Scrum Checklist 2009

Your Scrum Checklist

The Hard Facts:
Roles. Artefacts. All Meetings.

*bor!s***gloger** Wien. New York. Recife. Baden-Baden.

Scrum

Scrum is a framework with simple rules.
Scrum Checklists will help you to remember these simple rules in the heat of daily work and stress. Scrum Checklists enable you to create an enjoyable and productive work environment with your Scrum-Team.

For *Scrum Beginners* - Follow the Scrum Checklists by the book. It will enable you to run you first 3 to 4 Sprints very successfully. Your success will facilitate to spread Scrum in your organization.

For *Scrum Intermediates* - Use your common sense to tweak your processes guided by these Scrum Checklists.

As an *experienced ScrumMaster* - Use Scrum Checklists as your safety belt in stressfull situations.

Scrum Checklists do not replace experience and practice.
Scrum Checklists are not procedures that you have to follow.
Scrum Checklists help to run a successful Scrum in a demanding environment.

Keep alive *10 Basic Practices:*

1. A clear and catching Vision
2. A maintained Product Backlog
3. A sorted Product Backlog based on business value.
4. Backlog Items are sized by the Team.
5. Daily Scrums
6. Burn Down Charts
7. The Sprint is not disturbed by management and/or customers.
8. The software the Team delivers is "done".
9. A collaborative Sprint Review
10. Sprint Retrospectives with focus on improvement in the work process of the Team and the organization.

General Meeting Rules

Basics:
Every meeting starts on time and ends on time.
Every meeting is an open meeting. Everyone can attend.
Every meeting is time-boxed. This is a hard rule!

Preparation:
1. Invite everybody who is necessary ahead of time so that they may prepare.
2. Send out an agenda with goal and purpose of the meeting.
3. Book all resources for the meeting:
   room, data projector, flipcharts, facilitation equipment and anything else you will need for your meeting
4. Send a reminder 24 hrs before the meeting.
5. Prepare a flipchart with meeting rules.

Facilitation of the Meeting:
1. The facilitator has to be present during the discussion. He is not allowed to be involved in the discussion but he needs to follow and bring the discussion back to the topic in case the participants loose focus.
2. He presents the meeting goal and agenda.
3. He agrees on a person who will write the meeting minutes if necessary.
4. He will be the scribe for the Team or teach them how to do the documentation themselves and might record what is said on a flipchart to visualize the conversation.
5. He keeps the focus of the meeting. By using tools like the Parking Lot to capture issues or questions that aren't related to the meeting's purpose so that they may be addressed later.
6. He ends the meeting with a wrap–up and a very short retrospective (5 minutes only).

Output:
• Documentation by having the scribbles or flipchart notes. Take some photographs of your boards and flipcharts.
• Meeting minutes and a clear understanding of the meeting result must be communicated.

Estimation Meeting

Purpose:
1. For strategic planning you need to know the size of the Backlog Items. It is a necessary input for release planning and for gaining an understanding of how much a Team might be able to develop in a Sprint.
2. It enables the team members to see, what will happen in the following phases of the project.
3. Grooming Backlog Items: Get better understanding for Backlog Items by decomposing them if appropriate.

Basics:
Only the Team estimates. A Product Owner needs to be present to help to decide when a story can be broken into smaller stories.

Ingredients:

• The Product Backlog that is prioritized according to business value by the Product Owner.

• Planning Poker Cards

Colored icon = mandatory participant
Grey icon = optional participant

! Don'ts
1. Do not size effort - only the Team does!
2. The Product Owner does not size.
3. Do not do this activity as part of the Sprint Planning Meeting #1.

Procedure:
1. The Product Owner presents the Product Backlog Items she wants to have estimated.
2. The Team plays Planning Poker for those Backlog Items.
3. In case the Backlog Item is large but needs to go into the next or subsequent Sprints, the Team will split the Backlog Item into smaller Backlog Items. Re-size the new Backlog Item by playing Planning Poker for it again.
4. Re-size Backlog Items that are not done but likely to be a request for the next three Sprints.
5. Identify Backlog Items that need to be clarified for the next Estimation Meeting.

