MEETING CHEATSHEET

SCRUM MASTER CHECKLIST

MEETING	GOALS	AGENDA	INPUTS	OUTCOMES
Backlog Refinement (aka. Grooming, Prioritization)	Ready the Product Backlog for future Sprint Plannings by adding details and estimates to highest priority items.	1. Prioritize backlog, highlighting changes since last time 2. Split or group backlog items 3. Refine backlog items with input from SMEs 4. Define acceptance criteria, estimate effort, note dependencies & assumptions	• Product backlog • Feedback from last review meeting • Expertise from across the delivery team	1. Prioritized backlog with well-defined items at the top 2. Team members have shared understanding of upcoming work
Planning (aka Replenishment)	Align team and stakeholders on work to be completed in upcoming delivery cycle	1. Identify next Delivery Goal (what's the overall objective of the next increment of work?) 2. Determine team capacity to take in new work 3. Select work items in support of the delivery goal 4. Break work items into tasks (optional) 5. Include continuous improvement activities in work plan	• Product backlog • Feedback from last review meeting/velocity • Team capacity • Improvement ideas/actions from retrospectives	1. Delivery goal for next increment 2. Work items the team will deliver in the current delivery cycle
Daily Standup (aka Daily Scrum, Daily Huddle)	Review progress against delivery goals and coordinate work in progress. Identify and escalate impediments	1. Update state of work items 2. For each item in progress ask "What do we need to complete this piece of work?" 3. Is anyone working on something that's not on the board? 4. Can we spot any impediments or bottlenecks to the flow of work?	• Team taskboard	1. Team cocreates daily workplan 2. Taskboard displays current state of work 3. Impediments are flagged, being worked
Review (aka Demo)	Evaluate work delivered against work planned in this cycle. Demonstrate completed work	1. Review work completed against work originally planned & the Delivery Goal – highlight changes and learnings 2. Demonstrate finished work 3. Capture new ideas for the backlog, based on finished work & input from all stakeholders	• Original plan from Planning meeting • Completed work	1. Team/stakeholders understand what's been delivered 2. Team learnings re: planning 3. Stakeholders provide feedback on completed work to intent owners
Retrospective	Team inspects team dynamics and work process to identify continuous improvement activities	1. Review results of last retro-generated improvement 2. Gather data from team members about last delivery cycle experience and generate insights 3. Decide what to do as next improvement activity and use PDCA to design action	• Action from last retro	1. New (or continuation of current) improvement activity to be included in team's work plan
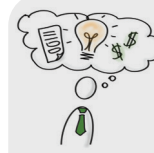
ARE YOU COACHING THE PRODUCT OWNER TO:

- Prioritize the product backlog? ☐
- Identify all users' needs in product backlog? ☐
- Use the INVEST criteria to write better user stories with the team? ☐
- Identify acceptance criteria for user stories? ☐
- Decompose large stories into the smallest increments of value? ☐
- Use big visible information radiators to share product information? ☐
- Adjust the delivery plan based on actuals? ☐
- Understand risks associated with incurring technical debt? ☐
- Be in constant communication with the team and stakeholders about the work? ☐
- Use the product backlog to manage stakeholder expectations? ☐
- Assess product impact against anticipated business value? ☐
- Develop a range of tools for understanding customer needs (eg. Story mapping, impact mapping, prioritization techniques)? ☐

ARE YOU COACHING THE DELIVERY TEAM TO:

- Have clear and measurable goals? ☐
- Collaboratively create delivery plans? ☐
- Focus on work within the Sprint? ☐
- Give and receive feedback? ☐
- Make participatory decisions as a team? ☐
- Establish and hold themselves accountable to a team working agreement? ☐
- Be transparent about impediments? ☐
- Honour commitments it makes? ☐
- Create a safe and healthy working environment? ☐
- Have challenging conversations? ☐
- Communicate frequently with the PO? ☐
- Be responsible for creating the Sprint backlog? ☐
- Improve their development practices? ☐
- Foster a sense of accomplishment? ☐
- Speak freely during retrospectives? ☐
- Step out of their comfort zone? ☐
- Broaden their product delivery skillset? ☐
- Reduce technical debt? ☐

ARE YOU COACHING YOUR ORGANIZATION TO:

- Surface and address organizational impediments? ☐
- Establish communities of practice? ☐
- Facilitate coordination between teams when needed? ☐
- Align performance evaluations with team objectives? ☐
- Work with change intentionally? ☐
- Become a learning organization? ☐
- Recognize the benefits of increased agility? ☐
- Become known as a great place to work? ☐

Agile Partnership offers coaching, training, and facilitation services for the whole organization. We will work with you to create organizational change that will foster an exceptional working environment. Together we'll focus on enhancing team creativity, productivity, and effectiveness. As a result, your teams will deliver with confidence, delight your customers, and improve your business outcomes.

Visit **www.agilepartnership.com** for more ideas, or email us at **go@agilepartnership.com** to start the conversation about how we can help you excel!

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LIFTOFF CHECKLIST

(Important caveat: the team doesn't need to have a full and complete understanding of every aspect of each of these items to check it off the list – the heuristic here is Good Enough For Now)
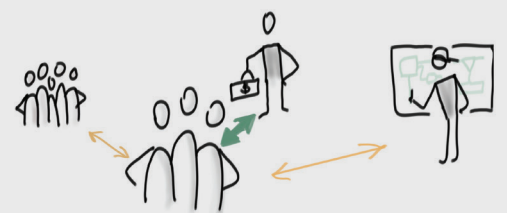
PURPOSE – "WHY ARE WE HERE?"

