



ForecastTM

Sprint Planning Do's & Don'ts

The Ultimate Handbook



Introduction

Sprints lie at the very heart of agile scrum. This agile framework has proven to work for thousands, if not millions of teams already, fostering people to get more done and management to fast-forward their inert projects. If you are looking to improve your sprint planning skills or have never run a sprint, we've got your back with this handbook. Here you'll find both – the basics and foolproof expert advice to kick off your sprints confidently.

Why Work in Sprints

Among others, scrum is an agile framework that reigns supreme and continues to gain momentum. According to 2020's Annual State of Agile Report¹, scrum is the most widely practiced agile method, with at least 75% of respondents practicing scrum or a hybrid that includes scrum.

The benefits of implementing agile practices have also been well-documented. During the last couple of years, agile has helped many organizations manage changing priorities and improve project visibility among other benefits, such as business alignment, time to market, and increased team productivity. More importantly, 26% of organizations participating in the above survey also noted project cost reduction as an important reason for adopting agile.

¹ <https://stateofagile.com/>

What is a sprint?

A sprint is a timeboxed period during which specific tasks must be completed based on what the scrum team has prioritized to deliver to the end user. They introduce a way to break down the project into smaller packages of work, so instead of having a never-ending list of to-dos directly in your workflow, you have a backlog of tasks, and then the organized sprints with a defined sprint length. The sprint length is a set period of time, usually 14 days, in which the selected tasks have to be implemented.

The main purpose of a sprint is to deliver a “done” increment. The meaning of ‘done’ may vary significantly for every scrum team. For software developers, it could be working code, for marketing teams – a usable lead nurture flow, for consultants – a specific business challenge solved.

Sprint Planning Explained

Running a successful sprint requires a bit of discipline and preparation. A sprint without a solid understanding of what has to be accomplished and how it will be measured isn't any different from ordinary ad-hoc processes. For that matter, to make sure that a sprint is well-plotted and productive in the end, sprint planning sessions are held.

Sprint planning is a collaborative meeting, or event if you like, where the team agrees upon work it'll be able to complete during the upcoming sprint.

The purpose of a sprint planning meeting is to identify the sprint goal and sprint backlog.

- ✓ Sprint Goal: This refers to a common destination the team should work to (e.g. ship data sync between System X and System Y).
- ✓ Sprint Backlog: The list of tasks to be completed during the sprint to achieve that goal.

During the sprint planning session, the team members will have to 'groom' the backlog and say which tasks they'll work on. However, for the team to be able to fulfil the goal, you'll need to have a healthy backlog.

According to Atlassian, a healthy backlog carries out three things:

- 1 Prioritizes each work item, with the most important work listed at the top.
- 2 Includes fully-formed user stories the development team can begin to execute on (more on this below!).
- 3 Contains an up-to-date estimate for each work item.



Pay attention:

To cover a two-week sprint, consider holding a two-hour sprint planning meeting. Ideally, the meeting should be held early in the week so as not to disrupt the team's flow by the weekend.

To hold a successful sprint planning meeting, you'll benefit from the presence of a Scrum Master, Product Owner, and the Team. More on their roles in the next section.

Roles Involved in Agile Sprint Planning

Generally, the key roles involved in agile sprint planning – the product owner, scrum master, and the team all need to attend, especially if it's part of the agile process in software development companies.

Jeff Bezos, the founder of Amazon, has implemented the famous two-pizza rule¹ for both meetings and teams, implying that each scrum team should have only as many people as two pizzas can feed over lunch.