Duration:
Time-box this meeting to 90 min or less.
A desirable frequency of Estimation Meetings, if the Sprint is longer than a week, is two meetings per Sprint.

90 min

Output:
• Estimated Product Backlog
• Smaller Backlog Items
• Issues that need to be clarified

Insider Tip:
Try also business value estimation meetings for Product Owner(s) on a weekly basis.

Scrum Flow
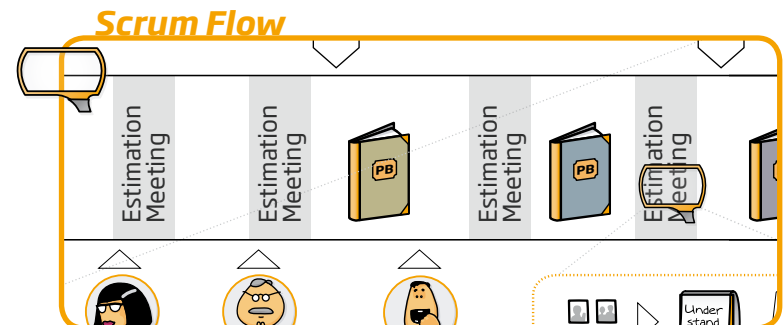
Sprint Planning Meeting - Part 1

Purpose:
Metaphor for this meeting: Analysis. The goal of this meeting is to understand in detail what the End User wants. This meeting will enable the product development team to get a clear picture of what is needed by the End User. At the end of this meeting the Team will be able to decide what they are able to deliver.

Basics:
Only the team members decide how much they can take on for the Sprint!

Ingredients:
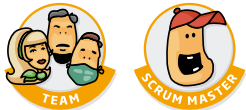
- Estimated and sorted Product Backlog
- Flipcharts, markers, scissors, glue, sticky notes, whiteboards, pencils, crayons
- Vacation planner, contact details of important persons

InsiderTip for the Product Owner: Create a sense of urgency by asking the Team for synchronization of their wristwatches or by telling everybody where the emergency exists are.

Duration/Location:
60 min per week of the Sprint. Run this meeting in the morning - to be able to have the Sprint Planning Meeting #2 on the same day.

60 min/ SprintW

Output:
- Selected Product Backlog
- Requirements for each Backlog Item
- User Acceptance Test for each Backlog Item

Procedure:
1. Start with the first Product Backlog Item (Story).
2. Understand this Product Backlog Item by discussing its requirements.
3. Clarify the user acceptance tests.
4. Find the aspects (performance, stability, ...)
5. Find the acceptance criteria.
6. Figure out what its level of done is.
7. Get a clear picture about every Backlog Item.
8. Draw pictures about what needs to be delivered. (flow charts, UML diagrams, scribbles, screen designs)
9. Go back to step 1 - take the next Backlog Item.

Process Check:
Ask the Team, if they can quickly answer the following question, only as a rough guess: *"Can we do the first Backlog Item in this Sprint?"* If the answer is *"Yes"* keep asking until the last Backlog Item you have analyzed so far.

Next - Take a **break**.

After the break:
Start with the process above for the next Backlog Item.

Ending this Process:
1. Stop 20 min before the end of the Sprint Planning #1.
2. Ask again - this time more seriously: *"Can you do the first Backlog Item, ..., the second, ...?"*
3. Stop if they do not believe they can do any more Backlog Items.
4. Now - a very important step: Send out the Product Owner. She really must go! Everyone, except the Team and the Scrum Master, goes away. Customer, End User, everyone else – out!
5. Ask the Team after everyone else left the room: *"Very seriously - Is this the list you believe you can do?"*
6. Hopefully they will now hold a short discussion to find out what they really think they can do.
7. Communicate the answer to the Product Owner and End Users. **No discussion allowed!**

! **Don'ts**
1. You do not resize the Backlog Items.
2. You do not estimate tasks.

Sprint Planning Meeting - Part 2

Purpose:
Metaphor for this meeting: Design. The product development team has the chance to create the design for the solution they want to implement. At the end of this meeting, the Team knows how to build the functionality they want to develop (↗ see Sprint Planning Meeting #1).

