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).

We would love to hear your feedback, suggestions and how this has helped you so please contact us at info@agiletransformation.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 and Sponsor to provide a clear overview of the vision, objectives, deliverables, desired roadmap and perform initial team forming activities.

**Attendees:** Product Owner, ScrumMaster, The Team (All roles needed to get a story ‘Done’ including business SMEs)  
Should Have: Sponsor, Key Stakeholders

**Duration:** This Initial meeting can take 4 hours

**Deliverables:**
- Product Vision Box
- Measures of Success (release level acceptance criteria ‘Done’)
- Visioning Artifacts (such as: High Level Process Diagram, Use Case Diagram, UI Flow, Personas)
- Desired Product Roadmap (what do we hope to deliver by when? High level as this will change)
- Project/Release Risks and Constraints
- Team Roles and Expectations
- Consensus on Team Norms (working agreements)
- Consensus on Agile 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
### Building the Backlog - 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 *(All roles needed to get a story ‘Done’ including business SMEs)*

- Should Have: Key Stakeholders *(Remember to invite departments who help setup the foundation for your team during the Foundation/Non-Functional story writing portion)*
- Could Have: Sponsor

**Duration:** This meeting can take 4 hours – several days depending on release size

**Deliverables:**
- Prioritized Product Backlog *(Themes, Features, Stories)*
- Foundational, Spikes and Change Management Stories*
- Storymap *
- Updated Roadmap

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**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**

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**Sample Agenda:**

- **Meeting Purpose and Norms**
- **Review Story Writing Guidelines**
- **PO Presents their Initial Story Backlog** *
- **Team and PO writes functional stories** *(By Persona, Story Map, Brainstorming)*
- **Identify Risk/Spike Stories**
- **Identify Foundational/Non-Functional Stories, Change Mgmt**
- **Breakdown EPICs (in this release)**
- **Prioritize/Rank Order the Backlog** *(Dependency, Risk, MoSCoW, H-M-L, Kano)*
- **Update Release Roadmap (R1, R2, R3...)**
- **Consensus, Action Items and Closing**
# Release Planning & Estimating Meeting

**Meeting Purpose:** For the PO and the team to collaborate on building an initial guiding plan (number of iterations, estimated velocity, release themes, dates) that provides an initial release plan and foundation for how the team will deliver on the vision.

**Attendees:** Product Owner, ScrumMaster, The Team *(All roles needed to get a story ‘Done’ including business SMEs)*  
Should Have: Key Stakeholders and SMEs  
Could Have: Sponsor, Managers

**Duration:** This meeting can take 4 hours – 1 day+ depending on release size

**Deliverables:**
- Initial Release Plan *(knowing it will change)*
- Estimated Team Velocity
- Target Release Dates
- Estimated Release During *(Iterations) and or Points Delivered*
- 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 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

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### Iteration 0 Planning Meeting

**Meeting Purpose:** For the Team and other supporting (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: PO
Should Have: Infrastructure, Security, DBAs ..etc

**Duration:** This meeting can take 1 – 2 hrs

**Deliverables:**
- □ Iteration 0 Stories in Ranked Order
- □ Task List for Iteration 0
- □ Team Consensus on Iteration Plan

### 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 Capacity Planning
- □ 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

<table>
<thead>
<tr>
<th>Meeting Purpose:</th>
<th>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.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attendees:</td>
<td>Product Owner, Business Analyst, Tech Lead, Tester Could Have: ScrumMaster, SMEs, Sponsor*</td>
</tr>
<tr>
<td>Duration:</td>
<td>Plan for about 2 - 3 hrs/week (depends on complexity of stories)</td>
</tr>
</tbody>
</table>
| Deliverables:    | □ Confirmation of stories for the next iteration  
 □ Detailed requirements (acceptance tests, UI Mockup*, Process/Activity Diagram*, Behavior Driven Development tests*, Sample Test Data*)  
 □ Technical risk mitigation action items |

* Optional

### 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 agreeing on target stories, confirming acceptance criteria, breaking down the work into tasks and confirming capacity and target completion goals.

**Attendees:** Product Owner, ScrumMaster, The Team (All roles needed to get a story ‘Done’ including business SMEs)
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! Start with 4 hrs then scale down when feasible)

**Deliverables:**
- Prioritized Stories for this Iteration
- Acceptance Criteria for Each Story
- Story Elaboration Artifacts
- Story Tasks
- Sprint Goal/Theme (what goal/objective are we trying to accomplish?)

