



Momentum

Process Manual

Overview

This manual outlines enhancements to the Scrum process, addressing critical gaps that traditional Scrum leaves for teams to resolve independently.

A key addition is the formal definition of a **sprint plan**. Rather than relying on teams to conceptualize sprint execution abstractly, or defaulting to story points as a mechanism for limiting scope, this manual prescribes a structured planning approach.

The resulting plan provides actionable data, enabling teams to evaluate performance and make informed adjustments. This transforms the Retrospective from a passive ritual into a meaningful feedback mechanism.

A central theme of this approach is the emphasis on **team tactics and strategy**.

Without defined tactics, teams lack the ability to improve. It is preferable to adopt an imperfect tactic and refine it than to operate without any tactical framework.

To facilitate this, this manual explicitly refers to situations where tactics must be invoked. This is not meant to be a comprehensive list. Only a starting point for teams to begin thinking about their tactics.

Strategy is the overall plan. That includes planning tactics for when things go right in addition to responding to things going wrong.

Teams should expect to encounter problems that appear intractable. They must revisit foundational assumptions and test their validity to solve. Intuition should not be used as the primary guide. Effective solutions are often counterintuitive in complex systems. **If the solution were intuitive, you would not have a problem.**

Planning

	Wed	Thu	Fri	Mon	Tue	Wed	Thu	Fri	Mon	Tue
	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----
JB/CC	-----					TCKT-1311 (L)				
AR/AY	-----	TCKT-1234 (S)								
AY/AR		-----	TCKT-1421 (S)							
AR/AY			-----	TCKT-1555 (M)						
CC/JB						-----	TCKT-1312 (M)			

Size	Time	Points
Small	1 to 2 days	3
Medium	3 to 4 days	5
Large	5 days	8

Download Template

Planning

The goal of Planning is to **create reliable predictions that lead to a successful sprint**. A sprint is successful when 100% of stories are complete. Failed sprints are when stories remain incomplete at the end of the sprint. Typically assessed in the retrospective on the last day.

Failure is acceptable (and occasionally desirable!) as long as the team refines the planning sprint over sprint by using data in their Retrospective to understand how to deliver faster. Never fear failure but don't normalize it.

Story sizing is mathematically computed based on time and thus follows the table below.

Size	Time	Points
Small	1 to 2 days	3
Medium	3 to 4 days	5
Large	5 days	8

Step 1: Add user stories to the sprint backlog as usual

Step 2: Use the planning template to estimate when each story can be completed. Use team member initials to mark who's planned to work on a story. Team members **must** be assigned to only **one** story at a time. Pairing should be planned for each story and can involve two or more team members.

Step 3: Review the initial plan and consider whether reordering stories would improve overall team utilization.

Step 4: Create slack time. Reserve at least one unallocated day at the end of the sprint. Two unallocated days are recommended for teams new to this process. Remove stories as needed to accommodate this buffer.

Step 5: Start the sprint once team is confident with plan

Daily Stand-Up

During the daily stand-up we will be updating the Plan document with the “actual” timings of progressing work.

Timings recorded in the plan are **not** to be treated as fixed commitments. They serve as indicators to help the team identify and respond to deviations from the expected flow of work.

It is possible and acceptable for these predictions to be inaccurate. If a story fails to complete within the sprint it should be examined during the Retrospective.

Actuals are represented in the text template with equal signs (=) instead of dashes (-). If you decide to use a different tracking mechanism, make sure actuals are visually different from plan.

If assignments end up different from plan, record the initials to the left of the actual line. This is not required if the planned individuals work the story.

	Mon	Tue	Wed	Thu	Fri	
	-----	-----	-----	-----	-----	
JB/CC	-----					TCKT-1311 (L)
	=====					
AR/AY	-----	TCKT-1234 (S)				
	-----	=====				
DC/UR	-----	TCKT-1234 (S)				
	-----	=====X				

Illustration: Actuals are recorded as a thicker line underneath the plan line. Lines do not receive a terminator until the story is completed or failed.

Daily Stand-Up

The goal of the Daily Stand-up is to **respond to problems** in the sprint. Under no circumstances should the “three questions” be asked. The relevant information is already reflected in our tracking.

Step 1: Look at the stories “in progress”. Perform the following steps 2-5 for each story.

Step 2: If a story is complete, record the end date as the current day. Use the planning document to identify the next available work for each team member. If some team members are blocked from starting new work, invoke team tactics to realign resources.

Step 3: Update the plan document with the actuals for the story. The actual will always take up the current day since we won't measure again until tomorrow. Thus one day is the shortest possible actual to be shown.