Ingredients:

• People who can help the Team to built the solution during the Sprint. F.e. vendors or people from other teams.

• Selected Product Backlog

• Flipcharts, markers, scissors, glue, sticky notes, whiteboards, pencils, crayons...

Basics:
Only the product development team defines the solution. Architects or other people outside the Team are only invited to help the Team. They are not allowed to make design decisions for the Team. The role of these people in the meeting will be defined by the team members only.

!

Don'ts:
1. You do not estimate tasks.
2. You do not assign tasks.

Output:
• Design of your application
• Architecture diagrams, charts, drawings
• Some tasks
• Ensure that the Team has a clear understanding of how to do it!

Procedure:
1. Go to Backlog Item 1.
2. Confirm your understanding of what is wanted by looking at your flipcharts.
3. Run your design session around this backlog item based on questions like:
   • *What interfaces do we need to write?*
   • *What architecture do we need to create?*
   • *What tables do we need to update?*
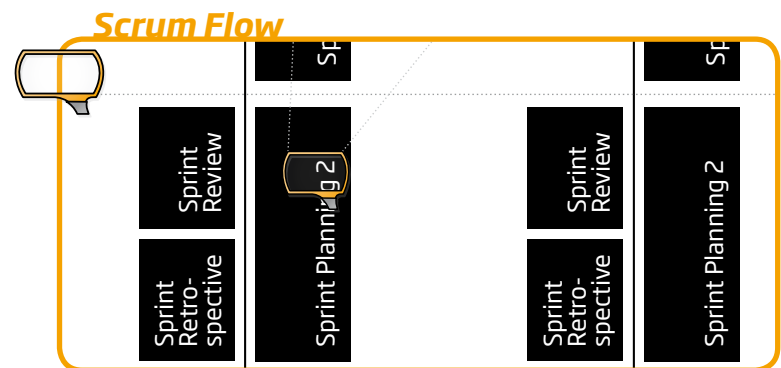   • *What components do we need to update or write?*

When the Team has a clear understanding about the way they want to build that feature, they can move to the next Backlog Item. In the last 10 min of the meeting the team members use sticky-notes to write initial tasks. This helps the team members to know where to start the next day. Put it on the task board. Do not estimate these tasks.

Duration/Location:
60 min/SprintW

60 min per week of the Sprint. Run this meeting right after the Sprint Planning Meeting #1, eg. have lunch as a greater break, but do the Sprint Planning #2 on the same day.

Scrum Flow

Sprint Review

Sprint Retro-spective

Sprint Planning 2

Sprint Review

Sprint Retro-spective

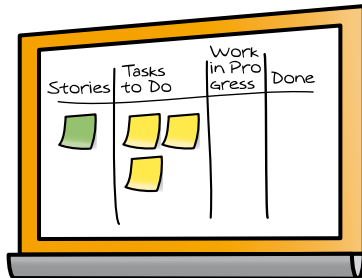Sprint Planning 2

Task board

The task board is a combined visual representation of the Selected Product Backlog and the Sprint Backlog.

- The task board is maintained by the Team only.
- Try to have a big white board. If you have a distributed Team, you may use a software. Check the 'Scrum tools list' on www.borisgloger.com and choose one that fits your needs. Keep things simple, a Scrum tool will not solve problems. It helps you to communicate over distances. Talk about your work, not about your tool.
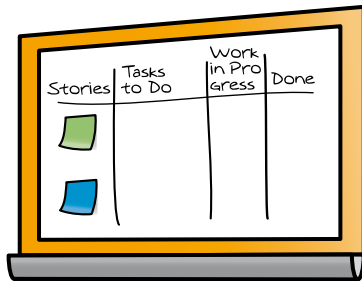
The task board has 4 columns:

1. Selected Product Backlog (Stories)
Put all Product Backlog Items / Stories the Team wants to do in this Sprint in prioritized order into this column.

