

STRATEGY

charter funding

RELEASE

vision

estimation

ITERATION

release  
plan

retrospective

DAILY

review

acceptance  
testing

CONTINUOUS

iteration  
plan

standup

build integration

TDD

# THE AGILE CHECKLIST

refactoring

collaboration



GET THE RHYTHM



# Introduction

Agile Development consists of a series of interdependent planning and delivery rhythms. These agile rhythms, while quite simple conceptually, have proven not so simple to implement. Yet this cyclical series of meetings and events delivers the reliable beat which allows teams to find their own agile rhythm.

While no single publication or presentation delivers all of the ammunition agile teams need to *get the rhythm*, this set of agile meeting and facilitation checklists offers an easy framework to help guide software development teams through the various agile cycles. We hope you find this step-by-step guide valuable.

Sincerely,

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# Introduction

# Agile Development Rhythms

## Strategy

Projects and product development efforts ideally start with a vision associated with a business need or direction. This vision is then typically framed in context of a strategy and associated goals and objectives during a management team planning session. The strategy is often accompanied by supporting materials such as a project charter and funding approval.

## Release

Releases represent the large-grained delivery cycle in agile development. Releases typically range between one and six months, but may extend longer in some environments. Releases begin with a release planning meeting where product owners (or product managers, project leads, etc.) work to define and prioritize a candidate set of features that are then estimated by the team.

## Iteration

Also known as Sprints, iterations are short, fixed-length subsets of releases, generally in the 1-6 week time frame. Iterations represent the execution heartbeat of the project. During, each iteration the team's goal is to deliver useful software. Iterations incorporate three key meetings: Iteration Planning, Iteration Review and Retrospective.

## Daily

Every day the team is focused on completing the highest priority features in the form of working, tested software. As features are delivered within the iteration, they are reviewed and accepted, if appropriate, by the product owner. Each day a short, 15-minute standup meeting facilitates the communication of individual detailed status and any impediments or issues.

## Continuous

Agile development teams are constantly driving towards a state of continuous, adaptive planning, collaboration, design, development, testing and integration. This commitment fosters a dynamic, highly productive environment in which automation is critical and the output is always high-quality, valuable working software.





# Meeting Checklists

# Release Planning

## Purpose:

The release planning meeting is an optional yet highly encouraged session where themes, functional priorities and delivery dates are initially defined. In this meeting the release backlog is identified and estimated at a high level. Based on an initial estimate and/or velocity, a preliminary delivery plan is agreed upon. This plan will be revised over time.

## Agenda:

- ✓ Review meeting agenda and guidelines
- ✓ Product Owner reviews product vision, strategy and goals
- ✓ Product Owner reviews key dates and milestones
- ✓ Product Owner presents the first cut at the prioritized product backlog
- ✓ Team asks questions to understand user stories
- ✓ Team estimates user stories at a high level (i.e. story points, ideal days, etc.)
- ✓ Team estimates its initial capacity and/or velocity per iteration
- ✓ Team finalizes its delivery objectives in the form of a release plan
- ✓ Meeting facilitator records any key decisions, assumptions, risks and/or issues
- ✓ Stakeholder consensus is achieved and a commitment to proceed is given

## Notes:

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## Attendees:

Product Owner, Product and/or Project Managers, Team Members, Key Stakeholders

## Inputs:

Vision and strategy, high-level goals and plans, prioritized product backlog, key milestone dates

## Outputs:

Release plan and backlog, key assumptions and issues, delivery dates

## Common Obstacles:

- Inability to negotiate time, scope and budget constraints
- Lack of acceptance of team-based estimation and planning
- Lack of understanding that the plan is not frozen and will change



# Meeting Checklists

## Iteration (Sprint) Planning

### Purpose:

The iteration planning meeting is for team members to plan and agree on the stories or backlog items they are confident they can complete during the iteration and identify the detailed tasks and tests for delivery and acceptance.

