

Iteration Plan *& Review*

One record per iteration: what the team commits to and why, then what it finished, what users said, and what changed in the backlog.

USE WHEN	OWNER	APPROACH	TIER
Part A at iteration planning · Part B at the review	Team with the product owner · facilitator keeps it	ADAPTIVE / HYBRID	Standard

HOW TO USE THIS TEMPLATE

1. At planning, agree the goal, check capacity, and pull only items that pass the Definition of Ready.
2. Commit the points the team can finish; mark anything extra as stretch.
3. Update the burndown (section 8) daily, or at least twice a week.
4. At the review, record what was accepted, what users said, and what changed in the backlog.
5. Carry the actions into the retrospective (T72) and the release forecast (T26).
6. Delete guidance text (*italic*) before sharing.

Project name · product	
Iteration · release (T26)	
Product owner · facilitator	
Prepared by · version · date	

Terms. **Iteration goal:** the one outcome the iteration exists to deliver. **Definition of Ready:** the checks an item must pass before it enters an iteration (practice, not PMI-defined). **Definition of Done:** the checks a finished item must pass (Agile Practice Guide). **Velocity:** points accepted in the iteration; unfinished items earn nothing (Agile Practice Guide). **Burndown:** points left in the iteration, day by day.

PART A

Plan · at iteration planning

1 Iteration goal and dates

One sentence on the outcome, not a list of stories. Test: if half the items slipped, the team could still tell whether the goal was met.

Iteration goal			
Start · end			
Review · retrospective			

2 Capacity

List who is on the team this iteration and the days each can give. Note leave, holidays, onboarding, and time on other work. Points offered is the planned velocity adjusted for availability. Test: a new member's ramp-up shows here, not as a surprise at the review.

PERSON OR ROLE	DAYS AVAILABLE	AVAILABILITY %	NOTES
Planned velocity · recent average · points offered			

3 Committed items · Definition of Ready check

Write your team's Definition of Ready items in the key (from the team charter, T15). Tick each item a story passes. A story that fails any check stays in the backlog until it is fixed. List committed items first, then stretch. Test: committed points do not exceed points offered.

DoR key	1	2	3	4	5

ID	STORY	POINTS	DOR 1	DOR 2	DOR 3	DOR 4	DOR 5	COMMITTED · STRETCH	OWNER
			☐	☐	☐	☐	☐		
			☐	☐	☐	☐	☐		
			☐	☐	☐	☐	☐		
			☐	☐	☐	☐	☐		
			☐	☐	☐	☐	☐		
			☐	☐	☐	☐	☐		
			☐	☐	☐	☐	☐		
			☐	☐	☐	☐	☐		
			☐	☐	☐	☐	☐		

Points · committed · stretch		
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4 Risks and dependencies

Anything that could stop an item finishing this iteration. Link it to the risk register (R-##) or issue log (I-##) when it is already there. Test: each one has an owner and a dated action.

RISK OR DEPENDENCY	TYPE	AFFECTS	OWNER	ACTION · BY WHEN

PART B

Review · at the end of the iteration

5 Completed vs. committed

Accepted means the product owner agreed at the review that the item meets its acceptance criteria and the Definition of Done. Partly done counts as not done: record where the unfinished item goes and why. Test: velocity equals the points of accepted items only.

ID	STORY	POINTS	ACCEPTED	IF NOT ACCEPTED: WHY, AND WHERE IT GOES
			☐	
			☐	
			☐	
			☐	
			☐	
			☐	
			☐	
			☐	

Points · committed · completed
(velocity) · carried over

Iteration goal met?

☐ Yes ☐ Partly ☐ No

6 Demo outcomes and stakeholder feedback

What was shown, who saw it, and what they said, in their words where you can. Every piece of feedback gets an action, even if the action is "no change." Test: feedback that changes the product appears again in section 7.

ITEM SHOWN	FEEDBACK	FROM	ACTION

7 Backlog changes

Record each change made during or because of this iteration: added, removed, split, reordered, carried over, or re-estimated. The product owner decides order within the release. A change that moves a date, needs money, or adds or drops a charter deliverable needs a change request (T65; the change management plan, T48, sets the line). Test: every Yes has a CR ID.

CHANGE	ID	REASON	DECIDED BY	CR NEEDED · ID

8 Metrics

Burndown: write the points left at the end of each day. The ideal row falls evenly from committed points to zero. A flat stretch means work is stuck; a rise means scope came in. Copy velocity and the release figures to the metrics tracker (T84) and the release plan (T26). Test: the release forecast is re-run with the new average.