2. Tasks To Do
To complete a story you need to have usually some tasks done. Collect all necessary not-started tasks that you find for this specific Backlog Item either in the Sprint Planning Meeting or while performing the Sprint in this column.
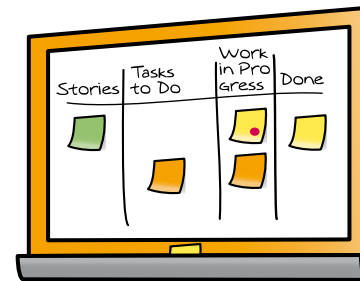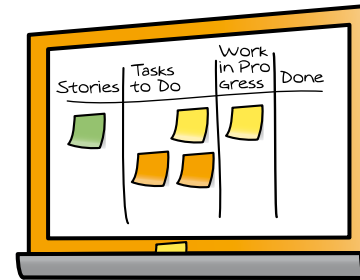
3. Work in Progress
- When a team member starts a task, he moves the card of this task into the 'Work in Progress' column.
- A task that have not been finished since the last Daily Scrum, stays in this column and gets a mark (usually a red dot) on it.
- Try to split the task in smaller tasks when it stays longer than a day in this column. Then put the new tasks into 'Tasks to Do' and remove the parent card. Take a new task and work on it today.
- If a task can not be completed because of an impediment, it gets a red dot and the Scrum-Master notes down an impediment.

4. Done
When a task card is finished than it is put into the 'Done' column by the team member, who worked on it. Start to work on the next card.

Definition of Done

Clearify what "Done" means for your Team by making it visible to the organization. A very good idea is to run a short brainstorming session. Create a list that describes in detail what "Done" means for your Team.*

- Brainstorm about the items in your Team.
- Categorize the items. (Story, Sprint, Release to Integration, Release to Production)
- Sort the items and refine it.
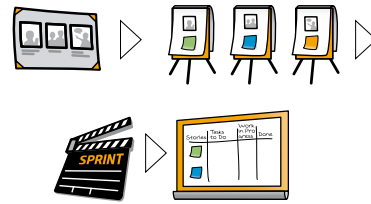- Publish that list to your organization.

Follow this list.

* I got this idea from Mitch Lacey
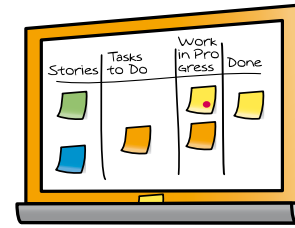
The Scrum Flow

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Product Idea

VISION

Tactical Level

WHAT to do - Sprint Planning 1

HOW to do - Sprint Planning 2

CHECK it - Daily Scrum

	Sprint # 1	Sprint # 2	Sprint # 3	Sprint # 4

9:00

Sprint Planning 1 — Do your Daily Scrum every day!

