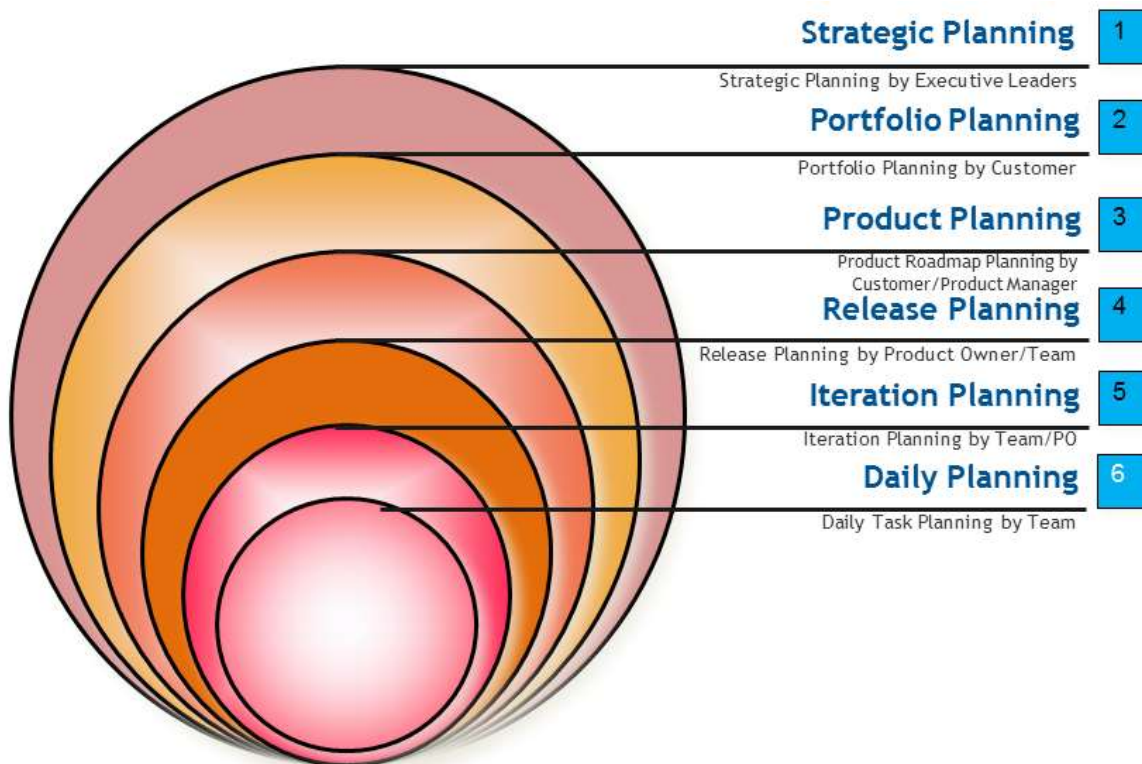


Introduction

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).



I would love to hear your feedback, suggestions and how it has helped you so please contact me at Sally@AgileTraining.com

I hope you find this resource to be valuable and useful on an ongoing base for your Agile meetings! - Sally

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 (<i>All roles needed to get a story 'Done' including business SMEs</i>) Could Have: Sponsor, Key Stakeholders
Duration:	This Initial meeting can take 4 hours
Deliverables:	<input type="checkbox"/> Product Vision Box <input type="checkbox"/> Measures of Success (release level acceptance criteria 'Done') <input type="checkbox"/> Visioning Artifacts (such as: High Level Process Diagram, Use Case Diagram, UI Flow, Personas) <input type="checkbox"/> Product Roadmap (what will we deliver by when?) <input type="checkbox"/> Project/Release Risks and Constraints <input type="checkbox"/> Team Roles and Expectations (including being Generalizing Specialists) <input type="checkbox"/> Consensus on Team Norms (working agreements) <input type="checkbox"/> 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










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:	Product Owner, ScrumMaster, The Team (<i>All roles needed to get a story 'Done' including business SMEs</i>) Should Have: Key Stakeholders (<i>Remember to invite departments who help setup the foundation for your team during the Foundation/Non-Functional story writing portion</i>) Could Have: Sponsor
Duration:	This meeting can take 4 hours – several days depending on release size
Deliverables:	<input type="checkbox"/> Prioritized Product Backlog (Themes, Features, Stories) <input type="checkbox"/> Foundational, Spikes and Change Management Stories* <input type="checkbox"/> Storymap * <input type="checkbox"/> Updated Roadmap

Sample Agenda:

- ☐ Meeting Purpose and Norms
- ☐ Review Story Writing Guidelines
- ☐ PO Presents their Initial Story Backlog*
- ☐ Participants Write New/Missing Stories (*Personas, Story Map, Brainstorming*)
- ☐ Prioritize/Rank Order the Backlog (*Dependency, MoSCoW, H-M-L, Kano*)
- ☐ Story Slicing for EPICs in Next Release
- ☐ Update Release Roadmap (*R1, R2, R3...*)
- ☐ Identify Risk/Spike Stories
- ☐ Identify Foundational/ Non-Functional Stories, Change Mgmt
- ☐ Adjust Backlog/Ranking with New Stories
- ☐ 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 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 rough plan (number of iterations, estimated velocity, release themes, dates) that provides a clear roadmap and foundation for how the team will deliver on the vision.
Attendees:	Product Owner, ScrumMaster, The Team (<i>All roles needed to get a story 'Done' including business SMEs</i>) Should Have: Key Stakeholders and SMEs Could Have: Sponsor, Managers
Duration:	This meeting can take 4 hours – 1 day+ depending on release size
Deliverables:	<input type="checkbox"/> Initial Release Plan (knowing it will change) <input type="checkbox"/> Estimated Team Velocity <input type="checkbox"/> Target Release Dates <input type="checkbox"/> Estimated Release During (Iterations) and or Points Delivered <input type="checkbox"/> 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 PO or outside pressures

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 Could Have: The PO
Duration:	This meeting can take 1 – 2 hrs
Deliverables:	<input type="checkbox"/> Iteration 0 Stories in Ranked Order <input type="checkbox"/> Task List for Iteration 0 <input type="checkbox"/> Team Commitment

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 Commitment
- ☐ 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 over-committing



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 hrs/week (so 4 hrs of pre-planning in a 2 week iteration)
Deliverables:	<input type="checkbox"/> Confirmation of stories for the next iteration <input type="checkbox"/> Detailed requirements (acceptance tests, UI Mockup*, Process/Activity Diagram*, Behavior Driven Development tests*, Sample Test Data*) <input type="checkbox"/> 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








Sprint/Iteration Planning Meeting

Meeting Purpose:	For the PO and the team to plan the current iteration/sprint by selecting the stories, confirming expectations, breaking down the work into tasks and confirming capacity and target completion goals.
Attendees:	Product Owner, ScrumMaster, The Team (<i>All roles needed to get a story 'Done' including business SMEs</i>) 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!)
Deliverables:	<input type="checkbox"/> Prioritized Stories for this Iteration <input type="checkbox"/> Acceptance Criteria for Each Story <input type="checkbox"/> Story Elaboration Artifacts <input type="checkbox"/> Story Tasks <input type="checkbox"/> Sprint Goal/Theme (<i>what goal/objective are we trying to accomplish?</i>)

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 *
- ☐ 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 each day on progress, roadblocks, dependencies and foster a culture of shared responsibility. <i>This is not a status report meeting to the ScrumMaster or Mgmt!</i>
Attendees:	Product Owner, ScrumMaster, The Team Should Have: Shared members from other areas who have active tasks Could Have: Sponsor, Managers, Stakeholders (<i>but they can't speak 😊</i>)
Duration:	15 Min. Anything longer is a sign of dysfunction
Deliverables:	<input type="checkbox"/> Everyone has a chance to share their progress <input type="checkbox"/> Impediments list updated and owner identified <input type="checkbox"/> 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 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 is 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 1 or 2 hours per Iteration <i>(The story elaboration/ pre-planning meeting described earlier is sometimes also referred to as Grooming)</i>
Deliverables:	<input type="checkbox"/> Updated Backlog <input type="checkbox"/> Updated Release Plan * <input type="checkbox"/> Updated Roadmap *

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 closure

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

Sprint Review / Demo Meeting

Meeting Purpose:	<p>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' <i>(typically performed one day before the demo)</i></p> <p>Part 2 (the Demo): For the PO and team to showcase to the Sponsor and other Stakeholders what they have completed in this iteration and solicit their feedback.</p>
Attendees:	<p>Product Owner, ScrumMaster, The Team</p> <p>Demo Should Have: Sponsor, Stakeholders, Managers</p> <p>Demo Could Have: Anyone interested in seeing the team's progress</p>
Duration:	<p>The Sprint Review could take 1 – 2 hrs</p> <p>The Demo could take 1 hr with 30 - 40 min prep</p>
Deliverables:	<p>Sprint Review:</p> <ul style="list-style-type: none"> <input type="checkbox"/> PO accepts or rejects stories <p>Demo:</p> <ul style="list-style-type: none"> <input type="checkbox"/> PO and team showcase completed functionality <input type="checkbox"/> Input/feedback from sponsor and stakeholders

Sample Agenda for the Demo:

- ☐ 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 collaborate on inspecting and evaluating their process and identify top areas that are working well and need improvement; A retrospective must result in concrete action items.
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:	<input type="checkbox"/> Update on action items from previous retrospective <input type="checkbox"/> Current list of Working Well items <input type="checkbox"/> Current list of Needs Improvement <input type="checkbox"/> Action items for top improvements selected for next iteration <input type="checkbox"/> Output from Retrospective Exercises (Examples: team radar, force field analysis, anonymous Top 5, appreciation game, mad sad glad, happiness meter) <i>Read: Agile Retrospectives – Making Good Teams Great</i>

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
- ☐ 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
- ☐ Meeting Retrospective, Closure

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!