Step 4: Determine whether the story has exceeded its expected duration. A one-day grace period may be granted if the team is confident of completion. When grace period has been exhausted, execute the team's predefined escalation tactic (e.g. swarming)

Step 5: If the story remains on track, allow team members to raise concerns or request support. If any early warning signs are identified, apply the appropriate team tactic to address them.

Step 6: If a new story must be added mid-sprint, execute team tactics such as removing an unstarted story. Expect the maximum estimated duration. (e.g. a Medium story should assume 4 full days) Track this new story using actuals only; do not add a planned line.

It is okay for the stand-up to end in a few minutes if there are no issues. Do not prolong the meeting unnecessarily.

Daily Stand-Up

	Mon	Tue	Wed	Thu	Fri	Mon	Tue	Wed	Thu	Fri
	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----
JB/CC	-----					TCKT-1311 (L)				
	=====			=====		(Work paused on Wednesday creating a gap)				
AR/AY	-----	TCKT-1234 (S)								
AR/CC	=====	(Work has been started)								
AY/AR	-----			TCKT-1421 (S)						
				=====		(Work completed)				
AR/AY				-----		TCKT-1555 (M)				
						===== (Work is running late)				
CC/JB						-----		TCKT-1312 (M)		
						=====X (Story Failed)				

Daily Stand-Up

The goal of the Daily Stand-up is to **respond to problems** in the sprint. Under no circumstances should the “three question” be asked. That information is already embedded in our tracking.

Step 1: Look at the stories “in progress”. Perform the following steps 2-5 for each story.

Step 2: Update the plan document with the story actuals. The actual will always take up the current day since we won’t measure until tomorrow. This means that 1 day is the shortest possible actual to be shown.

Step 3: Check if the story is over time. There is one extra day of grace period, but only if the team strongly feels that the story will get done. If a full day has passed, trigger the team’s planned response. For example, a common tactic is to swarm. I.e. Stop everything else and focus on the problem story.

Step 4: If the story is still “on time”, give the team a chance to raise any concerns and ask for help. Team tactics for early concerns should be triggered.

Step 5: If a story is complete, mark the end of the story as today and use the plan to determine the next work for the team members. Note that team tactics may need to be invoked if not all resources are available to start the next story.

Step 6: If any new stories must be brought in, invoke team tactics for this. You likely will need to trade an existing story that has not yet started. Make sure the story is sized so that “late” can be determined as the longest time for that size. (e.g. A medium will plan for 4 days.) Track the work as an actual with no plan line.

It is okay for the stand-up to end in a few minutes. If nothing needs to be addressed, don’t hold people.

Daily Report

Gaining comfort across all levels of management is achieved by being open with “how the sausage is made”.

Send an email similar to this one each day after the stand-up. Leaders will see issues arise and see how the team reacts to correct the issues, thereby raising confidence levels.

Include a **summary** describing the current state of the sprint. Take a screenshot of the **burn down** chart from JIRA (or similar system) and include that in the email.

Include useful **progress** metrics like the day of the sprint, numbers of stories complete, and percentages for each metric.

Include a **stories** breakdown at the end of the email detailing how long stories have been in progress and their status based on plan.

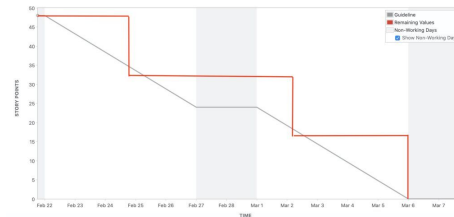
TO: team@company.com, manager@company.com

Subject: Day 7 of Sprint “Valhalla”

Summary

2 stories are complete. 1 story is late. Team has decided to swarm on the late story, delaying addressing the story that is a day over until the late story is fixed.