12:00

Sprint Planning 2 · Sprint Review · Sprint Retro-spective

18:00

Day 1 · Release · Version 1.2
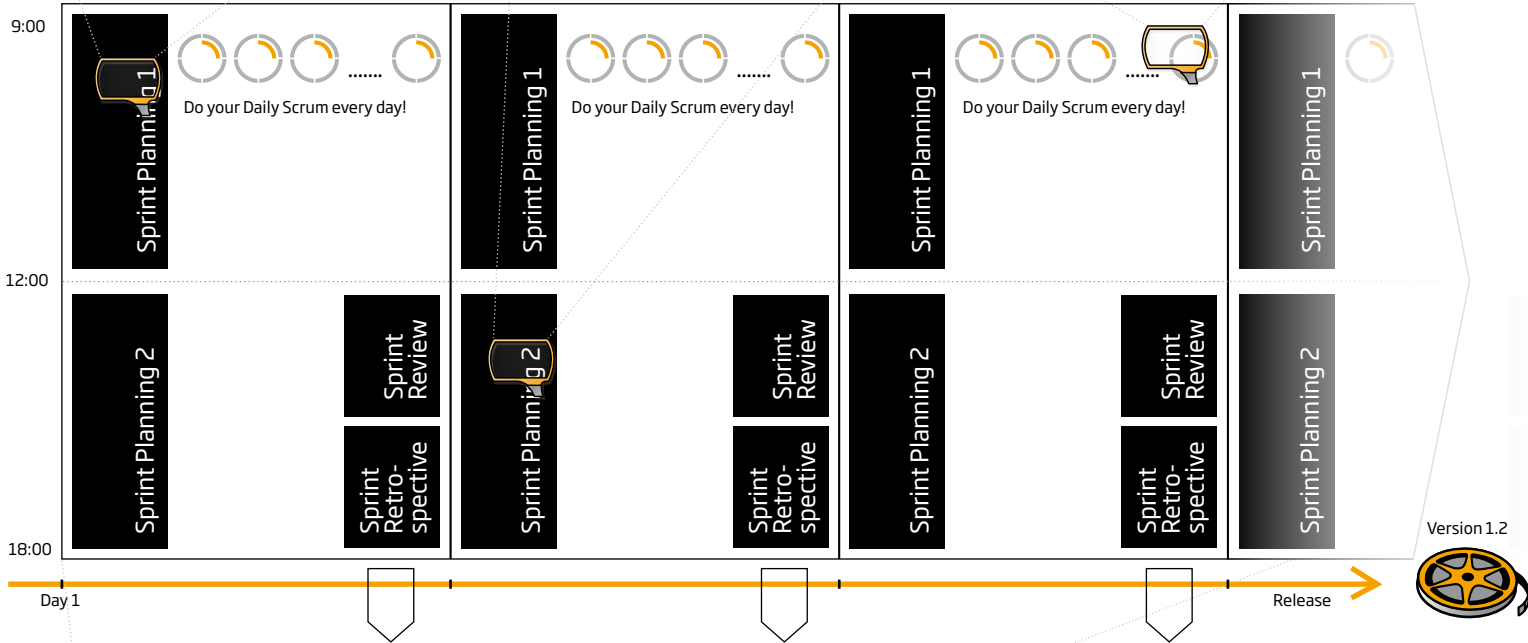
Product Backlog *prioritized*

Estimation Meeting

Releaseplan

version 0.0 · version 1.0 · version 1.3 · version 2.0

Releaseplan Update

version 0.0 · version 1.0 · version 1.2 · version 2.0

Strategic Level

5 · 8 · 13 · Understand · Planning Poker · Play! · 3 · 20 · 8 · 5
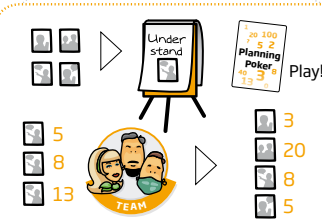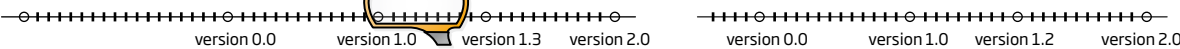
SIZE it - Estimation Meeting

Scrum Roles

Metaphor: We run a movie!

ScrumMaster - *The Film Director*

The ScrumMaster protects the Team from all external disturbances. He is not part of the Team and is its leader and a facilitator. He improves the productivity of the Scrum-Team and controls the "inspect and adapt" cycles of Scrum. He protects the Team and works with the Product Owner to maximize the return on investment. He makes sure that the agile ideals are understood and respected by all stakeholders. However he is not responsible for the delivery of the product.

Team - *The Actors*

The Team delivers the product and is responsible for its quality. The Team works with the requestors: the Customers and the End Users to create the Product Backlog. The Team analyses the Product Backlog Items so that its members will have the necessary information in order to build it. The Team creates the design of the functionality, it tests the Backlog Items and delivers the product as agreed. The Team performs its commitment voluntarily. It is accountable for its work and has to consider the nature of its organization and of the project. The Team also works continuously together with the Product Owner to define the strategic direction of the product development project.

Manager - *The Studio Boss*

Management is essential in a Scrum organization. The Management enables the Team to work by building the right environment for Scrum-Teams. Managers create structures and stability. They also work with the ScrumMaster to re-factor the structures and guidelines when necessary.

Customer - *The Producer*

The Customer is the requestor of the product from the Scrum-Team. She contracts organizations for developing products. Typically these are executive Managers in organizations who buy software development from external software development companies. In an internal product development organization the person who is responsible for approving the budget for a project is in the customer role.