Optimal scrum team size

To be more specific, the Scrum Guide suggests having three to nine members that will be executing the sprint backlog. The reason being more efficient operations as influenced by interpersonal relationships between teammates when teams are not too big. Vytas Butkus² from Toptal explained this phenomenon by comparing every person to a node that links up to other nodes to form a connection:

1 www.theguardian.com/technology/2018/apr/24/the-two-pizza-rule-and-the-secret-of-amazons-success

2 www.toptal.com/product-managers/agile/scrum-team-size

“Whatever the relationship is between two people, it is still a link that requires some mental capacity from each person. As a team grows, these numbers of these links do not grow linearly. If we take the 3 to 9 team members suggested by the Scrum Guide, we end up with between 3 and 36 links. If we grew to 15 people, we would have over 100 links.

A team of this could only operate efficiently if their duties were very well defined and rarely overlapped or if there were some unofficial sub-groups.”

Vytas Butkus, Toptal

Now that we’ve fleshed out the details around the optimal team size, let’s take a look at each agile role.

The Scrum Master: Facilitates the meeting

The Scrum Master's role in sprint planning is to make the meeting go as smooth as possible. They book meeting rooms, provide the supplies, align people who participate, make sure that connectivity is in place, and get rid of all potential distractions that could hinder the process. In simple words, they clear up the way for teams to focus on the most important things – the backlog and the planning and prioritization. They should also identify the length of the sprint and the best time to hold a sprint planning meeting.

The Product Owner: Clarifies the details of the product backlog

Product Owners translate the customer's needs to the team and maintain a healthy product backlog of items to work on before the sprint planning meeting begins. They are the ones who refine the details on each backlog item and answer related questions coming from the team. Product owners need to spend more time to prepare the sprint planning agenda than other participants, as their role is to prioritize.

The Team: Defines the work and effort

Teams also perform a critical role in the sprint planning session, as they actually get work done. They should be in full attendance for the meeting and put their heads together to contribute to the estimation and forecasting process as much as they can.




The Do's of Sprint Planning

So you know enough theory about sprints and your hands are itching to try it out to. Providing that you have the above roles in place, you're ready to run your first sprint, often called "sprint 0", as it's mainly dedicated to setting the stage and getting your infrastructure and processes in place.

Knowing the very basics, however, is not nearly enough to run a sprint. You'll need experience from seasoned professionals that have been cutting their teeth for years planning and executing sprints. So here are the do's and don'ts of sprint planning that you were so curious to know.

Do make sure everyone understands the timebox

Sprints vary in duration for a good reason: The length of the sprint depends on team velocity you have at this moment, and, to be honest, nobody knows what sprint length is optimal better than your team.



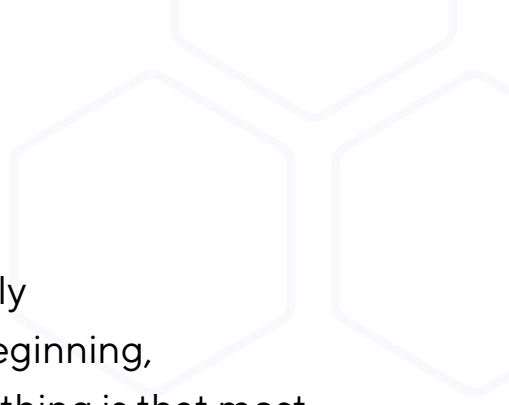
We recommend the following length for different types of teams, based on the processes they had been involved in before the change was introduced, but we also encourage you to communicate with the team to decide what's best for your situation.

- 1 1-week sprint: For teams that are used to fast-paced work and an agile environment and are able to produce product updates and new features in a week.
- 2 2-week sprint: An optimal speed for every team that wants to work in sprints and increase velocity.
- 3 3-week sprint: For teams that aren't used to fast-paced work, coming from an environment that was ad hoc and not structured.

Teams that worked in silos before and were not set for speed and efficient collaboration would prefer the longer sprint length to then shift to shorter sprints. That being said, here are a few general advantages and disadvantages of shorter and longer sprints.

Shorter sprints

One and two-week sprints open the window of opportunity to learn more with less time. The main advantage of shorter sprints is that they help the teams reveal problems faster. This way, the work is reviewed promptly and teams receive more feedback to improve on the results of their tasks. As the work is broken down into the smallest chunks possible, teams can prioritize more efficiently.



