

Release Planning Guide

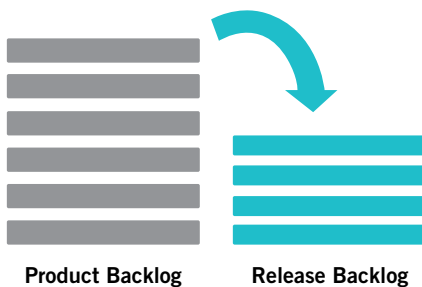
What Is It?

The purpose of release planning is to commit to a plan for delivering an increment of product value.

Who Does It?

Release planning is a collaborative effort involving these roles:

- ScrumMaster - facilitates the meeting
- Product Owner - represents a general view of the product backlog
- Delivery Team/Agile Team - provide insights into technical feasibility and dependencies
- Stakeholders - act as trusted advisors as decisions are made around the release plan



Before We Begin

Before getting started, release planning needs:

- A ranked product backlog managed by the Product Owner
- Input from the team about overall capabilities, known velocity and technical impacts
- High-level vision and market/business objectives
- An acknowledgment of whether new product backlog items may be needed

Materials Needed

- Posted purpose and agenda
- Organizing tools: working agreements, parking lot, communication/logistics plan, issues and concerns, dependencies and assumptions, decisions
- High touch: Flip chart or whiteboard and markers
- High tech: Projector, computer that can access needed data and tools, and a way for the computer to be shared
- Planning Data (see below)

Planning Data

- Results of previous iterations and releases
- Feedback from stakeholders on the product, market situation and deadlines
- Action plans/SMART goals from prior release and retrospective
- Items and defects to consider
- Development/architecture information
- Velocity from previous iterations or estimated
- Organizational and personal calendars
- Input from other teams/subject matter experts to manage dependencies

Output

- Release plan and commitment
- Issues/concerns/dependencies/assumptions to be monitored
- Any new items for the release backlog
- Suggestions to improve future planning meetings

RELEASE PLANNING CHECKLIST

1. Where's your Product Owner?

Make sure the person responsible for making priority decisions about big features is available, be it Analyst, Product Manager or Exec.

2. Do you have a ranked backlog?

5-15 high-level features, the Product Owner hopes to have in this release. Write each one on an index card.

3. How will you size your items?

Establish a common baseline for sizing. Consider bringing a broad group of individuals representing various teams together and have them size a dozen or so product backlog items.

4. Who's coming?

Everyone who is impacted by the release needs to be in this meeting to help develop the plan, identify dependencies, and commit to the release.

5. Plan for logistics

Write an agenda in advance. Consider room size. Review the agenda beforehand with ScrumMasters or team leads. Provision for breakout rooms, flipcharts and stickies, food and drink.

6. What about multiple or distributed teams?

Consider plane tickets if it's only 4 times per year. Or assign a scribe per distributed team to enter planning information from the whiteboard into your Agile project management tool. Use breakout rooms for each team if all on-site.

7. Do I need help?

This is an expensive meeting, and potentially a large one. If you haven't facilitated large group meetings before, especially when multiple teams are involved, consider bringing in an experienced facilitator to help.

RELEASE PLANNING AGENDA

1. Opening Welcome, review purpose and agenda, organizing tools, business sponsor's introduction. Along with a typical opening, it is helpful for the business sponsor to share a few words on the importance of this release and the team's upcoming work.	ScrumMaster
2. Product vision and roadmap Remind the team of the larger picture.	Product Owner
3. Development status, state of architecture, results of previous iterations in the prior release Discuss any new information that may impact the plan.	Agile Team
4. Release name and theme Inspect current status as it relates to your roadmap themes and collaboratively decide on adjustments to name and theme to achieve a specific, current business goal for the release.	ScrumMaster
5. Velocity in previous releases and iterations, or your estimated velocity Present the velocity (if available) to be used for this release.	ScrumMaster
6. Release schedule and number of iterations Review key milestones and special events followed by collaborative decision on timeboxes for the release and iterations within the release.	ScrumMaster
7. Issues and concerns Check in on any known issues and concerns and record as appropriate.	ScrumMaster
8. Review and update definition of Done Review the definition of Done and make any appropriate updates based on technology, skill, or changes in team makeup since the last release.	Agile Team
9. Stories/items from the backlog to consider Present proposed backlog items to be considered for scheduling into this release.	Product Owner
10. Determine sizing values Agree upon sizing values to be used in the release planning if velocity is unknown.	ScrumMaster
11. Coarse sizing of stories intended for the release Delivery team determines the size of items under consideration for the release and splits items too large for iterations in the release. Product Owner and subject matter experts answer clarifying questions and elaborate acceptance criteria and proper story splits. ScrumMaster facilitates collaboration.	Agile Team
12. Map stories to iterations in the release Delivery team and Product Owner move items to iterations based on size and velocity; ScrumMaster facilitates.	Agile Team
13. New issues and concerns Check in again on any new issues and concerns based on the previous work and record as appropriate.	ScrumMaster
14. Dependencies & assumptions Check in on any dependencies or assumptions determined during planning and record.	ScrumMaster
15. Commit! ScrumMaster calls for "fist of five" on the plan. Delivery 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 (iteration).	Agile Team
16. Communication and logistics plan Review and update communication and logistics plan for this release.	ScrumMaster
17. Parking lot Process parking lot - all items should either be resolved or turned into action items.	ScrumMaster
18. Action items/plan Process action plan - distribute action items to owners.	ScrumMaster
19. Retrospect the meeting Because we want these meetings to be useful for everyone, we solicit feedback on the meeting itself.	ScrumMaster
Close – CELEBRATE! Celebrate a successful planning session!	Agile Team