

SAFe® Iteration Planning

Facilitator's Guide

This guide is for anyone facilitating an Iteration Planning event in a SAFe Agile Team. Iteration Planning is an Agile Team event in which team members commit to the work they will deliver during the upcoming timebox, known as an iteration. The team collaboratively defines a set of Iteration Goals and selects the stories from the team backlog that they believe they can complete to meet those goals. This planning is informed by the team's capacity and historical velocity. The Product Owner and stakeholders are involved to ensure the work aligns with business needs and maximizes value. The primary outcome is a mutual commitment between the team and the business to the iteration goals. The team also creates an iteration backlog of stories to deliver to achieve the goals.

Purpose, Intent, and Outcomes

Purpose

The main purpose of Iteration Planning is for the Agile Team to define, organize, and commit to the work they will deliver in the upcoming Iteration. It's about deciding what you can actually get done.

The Agile Team members use the Iteration Planning event to commit to a set of iteration goals for the upcoming timebox. They plan a set of stories they feel they can complete to achieve these goals.

The business, often represented by the Product Owner or key stakeholders, is involved to validate that the work the team intends to do will move the team and the business in the intended direction.

Intent

The intent is to have the team collaboratively define a set of Iteration Goals and select the most valuable stories (pieces of work) from the Team Backlog that they believe they can complete to meet those goals. The amount of work planned is based on the team's capacity (how much time they have) and their historical velocity (how much work they've completed in the past). The Product Owner (PO) and stakeholders are involved to ensure the work aligns with the business's needs.

Outcomes

A successful Iteration Planning event delivers the following:

- **Mutual Commitment to Iteration Goals:** The team and the business agree on the final Iteration Goals. The team commits to doing their best to meet them, and the business commits not to change priorities during the Iteration.
- **Iteration Backlog:** Stories (including Enablers) are selected, updated, and recorded in the team's iteration backlog. Each story should have defined acceptance criteria and an estimate.
- **Planned Dependencies:** Dependencies with other teams are planned, with stories in each team's backlog to account for them.
- **Shared Understanding:** Everyone understands all necessary internal and external collaborations.

Agenda

Iteration Planning is usually timeboxed to about **90 minutes** for a two-week iteration, but new teams might need more time. The Scrum Master/Team Coach typically facilitates this event.

Step	Time	Description
Close Out Previous Iteration	5 minutes	Move all stories from the previous Iteration to the completed or accepted column. If any stories remain, decide what Iteration they'll move to and who will work on them.
Establish Team Capacity	5 minutes	Each team member shares any time off or other duties that may be unavailable (e.g., training). Use the team's historical velocity as a starting point and adjust it based on unavailable time to determine the actual capacity for this Iteration.
Story Analysis and Estimation	20-30 minutes	The team, with the PO, selects the most valuable stories. Discuss each story's difficulty, size, complexity, and

Step	Time	Description
		acceptance criteria. Planning stops once the team reaches capacity.
Develop Iteration Goals	5-10 minutes	The team summarizes the planned work into a few high-level Iteration Goals that describe what they plan to accomplish.
Commit to Iteration Goals	5-10 minutes	Revisit the goals and commit as a team, often with a team vote.

Preparation Checklist

Before the event, prepare the following:

Location and Time:

- Set a regular time that everyone on the team knows and can attend.

Backlog:

- Ensure the team's backlog has enough stories for the upcoming Iteration.
- Check that the backlog has been refined (stories are well-understood).

Capacity:

- If using a team capacity tracker, ensure it accounts for all known holidays or days off.

PI Objectives:

- Review the team's PI Objectives. Prioritize stories that support feature releases and PI Objectives.
- The PO may prepare an initial draft Iteration Goals if the Agile Team finds it helpful.

Tips and Tricks

Remote Facilitation

If you're having an event online, remember these tips:

- **Limit Time:** Try to limit the event time or offer regular breaks.
- **Visualize Work:** Ensure the work being planned is visible to everyone (e.g., via a shared digital board).
- **Share Goals:** The person writing the Iteration Goals should share their screen.

- **Voting:** Find a remote-friendly way to hold a team vote of confidence and always discuss any low votes with curiosity rather than judgment.
- **Involve Everyone:** Actively ask all teammates if they are comfortable with the plan.

Overcoming Challenges

Potential Issue	Way to Overcome
The entire team is routinely over capacity	Present data showing how often the team is over-planning or how much work carries over. Brainstorm solutions as a team and decide on action items for the next planning session. Team members can act as accountability partners.
Only some team members are speaking throughout the event	Use a "Round Robin" technique for specific discussion points. In a physical event, simply look at each person in order. In a virtual event, ensure each person gets a chance to unmute and share, so no one is missed. Remind the team that a simple "I agree" or "No concerns" is a valid response, and that the goal is to hear everyone's voice, not to force a long monologue.
One teammate shares that they are not confident in the planned work	This is a good thing! It means your team is sharing thoughts honestly. Ask the reason with curiosity (no judgment) and listen carefully. Help the team discuss what actions can be taken to improve the plan.

Post-Event Actions

After the Iteration Planning is over, don't forget to:

- Adjust Agile tools to align with the planned work and the team's capacity for the upcoming Iteration.
- Share the new Iteration Goals in the appropriate communication channels.
- Plan any necessary conversations with other teams that your team depends on, or that depend on your team.