The main disadvantage of shorter sprints (especially 1-week) is that they might be too stressful in the beginning, requiring laser focus and concentration. The good thing is that most teams get used to it after 3-4 sprints.

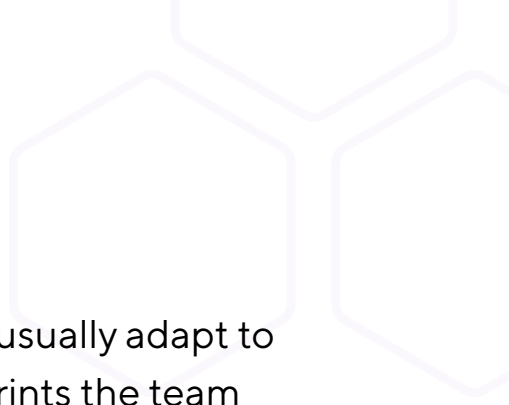
Longer sprints

The advantage of having sprints that last for three or four weeks is that one doesn't feel stressed starting out in Scrum. The disadvantages of longer sprints, though, manifest themselves in fewer opportunities to improve work processes and slower pace in general.

It always makes sense to experiment until you find the best duration for your context. If you do, you'll see the results and get feedback from your team immediately. It's a common practice to start with two-week sprints and move from there.

If you're satisfied with team velocity and everyone is close to reaching sprint goals, but the progress on the product is far from being meaningful, the sprint length you've chosen is probably too short. Try to lengthen the sprint and see what happens.

If the team finds it difficult to reach the sprint goals because saying other important things pop up all the time, then you may have chosen sprints that are too long. Shorten them up to one week and monitor the speed. Hopefully, you won't have to deal with two problems above, which means that your team can work productively in two- week sprints.



Pay attention to a 4 sprint rule relating that teams usually adapt to the new Scrum practice in four sprints. If after 4 sprints the team doesn't produce good results and feels unhappy, the chosen duration should be discontinued in favor of a shorter or longer sprint.

In general, adopting agile and working in sprints is like learning another language. Make sure everyone in the team speaks it fluently enough.

Do plan on achieving a releasable increment

The whole point of scrum is to have a potentially releasable, or shippable increment by the end of each sprint. Make it a destination, a measure of success, and a target for your team. Note that it doesn't mean that you should have a major cohesive release every sprint. The intent of sprints is for the team to have produced something good enough to be handed out to users.

The key question is, how can one tell what's 'good enough' to pass to the user? A potentially releasable increment can be measured by three factors: quality, effectiveness, and completion. Accordingly, shippable increments have very few defects, were properly tested, and are considered complete. Getting into the habit of releasing workable solutions to your client's problems will soon result in higher client satisfaction and team motivation.

Do run a backlog refinement meeting

Remember, the better prepared you are before the upcoming sprint, the more likely you are to meet your goal. Tim Snyder, Software Delivery & Agile Transformation Leader at USAA cautions teams against doing sprint planning around backlog items that have not yet been refined. Not doing backlog refinement prior to sprint planning and therefore needing to do it in sprint planning, according to the expert, is one of the mistakes product managers commit not knowing enough about the craft.

Preliminary planning is recommended to streamline the sprint planning meeting and prevent it from stretching for hours. Splitting the planning process into two parts, you make sure it's not overly long and everyone is engaged. It also gives you enough time to make all the necessary steps to get ready for the sprint, like reviewing the roadmap, grooming the backlog, and proposing the next sprint goal.

Experienced product managers prefer to do backlog refinement outside sprint planning. If you've decided to work in 2-week sprints, you can divide the planning process into two sessions. At the first one, spend an hour pre-planning. Sit with your team members to prepare a backlog, add new stories and epics, and also estimate the effort a day prior to the actual sprint planning meeting. According to Atlassian, it's best to run the next backlog refinement meeting in the middle of the sprint, as it allows the team to step back from the sprint and engage in the next steps a bit.