Burn Down



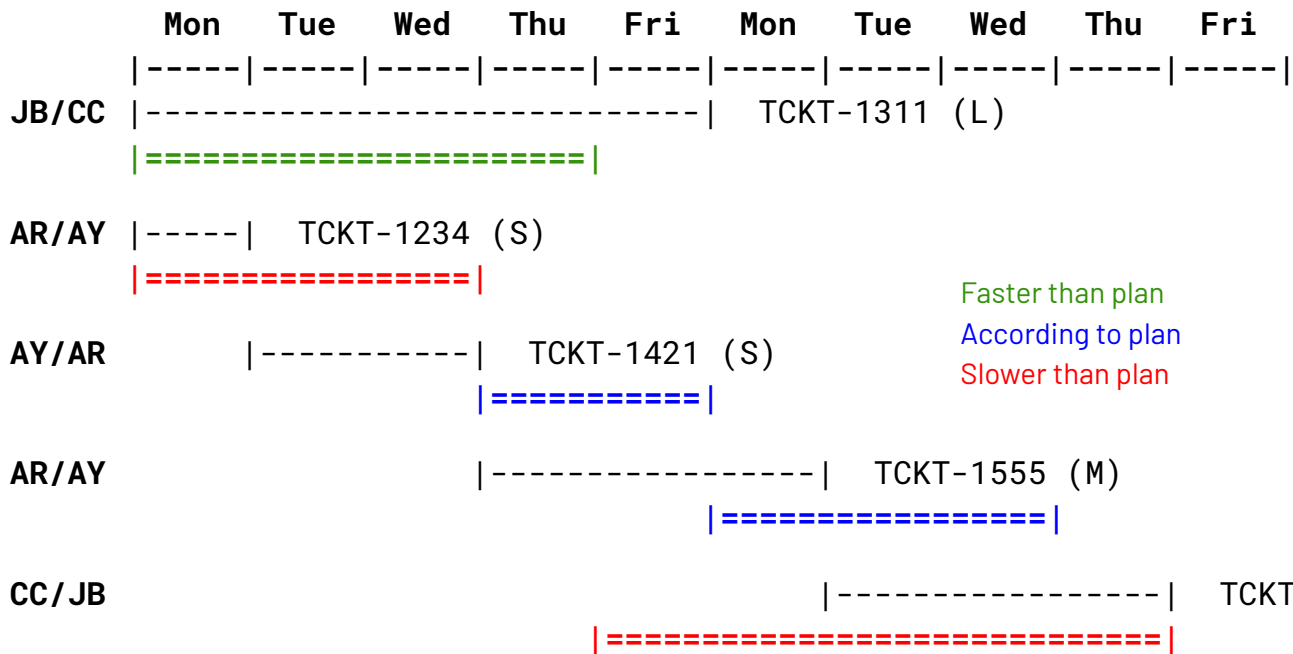
Progress

Sprint Day: 7 of 10 (70%)
Story Progress: 2/5 (40%)

Stories

Story	Description	Days	Status
TCKT-1234	Add button to home screen	3	Done
TCKT-1235	Add tab for new site section	1	In Progress
TCKT-1236	Value per customer report	4	In Progress
TCKT-1237	Faster homepage load	5	Late
TCKT-1238	New Report filters		Not Started

Retrospective



Story Findings

- 0 reserve days used
- 1 faster than plan (-1 day / 10%)
- 2 slower than plan (+4 days / 40%)
- 2 according to plan
- 0 wasted work
- 3 story points below average

Retrospective

The goal of the Retrospective is to **improve the delivery process**. Discussions must be grounded in data rather than intuition or emotion.

Step 1: Copy the Plan into a Slide Deck

Step 2: Color code the “actuals” with Green if the story took less time than expected, Blue if the story took exactly as long as expected, Red if it took longer than expected or if the story failed the sprint.

Step 3: Choose a story to discuss. Red stories are good options to discuss as they took longer than expected. Green stories are also good options as they may reveal practices that the team wants to do more of.

Move to Blue when others have already been discussed and consider if it was possible to delivery faster.

Step 4: Discuss new strategies or tactics for how the story delivery might be improved in the future. If the team agrees to try a new strategy or tactic, document it as an action item.

While technical solutions may be part of the discussion, the primary focus must remain on delivery speed and effectiveness, not technical detail.

Step 5: If time remains, go ahead and run the “*What went well, what could be improved*” questions. Use voting to decide what to discuss. Discuss the highest rated item that hasn’t been discussed. Consider using [EasyRetro](#) to ease this process.

Step 6: End on time. No exceptions. While this may be unpopular, it is critical to encourage the team to prioritize their discussions.

Retrospective

FAQ

Can managers attend retrospective meetings?

If the manager is willing to be a leader, they should be welcomed in the retrospective. The manager should avoid blame, encourage team members, stick to the facts, and help ensure good process.

Consider attending as-needed to give the team opportunities to practice.

Can we extend the meeting if we need more time?

Retrospectives are expensive meetings. They must start and end on time. If you are talking about highest priorities, this will not be a problem. You can discuss old data points in future meetings if they become relevant.

Common Pitfalls

“We didn’t size large enough”

This is self-evident. The solution is **not** to size larger next time. Examine the assumptions that went into sizing to identify why it took longer than expected.

“We were blocked by another team”

The team’s job is to find a way to succeed despite external blockers.

“My fault. I’ll do better next time.”

This is a no-blame activity. We’re not here to find fault, we’re here to understand and improve. Examine the causes of the failure instead of discussing blame.

Questions?

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