Product Owner - *The Storywriter*

The Product Owner drives the project from the business point of view. She communicates a clear vision of the product and she defines its main characteristics. She also accepts the product at the end of a Sprint. The Product Owner's main responsibility is to ensure that the Team only works on the most important Backlog Items needed by the organization. She has the same goals as the Team and she helps the Team to do its work during a Sprint by not disturbing its members and by giving them all necessary information promptly. The Product Owner is responsible for the return on investment.

End User - *The Audience*

The End User is a role which can be played by a lot of people, for example a marketing department person, the real End User, the best domain expert you have or maybe consultants that have been hired, because of their knowledge. The End User is the one who knows the requirements and with this knowledge he defines the product by telling the Team what he needs from its functionality.

Artefacts

Scrum-Teams use Scrum Artefacts to run Scrum succesfully. They are tools and intermediate work products that enable professional work in challenging environments.

Metaphor: We run a movie!

Impediment Backlog - *The Error List*
The ultimative risk action board. A ScrumMaster uses this list to visualize impediments to the productivity of the Scrum-Team. It also reflects his action items as he needs to remove these blocking issues as fast as possible.

Product Backlog - *The Screen-play*
The Product Backlog is a list. This list contains so called Product Backlog Items (words, stories, requirements, featueres, functionality etc.) a Scrum-Team wants to deliver in future. All the Product Backlog Items in this list are sorted based on business value and return on investment.

Selected Product Backlog - *The Scenes*
The sorted list of Product Backlog Items the Scrum-Team wants to build till the end of a Sprint.

Potential Shippable Product Increment - *An Episode*
The Scrum-Team delivers at the end of the Sprint a Potential Shippable Product Increment. A piece of the product that you would not need to work on again. If development stops right now, it is in a shape that it could be used as it is.

Sprint Backlog - *The Actual Shot*
A list of tasks that enables the development team to visualize its activities. It helps to synchronize the activities of the development team. It is only useful for the development team. It does not reflect progress but shows the current situation of the Team to everybody.

Burn Down Chart

Remember: Tracking of progress is done by the Team. You have to have a Sprint Burn Down Chart
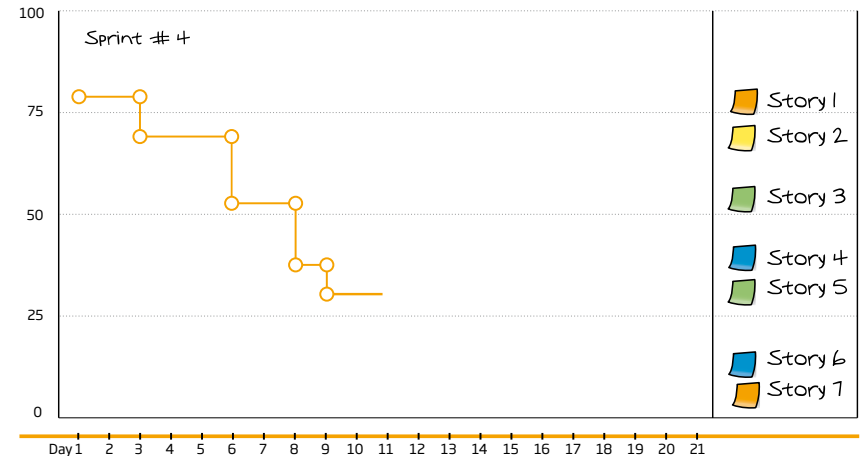
- The Burn Down Chart shows burned Story Points not hours.

- The vertical axis shows Story Points, the horizontal axis shows days of the current Sprint.

- The Team updates the Burn Down Chart on a daily basis.

- In the example above you see on the right the themes the Team wants to tackle in this Sprint.

- A Burn Down Chart needs to be easy to update **by the Team**. Do not make it fancy or complicated to maintain.

Daily Scrum

Purpose:
Metaphor - Time Out. The Team plans and co-ordinates its daily activities and reports and discuss impediments. The task board helps to focus the Team on its daily activities. Update the task board and the Burn Down Chart now!