Do let people familiar with the work make estimates

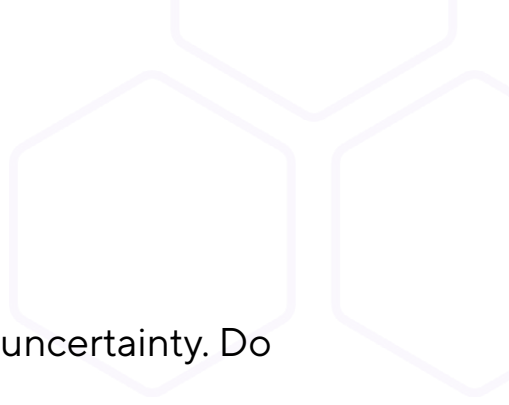
Try to prevent an estimate from being the final product of your personal guesswork. Estimates can easily become too ambitious when they are done solely by management and lead to over-servicing, project delays, or spiraling costs. To achieve an uplift of accuracy in estimations and get the task duration right, don't just handpick random individuals to figure out how long it will take to finish certain tasks. Engage your team in estimations – they are the subject matter experts to rely on. Note that for different people it will take a different amount of time to complete the same tasks.

Do explore using different estimation techniques

While story point estimation is a recommended go-to when working in sprints, there's no one-size-fits-all estimation technique. T-shirt sizing, story points, ideal days, or hours, could all potentially work depending on the situation. To speed up the estimation process, you could even start using an [AI-native platform](#) that would learn from your previous estimations and actual time and suggest the best task duration based on historical data.

Do book some time for your team in case they have questions

The more questions you leave unanswered, the longer it takes to achieve the target. Make time for the team to answer their questions.



Agile was invented to thrive in the environment of uncertainty. Do your best to respond to everyone's concerns.

Do learn from previous sprints

To set the scene for every next sprint, you should pluck out the learnings from the previous sprints to upgrade the operations inside the team and continuously improve the dynamics and results of your work. Do combine the lessons from the previous sprint review, customer feedback, or any results of your previous sprints. Your team is always in the trenches and on the front line, so any concerns and worries that come your way should be addressed and straightened out.

Just by looking at the problems you experienced, you can streamline your productivity and effectiveness next time. When Rosa Narváez¹, a creative art director who has jumped into the UX/UI world, recalls her first sprint in Google, she mentions one Google Sprint mantra – “fail fast.” It involves writing down a list of current and future problems, reframing those problems, and turning them into opportunities. **“In advertising, we have to look back. Otherwise, we send months of work into the trash. I couldn't believe how fast we were improving just by looking at our problems face to face,”** admits Rosa.

¹ <https://blog.prototypr.io/what-i-learnt-after-my-first-google-sprint-c6bb5e351fd6>

Do make sure everyone understands the goal of the sprint

Does the team leave the sprint planning meeting with a clear upfront understanding of the sprint goal? We can't stress enough how important it is that everyone can 1) describe the goal of the sprint and 2) interpret how they will start working toward that goal. Not only the sprint backlog can make it visible. Look for any signs of non-verbal communication that could reveal uncertainty. Sometimes they can tell a world of difference. Asking about any concerns will help you nail it down and further promote the culture of openness.

Sticking to the goal you'd like to achieve is a good way to start the sprint planning meeting. Explain the high-level objective of the sprint. This will help you prioritize between the backlog items as your next step. Marketing teams can focus on the exact numbers of leads and revenue, while development teams might benefit from working with user stories that describe work from the customer's point of view.

Before specifying the goal, always make sure that it follows the SMART framework, meaning it's Specific, Measurable, Achievable, Realistic, and Timely enough. A good sprint planning meeting provides an environment where the team is motivated and accomplishes the goals defined. In contrast, a bad meeting sets unrealistic expectations and prevents the team from performing well.