### Agenda:

- ✓ Review meeting agenda and guidelines
- ✓ Product Owner proposes the product backlog for review
- ✓ Product Owner and team review and clarify each item
- ✓ Larger stories are broken down as necessary
- ✓ Team estimates any resulting new stories
- ✓ Team selects the stories they can complete within the iteration
- ✓ Team ideally defines the iteration goal or theme
- ✓ Team breaks each story into tasks and clearly defined acceptance criteria
- ✓ Team estimates each task (typically in hours)
- ✓ Team members sign up for tasks initially or during the iteration
- ✓ Team may review the workload to make certain it is feasible and balanced
- ✓ Product Owner agrees with the work that will be completed

### Notes:

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### Attendees:

Product Owner,  
Team Members,  
ScrumMaster  
and/or Project  
Manager

### Inputs:

Prioritized product  
backlog, prior  
velocity, team  
member capacity  
and/or schedule risks

### Outputs:

Iteration goal,  
story tasks and  
acceptance tests,  
task estimates

### Key Considerations:

- The team always has the final say when it comes to estimating
- Every team member should have a vote and/or voice
- Dependencies should be minimized, if not prevented entirely
- The team should consistently identify any impediments preventing them from completing their work that need to be addressed

### Common Obstacles:

- Diving into too much detail and designing each feature in full rather than identifying the task work necessary



# Meeting Checklists Iteration (Sprint) Review

## Purpose:

An iteration review is conducted with the Product Owner to ensure all acceptance criteria of the work completed have been met. Following the review, the team then demonstrates completed functionality to showcase their work to interested stakeholders and/or customers.

## Agenda:

- ✓ Review meeting agenda and guidelines
- ✓ Team walks through completed functionality with Product Owner
- ✓ Team identifies any incomplete stories
- ✓ The Product Owner moves and/or splits incomplete stories or backlog items into next iteration or back onto product backlog if no longer a priority
- ✓ Product Owner closes out iteration and accepts appropriate functionality
- ✓ Team demonstrates working software to interested stakeholders
- ✓ Any open issues/impediments and action items are noted and assigned

## Notes:

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## Attendees:

Product Owner,  
Team,  
ScrumMaster  
and/or Project  
Managers,  
Stakeholders

## Inputs:

Working, tested  
software

## Outputs:

Final acceptance of completed  
functionality, resolution to any  
incomplete items, product backlog  
prepped

## Key Considerations:

- "Just say no" to PowerPoint slide decks or feature dissertations
- The Product Owner may decide not to accept certain functionality





# Getting Started Management Guidelines

As software development teams begin their agile transition, a smooth and consistent tempo can be established very early on via implementation of the following organizational and process considerations:

- Collaborate as a team (or organization) to research and select an agile framework and/or processes that align procedurally and culturally with your organization
- Ensure all teams have access to training and coaching to enable the successful adoption of agile development practices and processes
- Plan and communicate a rollout strategy that accounts for organizational structure, project and team hierarchies, roles and responsibilities and training and education plans
- Institutionalize your planning and delivery cycle (i.e. strategy, release, iteration, daily, continuously) for the organization
- Devise a set of internal guidelines and standards for teams to take advantage of such as:
  - Standard meeting guidelines
  - Planning and estimation standards and units
  - Team definition of "Done"
- Define the initial set of measures (velocity, burndown, cumulative flow, test status, etc.) for planning and tracking progress
- Agree generally on project and team roles and responsibilities
- Establish plans and goals for technical project execution such as:
  - Acceptance criteria strategy
  - Test coverage goals and automation plans
  - Integration and build practices
  - Coding and testing standards
  - Tools and technologies (coding, testing, build, deployment, project management, etc.)

# Getting Started Meeting Agenda

Meetings ideally follow a set of guidelines used to facilitate and keep the meeting both on topic and on time. Included is a list of items that may help in the preparation and moderation of your meetings.

## Pre-Meeting

- Establish a meeting purpose and goal
- Ensure all key participants are invited
- Publish the agenda at least 24 hours in advance
- Forward the meeting goal and agenda to each attendee
- Reserve and prepare all resources for the meeting (rooms, projectors, computers, meeting facilitation toolkit\*, etc.)

## Meeting & Post-Meeting

- Post meeting guidelines and rules
- Review meeting agendas and guidelines at the beginning of each session
- Conduct meeting
- Post meeting results and responsibilities in a visible location for all to see

*\*Note: A meeting facilitation toolkit often contains the following items:*

*flip chart, whiteboard markers, pens, index cards, sticky notes, planning poker cards, talking stick or toy to be held by the person speaking, timer or stopwatch, masking tape, bell or chime to alert when time is up on a topic.*

# Getting Started Meeting Schedule

## MEETING

## FREQUENCY

## LENGTH

### Strategy:

Typically once a year with periodic incremental updates

4 - 16 hours

### Release Planning:

1<sup>st</sup> day of each release

4 - 8 hours

### Iteration (Sprint) Planning:

1<sup>st</sup> day of each iteration

2 - 4 hours

### Iteration (Sprint) Review:

Last day of each iteration

1 - 2 hours

### Retrospective:

Last day of each iteration

1 - 2 hours

### Daily Standup:

Each day at the same place and time

15 minutes