Release Roadmap
- ✓ Project/Release Risks and Constraints (Hard dates, costs or risks)
- ✓ Team Roles and Expectations
- ✓ Consensus on Future Team Norms
- ✓ Consensus on Process and Tools
- ✓ Action Items and Closing

FACILITATION TIPS

-  Plan team building activities for new teams
-  Learn and practice 'Visual Modeling'. A picture of their vision is worth a 1000 words so vision by drawing!
-  Visioning artifacts may include: (High Level Process Diagram, Use Case Diagram, UI Flow, Personas)
-  Prepare PO for being positive, inspiring and upbeat during this session
-  Emphasize the concept of Generalizing Specialist
-  Engage everyone in defining their Team Norms
-  Prepare short demos of any tools that will be used if applicable

AGILE MEETINGS CHEAT SHEETS

BACKLOG CREATION – STORY WRITING MEETING

MEETING PURPOSE:	For the PO and team to collaborate on building and prioritizing the backlog of stories for the upcoming one or two releases.
ATTENDEES:	<p>Product Owner, ScrumMaster, The Team (All roles needed to get a story 'Done' including business SMEs)</p> <p>Should Have: Key Stakeholders</p> <p><i>(Remember to invite departments who help setup the foundation for your team during the Foundation/Non-Functional story writing portion)</i></p> <p>Could Have: Sponsor</p>
DURATION:	This meeting can take 4 hours – several days depending on release size
DELIVERABLES:	<ul style="list-style-type: none">• Prioritized Product Backlog (Themes, Features, Stories)• Foundational, Spikes and Change Management Stories*• Storymap*• Updated Roadmap

SAMPLE AGENDA:

- ✓ Meeting Purpose and Norms
- ✓ Review Story Writing Guidelines
- ✓ PO Presents their Initial Story Backlog
- ✓ Team and PO write functional stories (by Persona, Story Map, Brainstorming)
- ✓ Identify Risk/Spike Stories
- ✓ Identify Foundational/Non Functional Stories, Change Mgmt
- ✓ Prioritize/Rank Order the Backlog (Dependency, Risk, MoSCoW, H-M-L, Kano)
- ✓ Update Release Roadmap (R1, R2, R3,...)
- ✓ Consensus, Action Items and Closing

FACILITATION TIPS

- ★ Input: Have PO and Analyst prepare an initial backlog
- ★ Input: Bring in output from Visioning session
- ★ Prepare visuals for Story writing guidelines
- ★ Meeting Norm: Discuss the What not the How
- ★ Meeting Norm: When brainstorming don't evaluate
- ★ Use post-it notes, index cards for brainstorming
- ★ Setup room for team collaboration
- ★ Don't forget a Dependency trumps business value
- ★ Spikes are stories designed to mitigate risk or prove a solution

RELEASE PLANNING & ESTIMATING MEETING

MEETING PURPOSE:

For the PO and the team to collaborate on building an initial guiding plan (number of iterations, estimated velocity, release themes, dates) that provides an initial release plan and foundation for how the team will deliver on the vision.

ATTENDEES:

Product Owner, ScrumMaster, The Team (All roles needed to get a story 'Done' including business SMEs)
Should Have: Key Stakeholders and SMEs
Could Have: Sponsor, Managers

DURATION:

This meeting can take 4 hours – 1 day+ depending on release size

DELIVERABLES:

- Initial Release Plan (knowing it will change)
- Estimated Team Velocity
- Target Release Dates
- Estimated Release Size (Iterations) and or Points Delivered
- Initial Cost Estimates*

SAMPLE AGENDA:

- Meeting Purpose and Norms
- Establish Story Definition of 'Done'
- Review Story Sizing Guidelines
- Size Each Story
(T-Shirt Sizing, Planning Poker, Complexity Buckets)
- Determine Iteration Length
- Calculate Number of Iterations
- Determine Est. Initial Velocity
- Plan for Iteration 0, Buffers and Team Vacations/Holidays
- Calculate Number of Points (best case, realistic, worse case)
- Develop Rough Cost Estimates *
- Share Agile Guidelines for Grooming
- Consensus, Action Items and Closing

FACILITATION TIPS

-  Input: Story Cards printed out from previous work
-  Input: Product Vision Box and Release Goals, Constraints
-  Meeting Norm: 'Just Enough' details to size the story
-  Meeting Norm: Focus on relativity not precision
-  Keep reminding the PO that this plan will evolve
-  Ask the team if they have all the right skills they need
-  Protect the team from outside pressures and ensure PO has the same mindset

ITERATION 0 PLANNING MEETING

MEETING PURPOSE:

For the Team and other departments such as Infrastructure, Security, DBA (any department that helps setup the foundation for the team) to plan out the foundation/setup work needed before a team can execute their first successful iteration.