Do focus on the outcomes of the sprint

Tasks, priorities, dependencies, assignees, and estimations are essential, but they usually stand in the way of focusing on the outcomes during the sprint planning meeting. It's easy to get bogged down in the details of the 'project management' work ignoring high-level objectives and true customer wants. To keep them in mind when discussing the backlog items, user stories are recommended. They describe the work from a pure customer perspective and shift the focus from issues to outcomes.

Try filling in this pattern below:

**As <type of user>, I want <a goal> so that
<a reason>**

This line is popular for a reason. It prevents client expectations from being articulated in a vague, fuzzy way. You've probably noticed that filling in the answers, you immediately add a measurable result to the user story and achieve transparency needed to complete work.

Finally, let the team decide who wants to work on what, based on their experience and roles in the company. Don't forget to take into account vacations, holidays, or any other circumstances that can disrupt the flow. If the team members have already been assigned, make sure everyone knows if there are dependencies between the items.

Do capture the information in your collaboration tool

Sprint planning can entail a lot of administrative manual tasks, as many teams still use spreadsheets to track their work and thus increase the number of unnecessary data entry points. Trust us, this is not where you'd like to spend time. Having one centralized platform for collaboration company-wide will help you capture and update the information in a few clicks, at the same time keeping everyone on the same page and promoting visibility into crucial processes. Check out these [benefits of using project management software](#) and how it pays off.



The Don't's of Sprint Planning

Don't aim for the perfect plan

If there's one thing that everyone has learned during the years of planning, it's this – most of the time spent planning goes to waste because of the change requests that pop up during the project's lifecycle. Planning projects in shorter cycles like sprints can save the situation. However, one mistake that companies make way too often is planning every minute of the sprints and doing so too far in advance. This is not to say that you don't need a definite plan for success, you sure do. But avoid building a backlog for the whole project in advance, focus on the sprint goal and fill in a sprint backlog with tasks necessary to get started, at the same time ensuring there is enough work to pick up when they are finished earlier than expected.

Don't overestimate velocity

Don't pull in stories you can't finish during the sprint. If the team says that certain tasks require more time or can't be completed during the sprint, don't set yourself up for failure. Delivering more points during the sprint can be tempting, but it can put your team under pressure and eventually lead to estimation inflation.



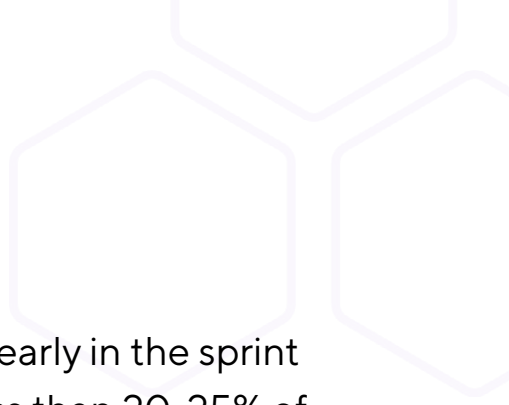
Don't equate story points to hours from day one

Translating story points into hours is a taboo in agile circles. Mainly because story points are not time units, they are estimates of effort, as influenced by the amount of work, complexity, risk, and uncertainty. The whole idea of having a set amount of hours for one story point wipes out the main benefit to story points in the first place and ignores who will do the work. **“A mile is a mile regardless of whether it will be run by a fast or a slow runner,”** admits Mike Cohn, a thought leader in the agile community.

However, this doesn't sound good for management, does it? To see at a glance how teams are performing and translate it into numbers and metrics, we need a less abstract approach. That's why companies practice translating story points into hours after a few sprints, when they have a clearer understanding of how much a story point could take.

Don't introduce last-minute changes

Too often, last-minute changes lacking specifications are squeezed into the sprint backlog. Ideally, the sprint scope is freezed after the sprint planning meeting and any change made to the sprint at a late stage is considered a new requirement.