- [ ] 1. The team has a shared understanding of its vision.
- [ ] 2. All team members understand the key business outcomes desired to realize the team's vision, and the indicators they will look to in order to determine whether they are succeeding at realizing those outcomes.
- [ ] 3. Team members know who their customers and partners/stakeholders are and understand their hopes for the project.
- [ ] 4. The team has an initial backlog of valuable work items that will help the team realize the business outcomes.
- [ ] 5. Team members have a sense of how the business value of work items is defined and where tradeoffs might be considered in meeting customer expectations.

ALIGNMENT – "WHO ARE WE AND HOW WILL WE WORK TOGETHER?"

- [ ] 1. Team members know who is a core member of the team, and who are external contributors who they need to work with to help them deliver.
- [ ] 2. The team has articulated its shared values.
- [ ] 3. Team members have identified simple guiding principles to help them be successful together.
- [ ] 4. The team has a working agreement outlining specific behaviours they want to support each other in so that they can work effectively together.
- [ ] 5. The team has identified the capabilities it possesses and the capabilities it needs to develop in order to deliver reliably and with quality, and to minimize bottlenecks/single-points-of-failure.
- [ ] 6. The team has established a schedule for planning/dailies/reviews/retros, where their information radiators will go, where/how information will be shared online, etc.

CONTEXT – "WHAT'S THE BIGGER PICTURE? HOW DO WE UNDERSTAND THE SYSTEM AND ITS INFLUENCES?"

- [ ] 1. The team knows who its stakeholders/partners are, and what information/decisions/resources they need from each other.
- [ ] 2. The team understands what decisions about the work have already been made and other constraints that will determine what/how they deliver.
- [ ] 3. The team has considered the risks and opportunities inherent in their upcoming work, and is actively considering how to mitigate risks and take advantage of opportunities for greater benefit.
- [ ] 4. The team knows what resources are needed to deliver, and is working to get the resources it doesn't currently have in a timely fashion.
- [ ] 5. The team has established the initial practices it will use for coordinating, collaborating, and communicating its progress.

AS A SCRUMMASTER OR COACH WITH A NEW TEAM, YOU MIGHT ALSO

1. Meet one-on-one with team members to better understand their needs and interests

2. Meet with the team's stakeholders and/or Scrum Masters/representatives from other teams where there are dependencies to establish relationships and feedback loops

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WHY COLLECTING DATA IS IMPORTANT

The first step to solving a problem is being aware of it. Metrics will help to understand the past and predict the future. And more importantly, "If you can't measure it, you can't improve it." (Peter Drucker)

WHAT TO MEASURE?

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BE CAREFUL COLLECTING METRICS:

- People lose interest and will game the system when they don't believe in the underlying goal of the information being collected or don't trust how it will be used.
- You will get what you measure. Be careful not to encourage undesired behaviours by measuring the wrong things.

HOW TO FIND METRICS THAT ARE APPROPRIATE:
1. What is your goal?
2. What are the questions you want answers to?
3. What data can be collected to help you answer these questions?
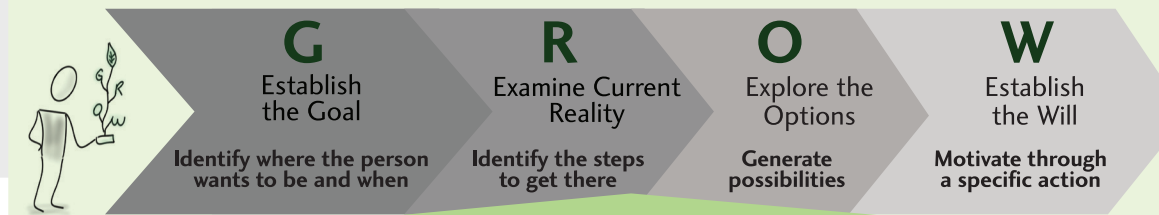
EXAMPLES AT THE TEAM LEVEL

Quantitative metrics

- Business value produced per sprint (eg. savings in time/money, increased revenue, number of users, market share)
- Business objectives realized (outcomes)
- Number of bugs found in production
- Number of bugs found by the end users
- Number of stories delivered each sprint
- Time needed to get to deployment in (QA/UAT/Prod)
- Time needed for manual regression testing
- Cycle time, Lead time
- SLA / SLE (Service Level Agreement/ Service Level Expectation)
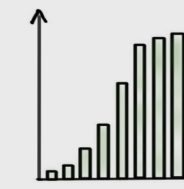
Qualitative observations

- Team member's level of happiness
- Client's level of satisfaction (eg. Net Promoter Score)
- Process objectives are realized (eg. events are happening as agreed and are achieving expected outcomes, process artifacts are being used and kept current)
- Alignment with Agile values, principles and practices
- Environment is encouraging innovation
- Team health check

COACHING TOOLS - THE GROW MODEL

G	**R**	**O**	**W**
Establish the Goal	Examine Current Reality	Explore the Options	Establish the Will
Identify where the person wants to be and when	Identify the steps to get there	Generate possibilities	Motivate through a specific action

Powerful Questions	**Feedback**	**Request**
• Are truly open • Are not asked with a "correct" answer in mind • Invite introspection • Reveal additional solutions • Send people into a realm of discovery	**HOW :** • Starts with respect • Stick to facts • Avoid Always & Nevers • Be brief • Used "I" • Keep listening **AVOID :** • Interpretations • Accusations • Judgements • Subjectivity	**WHEN :** • Something is missing • Improve a solution • Solve a problem • Make a breakthrough **HOW :** • Be direct • Stay flexible • Strengthen cooperation • Clear reason • Specific action • S.M.A.R.T. • Keep listening

ACTIVE LISTENING
Be patient | Use silences
Summarize | Be attentive | Be objective | Show empathy