



# Quarterly planning checklist for: Scrum Master / Team Coach

## BEFORE

- Capacity** - Know team members availability for each sprint considering national holidays, scheduled vacations, planned leavers / joiners
- Velocity** - Know the average amount of work that the team completes each sprint
- Events** - checked for any release dates, maintenance work, marketing activity happening within the PI
- Collaboration** - work with PO to understand the business priorities for the qtr. Help the PO understand any technical enabler work required within the qtr
- DoR / DoD** - Document and ensure everyone has visibility of your definition of ready (work is at a suitable level of granularity to plan into a sprint), and definition of done (what triggers work to be classified as completed)
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Download at [noelwarnell.uk/QAP](http://noelwarnell.uk/QAP)

## DURING

- Guide the team re appropriate level of detail** - first 2 sprints should be planned with stories up to 80% of available capacity. Sprint 3-5 with features you intend to start.
- Identify dependencies** - record anything you need from anyone external to the team to complete work during the qtr. Raise these during Scrum of Scrum meetings and try to agree them during the planning event
- Identify Risks** - record anything that could negatively impact the teams ability to complete the objectives. ROAM format.
- Collaboration** - work with the PO to articulate the objectives for the team, for the qtr.
- Visibility** - Ensure the teams plan, dependencies and risk are available to everybody throughout the planning process
- Attend Scrum of Scrums** - Represent the team in regular meetings with other Scrum masters. Escalate blockers, seek advice and help needed
- Facilitate confidence vote** - at regular intervals ask the team - "Are we confident with this plan?". Towards the end of the planning take a score from each team member from 1 (lowest) to 5 (highest confidence)
- Present** - back the high level plan at the end of the planning event (with PO and Team)

## AFTER

- Protect the team** - by providing ongoing transparency of progress, blockers, dependencies to stakeholders and honouring the DoR / DoD
- Attend Scrum of Scrums** - Represent the team in regular meetings with other Scrum masters for the train. Escalating blockers and seeking advice and help as appropriate.
- Maintain the sprint cadence** - schedule the sprint events (Planning / Daily Scrum / Review / Retrospective) and ensure invites are available to relevant participants. These events are not optional.
- Focus on continuous improvement** - identify trends, gather empirical data and work with the team towards improving predictability, quality and enjoyment
- Measure progress** - at any point during the quarter you should be able to provide information based on the objectives and associated business value achieved to date for the team