ATTENDEES:

The ScrumMaster, Team, Technical Leads/Architects, Foundation SMEs Should Have: Infrastructure, Security, DBAs and/or any supporting departments

DURATION:

This meeting can take 1 - 2 hrs

DELIVERABLES:

- Iteration 0 Stories in Ranked Order
- Task List for Iteration 0
- Team Consensus on Iteration Plan

SAMPLE AGENDA:

- ✓ Meeting Purpose and Norms
- ✓ Review Release Plan
- ✓ Review Initial Backlog of Foundational and Non Functional Stories
- ✓ Discuss Dependency, Spikes, Risks
- ✓ Select Stories for this Iteration
- ✓ Breakdown Tasks
- ✓ Review Agile Process Basics (for new folks) (planning, daily standup, review, retrospective)
- ✓ Team Capacity Planning
- ✓ Consensus, Action Items and Closing

FACILITATION TIPS



Input: Initial Foundational and non functional stories



Engage Infrastructure, Security, DBAs or other departments that help setup the foundation



Shared team members usually are multitasking, get strong commitment



Protect the team from overcommitting



Create an Iteration 0 Checklist and Tips

STORY ELABORATION – ITERATION PRE-PLANNING

MEETING PURPOSE:

For the PO and a subset of the team to plan ahead the upcoming stories and elaborate the detailed acceptance criteria as preparation for the next Iteration planning session.

ATTENDEES:

Product Owner, Business Analyst, Tech Lead, Tester
Could Have: ScrumMaster, SMEs, Sponsor*

DURATION:

Plan for about 2 hours per week (depending on the complexity of the stories)

DELIVERABLES:

- Confirmation of stories for the next iteration
- Detailed requirements (acceptance tests, UI Mockup*, Process/Activity Diagram*, Behavior Driven Development tests*, Sample Test Data*)
- Technical risk mitigation action items

SAMPLE AGENDA:

 Meeting Purpose and Norms

 Confirm Stories for Next Iteration

 Elaborate the Stories
(Start with screen mockup or process diagram (something visual) then define clear acceptance tests and business rules)

 Discuss Potential Impediments and Action Plan to Manage Them

 Consensus, Action Items and Closing

FACILITATION TIPS



Input: Release Plan



Input: Stakeholder's needs/expectations



Schedule this early, shortly after the current planning meeting



PO should reach out to stakeholders and get input



PO should work closely with sponsor to confirm alignment



Tech Lead should foresee technical impediments

AGILE MEETINGS CHEAT SHEETS

SPRINT/ITERATION PLANNING MEETING

MEETING PURPOSE:

For the PO and the team to plan the current iteration/sprint by agreeing on target stories, confirming acceptance criteria, confirming expectations, breaking down the work into tasks and confirming capacity and target completion goals

ATTENDEES:

Product Owner, ScrumMaster, The Team (All roles needed to get a story 'Done' including business SMEs)
Should Have: Shared members (allocated for short duration work during this sprint)

DURATION:

This meeting can take 2 - 4 hours (the more you improve pre-planning the faster this meeting goes! Start with 4 hrs then scale down when feasible)

DELIVERABLES:

- Prioritized Stories for this Iteration
- Acceptance Criteria for Each Story
- Story Elaboration Artifacts
- Story Tasks
- Sprint Goal/Theme (what goal/objective are we trying to accomplish?)