Ingredients:

- Task board
- Sticky notes
- Markers

InsiderTip:
ScrumMaster – do not stand infront of the Team, or beside the task board. Don't create the atmosphere of pupil and teacher.

Basics:
- The whole Team must be present.
- A team member not able to be present needs to be represented by a teammate.

Duration/Location:
15 min, same time, same location every day.

Output:
- Clear insight into who does what!
- Input for the Impediment Backlog
- Input for the Team Backlog

InsiderTip:
Every team member should, while listening, think about the question: "How can I help him/her to be faster?"

Procedure:
1. The Team gathers around the task board. A circle is a good shape.
2. The person on the left side starts to explain to his teammates what he has achieved by now.
3. Now the person moves the tasks on the task board into the correct column.
4. The person picks a new task if appropriate and puts it into "Work in Progress".
5. If the person has a problem/impediment he reports this to the ScrumMaster.
6. Repeat Step 1 to 5 for each team member.

Don'ts:
1. The ScrumMaster does not ask the questions.
2. Do not report to the ScrumMaster or a Manager.
3. Do not sidetrack the meeting.
4. Do not show up late.
5. Do not overrun the timebox.
6. Do not discuss technical issues.
7. The ScrumMaster does not move the tasks for the team members.
8. The ScrumMaster does not update the Burn Down Chart for the Team.
9. Do not show up unprepared.
10. Not going to the Daily Scrum without informing the Team and having a representative for you.

Scrum Flow

CHECK it - Daily Scrum
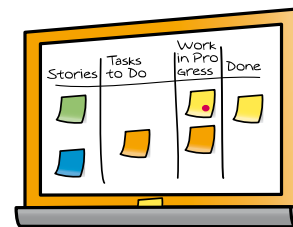
Tactical Level

Sprint Review

Purpose:

Metaphor: Feedback/review of a movie: The Scrum-Team shows the results of their work to the End User. The team member wants to have feedback. This feedback can be used to create or change Backlog Items.

Ingredients:

- Potential Shippable Product Increment showed by the Team
- Task board, sticky notes, markers

Insider Tip:
This is a working session.
It's not about applause,
it's about getting new ideas.

Basics:

The Sprint Review allows every participant to try the new functionality shown by the Team.

!

Don'ts:
1. The Team presents not Potentially Shippable Product Increment.
2. The ScrumMaster does not present the output.
3. The Team does not present to the Product Owner.

Procedure:
1. The Product Owner welcomes the people to the Sprint Review.
2. The Product Owner reminds everybody in the room what the purpose of the Sprint has been: Sprint Goal, Stories the Scrum-Team had selected for this Sprint.
3. The product development team demonstrates the new functionalities and let the End User play with the new functionality.
4. The ScrumMaster facilitates the session.
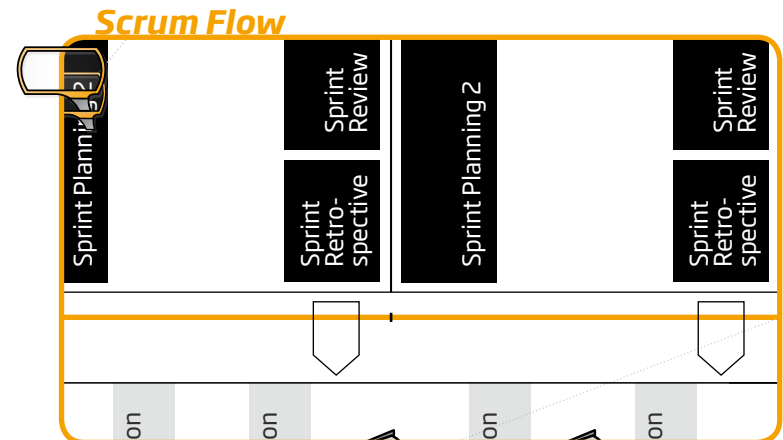5. The Feedback of the End User will be documented by the Product Owner and/or ScrumMaster.

Duration/Location:
90 min, at the end of the Sprint.

