

Quarterly planning checklist for:

You! The Quarterly Agile Planner

BEFORE

- Confirm cadence** - Provide the schedule for the upcoming quarter and sprint dates
- Coach** - Ensure scrum masters are ready, leaders know the purpose / outcome, team members understand the planning process
- Schedule events** - ensure the right calendar invites have gone to the right people
- Agree measures** - work with Product manager, Tech Lead, stakeholders and Scrum Masters to agree how to measure success
- Manage expectations** - Ensure everyone understands the outcome is an intention rather than a promise, and that predictability is variable, (don't load up all sprints!).
- Seek support** - from an agile coach or a co-facilitator to help organise & run the event
- Cater for people** (not just process) - ensure regular breaks & time zones are considered. Are there activities to connect people on a human level & to have fun during the event?
- Rehearse** - organise a presentations dry run prior. Do this collectively to ensure consistent messaging and avoid surprises.
- Seek a balance** - planning should not only consider business demand, but any technical demand, release activities, product support that will absorb capacity during the PI

DURING

- Open the event** - As the central organiser for the planning event everyone is looking to you to guide the event and provide clear guidance on what needs to happen, and when. Starting with the opening on day 1.
- Facilitate Scrum of Scrums** - Bring the Scrum Master's together at regular intervals to coach the planning process and encourage visibility of progress, blockers, risks and dependencies.
- Unblock** - As you become aware of any challenges emerging for the teams help to resolve these as quickly as possible during the event by co-coordinating discussions or bringing it the right people to the right conversation
- Float** - ensure everyone knows how to contact you at any point during the event. Pop into the team discussions and check in with stakeholders regularly.
- Protect the teams** - ensure they are not being asked to over commit (or doing that to themselves) or plan unrefined work that isn't 'Ready'
- Close the event** - facilitate the plan reviews, and encourage discussion and feedback from stakeholders

AFTER

- Consult** - ensure regular communication is happening, and that you're aligned on current and future aspirations
- Facilitate Scrum of Scrums** - Bring the Scrum Master's together at regular intervals to coach the quarterly agile planning process and encourage visibility of progress, blockers, risks and dependencies.
- Attend sprint reviews** - to understand progress, encourage interaction with stakeholders and understand what may need to be included in the end of quarter system review
- Focus on continuous improvement** - identify trends, gather empirical data and work with the train towards improving predictability, quality and enjoyment
- Measure progress** - at any point during the qtr you should be able to provide information based on the objectives and associated business value achieved to date