SAMPLE AGENDA:

- ✓ Meeting Purpose and Norms
- ✓ Re-Plan any 'Not Done' Work from Previous Iteration (if prioritized by PO)
- ✓ PO Presents Top Stories
- ✓ PO/Team Defines an Iteration Goal/Theme
- ✓ PO Clarifies Each Story's Details
- ✓ Team May Resize or Slice Story
- ✓ Team Breaks Story into Tasks
- ✓ Team Sizes Each Task
- ✓ Team Reviews Capacity
- ✓ PO/Team Consensus on Iteration Goal
- ✓ Team Updates their Wall/Board*
- ✓ Action Items and Closing

FACILITATION TIPS

-  Input: Backlog and Release Plan
-  Input: Pre-Planning Work (Story Elaboration)
-  FOCUS on quality and detailed acceptance criteria
-  Try BDD Format 'Given .. When .. Then ..'
-  Use 'real' scenarios and data to confirm acceptance test understanding
-  Use "Yesterday's Weather" for teams that always overcommit
-  Protect the team from PO or Mgmt pressures - remind of Sustainable Pace

AGILE MEETINGS CHEAT SHEETS

DAILY STANDUP MEETING

MEETING PURPOSE:

For the Team to communicate with each other daily on progress, impediments, dependencies and foster a culture of shared responsibility and visibility.
This is not a status report meeting to the ScrumMaster or Mgmt!

ATTENDEES:

Product Owner, ScrumMaster, The Team
Should Have: Shared members from other areas who have active tasks
Could Have: Sponsor, Managers, Stakeholders (they can attend to observe but they can not speak during the standup)

DURATION:

15 Min. Anything longer is a sign of dysfunction

DELIVERABLES:

- Everyone has a chance to share their progress
- Impediments list updated and owner identified
- Parking lot items for post standup discussion

SAMPLE AGENDA:

Review Standup Norms

Person/Task Based Standup (standard): - What did I complete yesterday? - What am I working on today? - Here is what is stopping/slowing me

Alternative Standup – Story Based: Walk the wall/board starting from highest priority/ranked story and answer: - What is remaining to get this Story 'Done'? (ETA?) - Who can help with this Story? - What impediments does it have?

Parking Lot for Post Standup Conversations

FACILITATION TIPS



Input: Visible task wall or electronic task wall



Review standup team norms created by the team



Encourage creative ways for team to reward themselves for following their norms



Stand with the team not in front of them



Address dysfunctional behavior



Listen for hidden impediments



Improve standup meeting quality during retrospectives

BACKLOG GROOMING MEETING

MEETING PURPOSE:

For the PO to groom the backlog by adding, removing, reprioritizing, rewording, slicing and planning ahead for stories so that the backlog and release plan are always reflecting the desired future state.

ATTENDEES:

Product Owner, ScrumMaster, Business Analyst, Tech Lead

Could Have: anyone else that could contribute to the grooming effort

DURATION:

Could spend 2+ hours per week (depends on complexity and volatility of backlog)

(The story elaboration/ pre-planning meeting described earlier is sometimes also referred to as Grooming)

DELIVERABLES:

- Updated Backlog
- Updated Release Plan *
- Updated Roadmap *
- Emerging Risks and Mitigation Strategy*

SAMPLE AGENDA:

 PO states his/her goal for this session

 PO and participants review the backlog and identify areas for improvement

 PO grooms the backlog:

- writes new stories
- slices existing stories
- update story wording
- move stories up or down in priority

 PO reviews upcoming iterations and plans ahead for next goals

 Action items and closing

FACILITATION TIPS



Input: Current Product Backlog and Release Plan



PO Should come in with a goal in mind 'I want to accomplish x'



Limit stakeholder participation to a small number



Schedule this as a standing 1- 2 hr meeting each week



Spend time planning ahead for the next few iterations/release



Keep an eye on team's velocity to derive realistic future goals

AGILE MEETINGS CHEAT SHEETS

SPRINT REVIEW / DEMO MEETING

MEETING PURPOSE:

Part 1 (the Review): For the PO to review all the stories and confirm acceptance criteria have been met. PO accepts or rejects the story as 'Done' (typically performed one day before the demo)
Part 2 (the Demo): For the PO and team to showcase to the Sponsor and other Stakeholders what they have completed in this iteration, solicit their feedback and celebrate success.