The team can welcome small changes introduced early in the sprint to enhance agility only if the change estimate is less than 20-25% of sprint scope. If that's the case, consider taking out another story of similar size to deliver the change successfully.

It's not recommended, however, to get into the habit of introducing changes to the sprint on a regular basis, as they can disrupt the flow and result in a stressful environment.

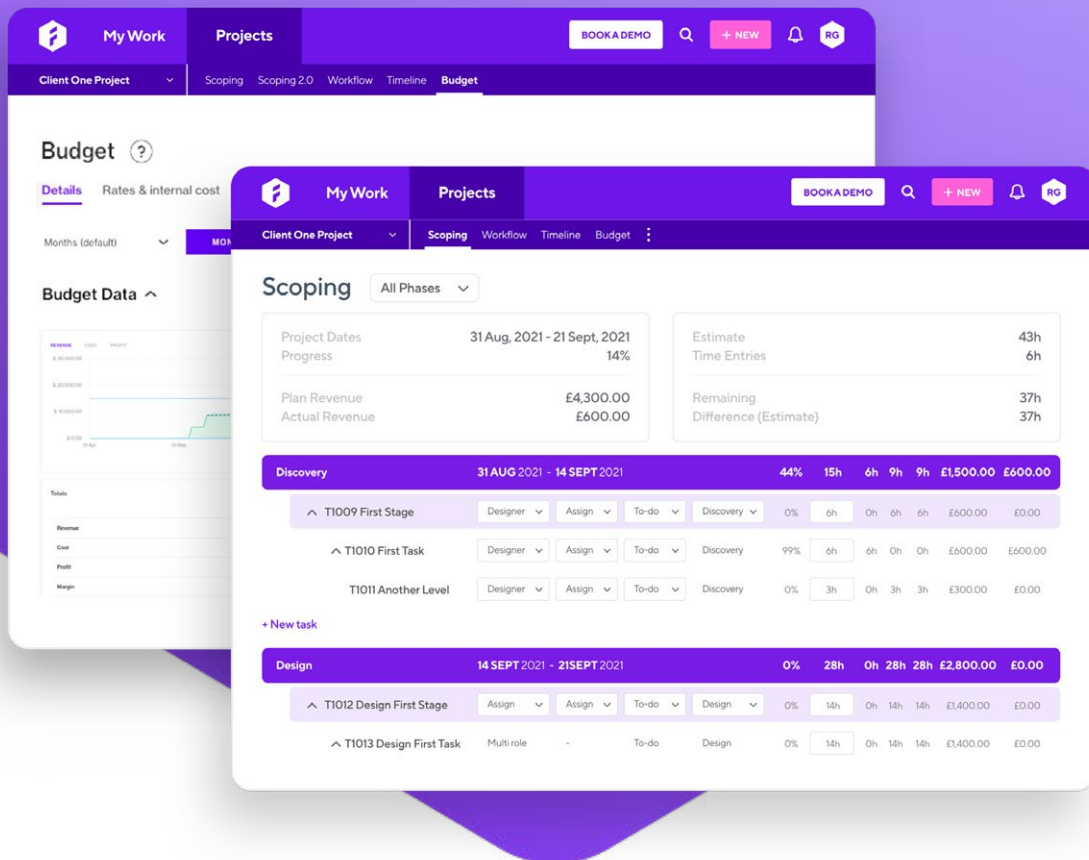
For that matter, if the business model calls on the team to remain open to frequent requirement changes (which is more than 25%), experts suggest considering Kanban for team collaboration in more dynamic business scenarios.

Conclusions

Scrum sprint planning is a craft, so everyone gets better at it with time and practice.

Agile encourages constant improvement, so don't be upset if your first sprint planning meetings didn't go as you expected.

You'll learn by doing and tailor the best way to work in sprints with your teams.



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