

# Iteration Planning Guide

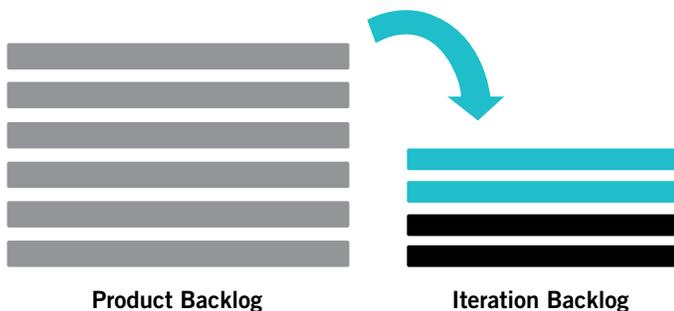
## What Is It?

The purpose of the iteration planning meeting is for the team to commit to the completion of a set of the highest ranked product backlog items. This commitment defines the iteration backlog and is based on the team's velocity or capacity and the length of the iteration timebox.

## Who Does It?

Iteration planning is a collaborative effort involving these roles:

- ScrumMaster - facilitates the meeting
- Product Owner - represents the detail of the product backlog items and their acceptance criteria
- Delivery Team/Agile Team - define the tasks and effort necessary to fulfill the commitment



## Before We Begin

Before getting started we need to ensure:

- The items in the product backlog have been sized by the team and assigned a relative story point value
- The product backlog is stack ranked to reflect the priorities of the Product Owner
- There is a general understanding of the acceptance criteria for these ranked backlog items

## Equal Opportunity Backlog

The product backlog addresses fixes to existing functionality and new functionality. The order in which a product backlog item is scheduled is completely independent of its ancestry.

We can further generalize and say that, for the purpose of iteration planning, the important attributes for a product backlog item are:

- It is small enough to be completed in the iteration
- We can verify it has been implemented correctly

## Right Sizing Backlog Items

Product backlog items too large to be completed in an iteration need to be split into smaller pieces. The best way to split product backlog items is by value not by process.

If we can split a product backlog item so that its children deliver value, then our iterations incrementally deliver value. If we split by process, then we impact time to market because value is not delivered until all the children are complete.

Compound stories can be easily split through disaggregation. Complex stories present a different challenge. Bill Wake enumerates twenty techniques at: <http://xp123.com/xplor/xp0512/index.shtml>

## Plan Based on Capacity

Mature teams may use velocity to determine what product backlog items to commit to during the iteration.

New teams may not know their velocity or it may not be stable enough to use as a basis for iteration planning. An approach for new teams is to make commitments based on the team's capacity.

## Determining Capacity

The capacity for the team is derived from three simple measures for each team member:

- Number of ideal hours in the work day
- Days in the iteration that the person will be available
- Percentage of time the person will dedicate to this team

## The Planning Steps

1. The Product Owner describes the highest ranked product backlog item
2. The team determines the tasks necessary to complete that product backlog item
3. Team members volunteer to own the tasks
4. Task owners estimate the ideal hours they need to finish their task
5. Planning continues while the team can commit to delivery without exceeding capacity

If any individual exceeds their capacity during iteration planning then the team collaborates to better distribute the load.

# ITERATION PLANNING AGENDA

<b>1. Opening</b> Welcome, review purpose, agenda, and organizing tools	ScrumMaster
<b>2. Product Vision and Roadmap</b> Remind the team of the larger picture	Product Owner
<b>3. Development status, state of our architecture, results of previous iterations</b> Discuss any new information that may impact the plan	Agile Team
<b>4. Iteration name and theme</b> Collaborative decision on name and theme	ScrumMaster
<b>5. Velocity in previous iteration(s)</b> Present the velocity to be used for this release	ScrumMaster
<b>6. Iteration timebox (dates, working days)</b> Determine the timebox and total working days (subtract days for holidays or other whole-team impacting events)	ScrumMaster
<b>7. Team capacity (availability)</b> Each team member calculates their capacity based on personal availability, allocation to this and other projects, productive time for tasks in this iteration each day	Agile Team
<b>8. Issues and concerns</b> Check in on any currently known issues and concerns and record as appropriate	ScrumMaster
<b>9. Review and update definition of Done</b> Review the definition of Done and make any appropriate updates based on technology, skill, or team makeup changes since the last iteration	Agile Team
<b>10. Stories/items from the product backlog to consider</b> Present proposed product backlog items to be considered for the iteration backlog	Product Owner
<b>11. Tasking out</b> Delivery Team determines tasks, signs up for work, and estimates tasks they own; Product Owner answers clarifying questions and elaborates acceptance criteria as appropriate; ScrumMaster facilitates collaboration <b>a.</b> Tasks, <b>b.</b> Estimates, <b>c.</b> Owners	Agile Team
<b>12. New issues and concerns</b> Check in on any new issues and concerns based on tasking out and record as appropriate	ScrumMaster
<b>13. Dependencies &amp; Assumptions</b> Check in on any dependencies or assumptions determined during planning and record as appropriate	ScrumMaster
<b>14. Commit!</b> ScrumMaster calls for a “fist of five” on the plan; Agile Team and Product Owner signal if this is the best plan they can make given what they know right now and commit to moving to the next level of planning (daily)	Agile Team
<b>15. Communication/Logistics plan</b> Review and update communication and logistics plan for this iteration	ScrumMaster
<b>16. Parking lot</b> Process Parking Lot – all items should either be determined resolved or turned into Action Items	ScrumMaster
<b>17. Action items/plan</b> Process Action Plan – distribute action items to owners	ScrumMaster
<b>18. Retrospect the Meeting</b> Because we want these meetings to be useful for everyone, we solicit feedback on the meeting itself	ScrumMaster
<b>Close – CELEBRATE!</b> Celebrate a successful planning meeting!	Agile Team