ATTENDEES:

Product Owner, ScrumMaster, The Team
Demo Should Have: Sponsor, Stakeholders, Managers
Demo Could Have: Anyone interested in seeing the team's progress

DURATION:

The Sprint Review could take 1 - 2 hrs
The Demo could take 1 hr with 30 - 40 min prep

DELIVERABLES:

Sprint Review:

- PO accepts or rejects stories

Demo:

- PO and team showcase completed functionality
- Input/feedback from sponsor and stakeholders

SAMPLE AGENDA:

- ✓ Meeting Purpose and Norms
- ✓ Welcome Attendees
- ✓ Introduce the Team, Celebrate and Recognize their Hard Work
- ✓ PO Reviews the Overall Vision and Current Release Goals
- ✓ PO Shares Goal for Current Iteration
- ✓ Team Demonstrates 'Done' Stories
- ✓ PO Solicits Sponsor/Stakeholder Q&A
- ✓ PO Shares Next Iteration Goal
- ✓ PO Thanks Everyone for Attending
- ✓ Document Feedback and Action Items

FACILITATION TIPS



Schedule 30min - 1hr to prepare / rehearse for Demo



Invite sponsor and communicate to them importance of attending



Only demonstrate stories that are 'Done'



Non software stories can also be demonstrated/reviewed



Keep the meeting upbeat, positive, fun

SPRINT RETROSPECTIVE MEETING

MEETING PURPOSE:

For the PO and the team to dig deep into their processes, team dynamics and deliverables so they can celebrate success and identify improvements. A retrospective must result in concrete action items for the next iteration.

ATTENDEES:

Product Owner, ScrumMaster, The Team

Could Have: anyone the team wants to invite to contribute, observe or listen to the team and help address their impediments or share their success

DURATION:

This meeting can take 1 – 2 hrs

DELIVERABLES:

- Update on action items from previous retrospective
- Current list of Working Well items
- Current list of Needs Improvement
- Action items for top improvements selected for next iteration
- Output from Retrospective Exercises (Examples: team radar, force field analysis, anonymous Top 5, appreciation game, mad sad glad, happiness meter)

Read: Agile Retrospectives – Making Good Teams Great

SAMPLE AGENDA:

- ✓ Meeting Purpose
- ✓ Discuss Effective Retrospective Norms
- ✓ Team Identifies a Focus Area
- ✓ Gather Data (see the list of exercises above)
- ✓ Group Related Items on the Wall/Retro Board
- ✓ Circle and Name the Groups
- ✓ Vote for Top X Groups/Areas
- ✓ Root Cause Analysis
- ✓ Brainstorm Top Solutions
- ✓ Create Action Items
- ✓ Add to Iteration Plan
- ✓ Create Big Visible Chart (could be a virtual chart)
- ✓ Meeting Retrospective, Closing

FACILITATION TIPS



Input: Action items from previous retrospective



Set the context for a healthy open retrospective through team norms



Address team dynamics not just process



Celebrate success, try the appreciation game



Try different flavors of games from retrospectivewiki.org



Engage everyone, watch for 'going through the motion' participation



MUST follow through with improvements!

TEAMHEALTH RETROSPECTIVE ASSESSMENT MEETING

MEETING PURPOSE:	For the Team to have a deep-dive strategic retrospective that focuses on the top areas that affect team performance/health and develop an actionable growth plan.
ATTENDEES:	Product Owner, ScrumMaster, The Team Could Have: anyone the team wants to invite to contribute, observe or listen to the team and help address their impediments or share their success
DURATION:	This meeting can take 2.5 – 3 hrs. Repeat once a quarter/release
DELIVERABLES:	<ul style="list-style-type: none">• Completion of the TeamHealth Radar assessment• Analysis of the results• Facilitation of 'real' team conversations• Team Growth Plan with actionable deliverables for the next quarter• Optional: Follow up recommendations on custom training, coaching, or specific growth portal content to review.

SAMPLE AGENDA:

- ✓ Meeting Purpose and Norms
- ✓ *Review Previous Growth Items progress
- ✓ Introduce the 5 TeamHealth Dimensions
- ✓ Take Assessment
- ✓ 10 min Break (Review Results)
- ✓ Analyze and Discuss Radar Results (together as a team)
- ✓ Review Textual Responses
- ✓ Facilitate a 'Real' & Open Conversation
- ✓ Build the Team's Growth Plan (together as a team)
- ✓ Add 'Organizational' Growth Items (together as a team)
- ✓ Meeting Retrospective and Closure

FACILITATION TIPS

-  Input: Growth Items from previous retrospective
-  Prepare the team for a healthy open retrospective through team norms
-  Dig deeper into dynamics and org growth areas
-  Celebrate success
-  Keep growth plan to a manageable and actionable list
-  Protest any private textual responses/comments
-  MUST follow through with improvements through iteration