DAY	1	2	3	4	5	6	7	8	9	10
Date										
Ideal points left										
Actual points left										

Velocity · rolling 3-iteration average		
Release points done · remaining		
Forecast note · retrospective date (T72)		

Product owner · accepted at review · date

Facilitator · date

COMPLETED EXAMPLE · ILLUSTRATIVE

Client Onboarding Portal · Northfield Creative Group (fictional marketing and design agency)

Sprint 2 of 6, Release 1 (T26) · product owner Marcus Reyes · facilitator Amy Price · planned Wednesday, March 3, 2027 · reviewed Tuesday, March 16, 2027.

Part A · Plan

Iteration goal

A new client's contact reaches the CRM without retyping, and only assigned staff can see a client's files.

Dates

Mar 3 to 16 · review Tue Mar 16, 2:00 (recorded for coordinators) · retrospective after the review

Capacity

Clearpath delivery lead 10 days · Clearpath consultant 10 days · new Clearpath consultant 8 days, starts Mar 4, sandbox access pending (R-03) · Marcus Reyes about half time · Amy Price facilitates · two coordinator representatives at the review

Velocity

Planned 13 (T26) · Sprint 1 actual 14 (US-01, US-04, stretch US-05) · points offered 13

DoR key (T15): 1 acceptance criteria agreed · 2 sized · 3 CRM or data-field dependencies named · 4 privacy impact noted · 5 fits in one sprint

ID	STORY	PTS	1	2	3	4	5	TYPE
US-12	New client contact syncs to the CRM	8	Yes	Yes	Yes	Yes	Yes	Committed
US-09	Only assigned staff see client files	5	Yes	Yes	Yes	Yes	Yes	Committed
Committed 13 · stretch 0		13	US-09 passed check 4 when Elena Torres's privacy note arrived Mar 2 (not Ready at the Feb 11 refinement)					

RISK OR DEPENDENCY	OWNER	ACTION · BY WHEN
R-01 CRM integration may not sync cleanly (US-12)	Priya Shah	Integration test Mar 12 is the trigger
R-03 new Clearpath consultant without sandbox access	Clearpath lead	Access by Mar 5; escalate to Amy Price if not
R-02 coordinators missing reviews (I-04)	Marcus Reyes	Reviews on Tuesdays and recorded from this sprint

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COMPLETED EXAMPLE · ILLUSTRATIVE · CONTINUED

Part B · Review, Tuesday, March 16, 2027

ID	STORY	PTS	ACCEPTED	IF NOT: WHY, AND WHERE IT GOES
US-09	Only assigned staff see client files	5	Yes	Role tests repeat in UAT (CO-02)
US-02	Log in with a two-step check	5	Yes	Pulled in from Sprint 3 on Mar 12
US-12	New client contact syncs to the CRM	8	No	Test Mar 12 created duplicate contacts (R-01 occurred, I-01). Clearpath fixes under the fixed price; retest Mar 24. Carried to Sprint 3
Committed 13 · completed 10 · carried over 8		10	Goal met: Partly (file access done; CRM sync not)	

ITEM SHOWN	FEEDBACK	FROM	ACTION
Clearpath e-signature	Native signing covers the contract step; no custom build needed	Marcus Reyes, Elena Torres	O-01 confirmed; to steering Mar 18 (D-06), then CR-01
Two-step login	Text code works; one coordinator asked for an email code option	Coordinator rep	New idea for Release 2; not numbered yet
File access by role	Studio leads want to see all clients in their studio	Studio lead	No change: access stays by assignment (CO-02)

CHANGE	ID	REASON	DECIDED BY	CR
Pulled forward	US-02	Kept the team busy while US-12 was blocked	Marcus Reyes	No
Carried over	US-12	Duplicate-contact defect; top of Sprint 3	Marcus Reyes	No
Re-scope pending	US-08	Use Clearpath e-signature instead of a custom step	Dana Whitfield	Yes · CR-01

DAY	1	2	3	4	5	6	7	8	9	10
Date	3/3	3/4	3/5	3/8	3/9	3/10	3/11	3/12	3/15	3/16
Ideal	13	12	10	9	7	6	4	3	1	0
Actual	13	13	13	13	13	8	8	13	13	8

Flat for five days while the team set up the new consultant (I-03, closed Mar 9). US-09 accepted Mar 10. The rise on Mar 12 is US-02 pulled in (+5). US-12 stays at 8.

Velocity · rolling average	10 · 12 (two sprints)
Release points done · left	24 of 78 · 54 left
Forecast	On track at 13; 1 point short at 12. Re-forecast at the Sprint 3 review, Mar 30 (T26)

Accepted by Marcus Reyes, March 16, 2027 · retrospective the same afternoon (T72).