**Team Planning Tool**

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Current Sprint = 6

**TOC**

|  |  |
| --- | --- |
| **Page** | **Content** |
| 1 | TOC |
| 2 | Introduction |
| 3 | Abbreviations |
| 4 | Status Values |
| 5 | Page Definitions / Tool Notes |
| 5 | Other Notes |
| 5+ | Long Notes |

**Introduction**

This section outlines use guidelines for the planning document.

Abbreviations:

* BC = Blank Correspondence
* FP = Form Paragraph
* CFP = Custom Form Paragraph

Status Values

* Not Started
* EIP: Elaboration in Progress
* Elab Done
* WIP: Work in Progress
* IPR: Integration, Integration Testing, and Peer Review
* DAS: Done as Secondary
* DAT: Done as Technical
* IIT: In Internal Testing
* RFIT: Returned From Internal Testing
* UAT: In User Acceptance Testing
* RFUAT: Returned From UAT
* Accepted

Quick Note Values:

* VETA: We need to verify the ETA
* RISK: There is a significant chance it will not be completed
* PUSHING: The item will be moved to another sprint
* DELETE: The item will be deleted
* QUESTION
* SECONDARY: The BC team is the secondary owner of this item. It has a priority over primary stories, but we do not send to internal testing and follow through on acceptance.
* Carryover: The item is carried over from the previous sprint and takes a higher priority.
* TECH: The item is technical and has a lower priority.
* DEP[=Indicator]: This story has a dependency on something external to the team before it can be completed.
  + Usually the indicator is a developer type or name.
  + Eg DEP=Avinash means we need Avinash to complete some work before the BC team can become submit to IT.
  + Eg DEP=BE means the OC team requires a yet unspecified back-end developer to complete the story.
* WF: Requires a wireframe
* AC: The AC is not understood or an update is requested.
* MAKEBZ: Used to indicate that we are tracking a ticket as a Goodie because it has no ticket number in another system, but it is really a bug not a Goodie.

Item Types:

* US: User Story tracked in Rally.
* DE: Defect tracked in Rally.
* BZ: Bugzilla Defect tracked in Bugzilla.
* GD: Goodies, or optional tasks that benefit or interest developers although they are not required by the client. Tracked in the Team Planning Sheet.

Other Notes:

* This document is used in conjunction with the Team Planning Sheet.
  + It should be found as a sibling to the folder containing this document.
  + It should be named as team-planning-sheet.xlsx
* Elab Backlog summarizes expected stories in the sprint after the current sprint
* The Elab Backlog may contain later-sprint planning tools as line items
* The Backlog Notes section can contain notes for any stories in the Backlog or Elab Backlog
* Estimate of Effort (“EOE”) Days are estimated at 1.5x the true estimate of hours needed to code. This is to account for:
  + Estimate error risk,
  + Time for meetings, regression fixes, and smoke test fixes. Multiply by 8 for an hourly estimate
  + Writing Unit Tests
* Short Name can be prefixed with “Group:” to indicate that several items will be resolved by the same tasks or code. In this case the EOE Days should be 0 for all siblings and the total should appear in the main ticket line item.

**Page Definitions / Tool Notes**

Availability

* It’s supposed to estimate availability and compare against actuals
* But, I think it’s too fine grain and doesn’t stay updated
* Probably we can delete and just use notes under the EOE tab
* It’s still a good idea during the retro to compare prior estimated vs actual availability, so we can account for error going forward

MSP

* Multi-sprint planning
* Cross-sprint data which basically shows historic capacity and the relationship between capacity and acceptance

EOE[-S#]

* Detailed Estimate of Effort for a given sprint
* A key planning tool
* Identifies tasks which were known before the sprint started, assigns developers, notes testers
* Basic notes uncovered during elab
* EOE has a cost/price and also an income/budget.
  + The EOE budget is based on developer availability and performance.
  + The EOE cost is based on the estimate of the assigned developer.
  + The point value of a task is a rough EOE following an exponential schedule using the Fibonacci sequence, based on a conservative, opt-in, consensus agreement of developers and SMEs, assuming the work of an average-performant developer with full availability.

WCS

* Working Capacity Schedule
* A key daily scrum tool
* Based on EOE and priority, we can construct an initial delivery schedule
* As we go along, we continually report status on each item by referring to this WCS

ITW

* Immediate Task Worksheet
* A key tool to organize crunch time chaos
* During crunch time a managing agent will perform “rounds” every period. An hour is a suggested period.
* During a round, the status will be verified and the ETA can be updated if needed.

Elab Backlog

* The backlog of items we anticipate in the subsequent sprint
* When developers complete current sprint work they can begin working elab backlog stuff

Backlog

* Items the team anticipates in later sprints. They are not actively being worked, but we can preserve any notes about them we have.

EOE Days have are estimated at 1.5x the true estimate of hours needed to code. This is to account for A) estimate error risk, and B) time for meetings, regression fixes, and smoke test fixes. Multiply by 8 for an hourly estimate.

**Other Notes**

**Long Notes**