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### 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

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**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**
## Daily Standup Meeting

<table>
<thead>
<tr>
<th>Meeting Purpose:</th>
<th>For the Team to communicate with each other daily on progress, impediments, dependencies and foster a culture of shared responsibility and visibility. <em>This is not a status report meeting to the ScrumMaster or Mgmt!</em></th>
</tr>
</thead>
<tbody>
<tr>
<td>Attendees:</td>
<td>Product Owner, ScrumMaster, The Team Should Have: Shared members from other areas who have active tasks Could Have: Sponsor, Managers, Stakeholders <em>(but they can’t speak, only observe)</em></td>
</tr>
<tr>
<td>Duration:</td>
<td>15 Min. Anything longer is a sign of dysfunction</td>
</tr>
</tbody>
</table>
| Deliverables:    |  □ Everyone has a chance to share their progress  
|                  |  □ Impediments list updated and owner identified  
|                  |  □ 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 and release plan 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 2+ hours per week (depends on complexity and volatility of backlog)
(The story elaboration/pre-planning meeting described earlier is sometimes also referred to as Grooming)

**Deliverables:**
- Updated Backlog
- Updated Release Plan *
- Updated Roadmap *
- Emerging Risks and Mitigation Strategy*

* Optional

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**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

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**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:**

<table>
<thead>
<tr>
<th>Part 1 (the Review):</th>
<th>For the PO to review all the stories and confirm acceptance criteria have been met. PO accepts or rejects the story as ‘Done’ (typically performed one day before the demo)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Part 2 (the Demo):</td>
<td>For the PO and team to showcase to the Sponsor and other Stakeholders what they have completed in this iteration, solicit their feedback and celebrate success.</td>
</tr>
</tbody>
</table>

**Attendees:**

- Product Owner, ScrumMaster, The Team
- Demo Should Have: Sponsor, Stakeholders, Managers
- Demo Could Have: Anyone interested in seeing the team’s progress

**Duration:**

- The Sprint Review could take 1 – 2 hrs
- The Demo could take 1 hr with 30 - 40 min prep

**Deliverables:**

- Sprint Review:
  - ☐ PO accepts or rejects stories
- Demo:
  - ☐ PO and team showcase completed functionality
  - ☐ Input/feedback from sponsor and stakeholders

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### 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

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### 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 dig deep into their processes, team dynamics and deliverables so they can celebrate success and identify improvements. A retrospective must result in concrete action items for the next iteration.

### 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:
- Update on action items from previous retrospective
- Current list of Working Well items
- Current list of Needs Improvement
- Action items for top improvements selected for next iteration
- Output from Retrospective Exercises
  (Examples: team radar, force field analysis, anonymous Top 5, appreciation game, mad sad glad, happiness meter)
  
  *Read: Agile Retrospectives – Making Good Teams Great*

### 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!
**TeamHealth Retrospective Assessment Meeting**

**Meeting Purpose:** For the Team to have a deep-dive strategic retrospective that focuses on the top areas that affect team performance/health and develop an actionable growth plan.

**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 2.5 – 3 hrs, repeat once a quarter

**Deliverables:**
- Completion of the 360 TeamHealth Radar assessment
- Analysis of the results & variance between responses
- Review the Team’s strengths *(Celebrate success!)*
- Review the Team’s improvements and opportunities
- Target Just In Time coaching on top gaps for the Team
- Team Growth Plan with actionable deliverables for the next quarter
- Optional: Follow up recommendations on custom training, coaching, AgileVideos and resources to address Team’s target growth areas

**Sample Agenda:**
- Meeting Purpose & Norms
- Review progress on previous growth items
- Introduce the 5 TeamHealth Dimensions
- Take Assessment as a Team *(use flashcards)*
- 10 Min Break *(Review Results)*
- Analyze and discuss radar results
- Review Strengths
- Review Improvements
- Review Top Impediments to growth
- Build the Team’s Growth Plan
- Add ‘Organizational’ growth items
- Meeting Retrospective and Closure

**Facilitation Tips**
- Input: Growth items from previous retrospective
- Prepare the team for a healthy open retrospective through team norms
- Dig deeper into team dynamics and org growth areas
- Celebrate success, try the appreciation game
- Keep growth plan to a manageable and actionable list
- Protect any private textual responses/comments
- MUST follow through with improvements through iteration retrospectives!