Output:
- Feedback from the End User
- Input for the Impediment Backlog
- Input for the Team Backlog
- Feedback from the Team generates inputs to the Product Backlog

Scrum Flow

Sprint Planning 2

Sprint Review

Sprint Retro-spective

Sprint Planning 2

Sprint Review

Sprint Retro-spective

on   on   on   on

Sprint Retrospective

Purpose:
Metaphor: Medical diagnosis! It is not for the determination of the cure, but for finding out what needs to be improved.

Ingredients:

• 2 flipcharts, 1 whiteboard, marker
• Sticky notes

Here grey persons by invitation only!

InsiderTip:
In people's imagination is the past in the left side of the room – the future on the oposite side. Therefore work from left to right. Put the flipchart 'What went well' left and 'What should be improved' in the right corner of the room.

Basics:
Learning from the past for the future.
Improving the productivity of the Team.

Output:
• Input for the Impediment Backlog
• Input for the Team Backlog

!

Dont's:
You do not judge the findings.
Do not have Managers in the meeting.
Do not talk about the findings outside the Team.

Duration/Location:
90 min, a couple of minutes after the review.

Procedure:
1. Prepare 1 flipchart with *"What went well?"*.
2. Prepare 1 flipchart with *"What could be improved?"*.
3. Prepare a timeline with start and end date.
4. Hand out a block of sticky notes to each team member.
5. Start the Retrospective.
6. Do a Safety Exercise.
7. Collect Facts – Do a timeline by handing out sticky-notes. Every team member (ScrumMaster also) writes 1 significant event per sticky note. Do this for 3 - 5 min. Now everyone posts his notes on the timeline and explains the respective event.
8. *"What went well?"* – Same procedure as when collecting facts, but this time you put the sticky notes on the prepared flipchart.
9. Do a separator – to distinguish the *"What went well"* part from the next step.
10. *"What could be improved?"* –
    Run it as the *"What went well"* part.
11. Now group the sticky notes:
    a.) What can we do? → Input for the column Team
    b.) What is not in our control? → Input for the Impediment Backlog.
12. Sort both lists based on the opinion of the team members.
13. Use both lists as an input for the Sprint Planning Meetings #1 and #2 of the next Sprint, and decide there, what you want to do about these findings.

Scrum Flow
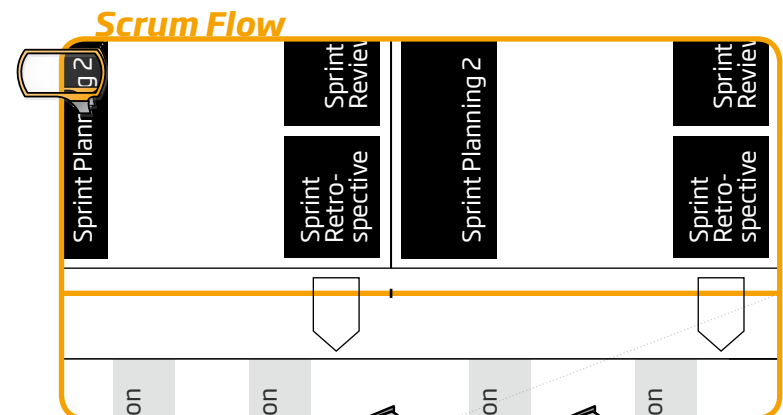
"As a *ScrumMaster* I want to use the Scrum Checklists
to ensure that I run a good Scrum."

"As a *Team* I want to use Scrum Checklists to know what
is expected from me."

"As a *Product Owner* I want to use Scrum Checklists to
be prepared in the next Sprint Planning meeting."

"As a *Customer* I want to read the Scrum Checklist to
have a first understanding about what these people do."

"As a *Manager* I want to use Scrum Checklists to make
sure everyone use the same way doing Scrum."

"As *End User* I want to read the Scrum Checklists to
understand what my role in a Sprint Review is."

The Scrum Checklists will help you
to run a good Scrum!

Have fun using it!

Boris

For up-to-date information, discussions about recent
tendencies in Scrum and more trainings scheduled
please visit **www. borisgloger.com**

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