

## Purpose and Agenda

### Purpose

The purpose of iteration planning is to define, organize, and commit to the work the team will do for the iteration. Most teams timebox an hour for this meeting, but new teams may need longer as they create a working pattern. Scrum masters and team coaches typically facilitate iteration planning for the team, but product owners (POs) may sometimes lead this event.

### Agenda

A traditional agenda for iteration planning includes:

#### [Five minutes] Closing out the previous iteration

Make sure that all the stories the team had been working on in the previous iteration are moved to the completed or accepted column of the SAFe team Kanban. If any stories remain, plan for what iteration they may move to and who will work on them.

#### [Five minutes] Establishing team capacity

The team can quantify the time they have to perform work in this iteration by having each team member acknowledge any time off or unavailable time for other duties. Some teams have a shared capacity tracker to help visualize this. Then, using their historical velocity as a starting point, the team makes adjustments based on the unavailable time for each team member to determine the actual capacity for the iteration.

#### [20-30 minutes] Analyzing and estimating stories

In conversation with the PO, the team selects the most valuable stories for work; typically, stories that move the team closer to meeting PI objectives and ensure dependencies with other teams are met. Each story that may be moved from the backlog to this iteration should be discussed, covering relative difficulty, size, complexity, uncertainty, technical challenges, and acceptance criteria. Planning stops once the team runs out of capacity.

#### [5-10 minutes] Developing iteration goals

The team now synthesizes the work they have planned into iteration goals that summarize the work the team plans to accomplish this iteration. *Note: Some teams start this meeting with iteration goals and then work on capacity, story analysis and estimating to support those goals.*

#### Committing to iteration goals

Next, revisit and restate the iteration goals if needed. Then, the team commits to those goals, often with a team vote (Roman voting, fist of five, etc.).

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## Preparation Checklist

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### Location and time

- ☐ **Set up a regular cadence to hold iteration planning.**  
Make sure this meeting is held at a time everyone on the team knows about and can attend.
- ☐ **Check the team's backlog.**  
Make sure there are sufficient stories to pull from for the upcoming iteration.
- ☐ **If using a team capacity tracker:**  
Ensure that it accounts for any known holidays or days off that team members have submitted so that capacity for the iteration is current.
- ☐ **Review the team PI objectives committed to in PI planning.**  
Consider what features are planned for the upcoming iteration so you can work with the team on prioritizing stories that will support feature releases and PI objectives.

### Expected outcomes

- ☐ **Stories are planned for the upcoming iteration**
- ☐ **Committed iteration goals**
- ☐ **Dependencies with other teams are confirmed/handled**

### Post-event actions

- ☐ **Adjust team capacity** if any team members announce new activities (days off, etc.) that will change their capacity
- ☐ **Share new iteration goals** on any communication channels the organization uses to visualize goals
- ☐ **Make sure the team's work management tool is up to date** with the iteration plan
- ☐ **Plan any conversations with teams** that will do work your team is dependent on, or any teams looking to your team for work

## Tips and Tricks

### Facilitating remotely

**SAFe guidance suggests that this meeting should be 4 hours or less.**

However, in a remote meeting, try to limit this further or offer breaks.

**Make sure work being planned** can be visualized remotely by all team members.

**Whoever is writing the iteration goals** should share their screen so that everyone can see the goals as they're being developed.

**Find a remote-friendly way to hold a team vote of confidence** and be sure to discuss any votes lower than a three with curiosity and no judgement.

**In remote meetings, it is easy for quieter teammates to speak up less.** Be sure you are asking everyone if they are comfortable with the work they are planning for the next iteration.

### Using this meeting creatively

**Play fun music softly** while your team is closing out the previous iteration or writing stories.

**Celebrate as a team when you plan under capacity**, allowing for unplanned work. You may hand out stickers, have a special snack, or update a team metric of "X many iterations since we've been over capacity."

**This meeting can be an hour or more** — encourage team members to bring snacks or take a team break to stand, stretch, or have a one-minute dance party.

**Fist of five always works** for a commitment vote, but you can find other ways to hold a vote such as voting by emoji, color, or even using a subset of the estimating poker cards.

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## Overcoming Challenges

Let's face it; not everything goes perfectly all the time. In a fast-paced business environment, change is the only constant. It can be difficult to move your team forward when disagreements or conflicts occur. Below are some common areas where scrum masters or team coaches can succeed in the face of adversity.

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### POTENTIAL ISSUES

#### The entire team is routinely over capacity

##### Ways to overcome:

Present data to the team demonstrating how often the team is planning over capacity, or work that doesn't get completed or carries over when the team is over capacity. As a team, brainstorm how you can address this issue together. Individuals will capture their ideas and decide on action items to take into upcoming iteration planning. Ask the team to act as accountability partners to one another as you plan the next iteration using those action items.

#### One team member is routinely over capacity

##### Ways to overcome:

Work as a team to identify stories that can wait, be broken down, or be taken by someone else so that a single team member is not overloaded or experiencing burnout. Pairing to increase T-shaped skills with other team members may decrease a skills bottleneck on one team member over time.

#### One teammate offers a confidence vote lower than 3

##### Ways to overcome:

This is not an issue at all, but instead, a sign your team is sharing their thoughts authentically. Make sure to ask what the reason for their confidence votes are with curiosity, to work with the team to avoid judgment, and to listen carefully. Then, guide the team to work together to clear up any concerns before voting again.