

Release *Plan*

Turns the ordered backlog into a dated plan for each release: what ships, in which iterations, at what pace, and how sure the team is of the date.

USE WHEN After the backlog is estimated; updated after every iteration review	OWNER Product owner with the team · PM facilitates · sponsor informed	APPROACH ADAPTIVE / HYBRID	TIER Standard
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HOW TO USE THIS TEMPLATE

1. Name each release and its goal, taken from the roadmap (T23) and story map (T24).
2. Set iteration dates and the team's capacity, then agree a velocity range.
3. List the release scope by feature from the backlog (T25); mark committed and stretch.
4. Place features on the timeline, name dependencies, and agree release criteria.
5. Forecast with low, expected, and high velocity; re-forecast after every review.
6. Delete guidance text (*italic*) before sharing.

Project name

Product · product owner

Backlog version · as of

Iteration length · calendar

Prepared by · version · date

TERM	WHAT IT MEANS	TERM	WHAT IT MEANS
Release	A set of features delivered to users together, with its own goal and date.	Velocity	Points the team finishes in one iteration. Used to forecast, never to compare teams (Agile Practice Guide).
Iteration	A fixed time-box, often two weeks, in which the team finishes a set of stories. Scrum calls it a sprint.	Capacity	How much the team can take on in one iteration, after leave, holidays, and other work.
Committed · stretch	Committed scope is what the release date protects. Stretch scope ships only if pace allows (practice).	Forecast range	Low, expected, and high velocity give the latest, likely, and earliest finish (practice).

1 Releases

One row per release, in order. The goal is one sentence on the outcome for users, not a feature list. Funding says whether the release is inside the approved budget. Test: someone outside the team can tell from the goal what users get.

#	RELEASE	GOAL	START · END	ITERATIONS	LIVE DATE	FUNDING	OWNER
1							
2							
3							

2 Capacity and velocity

One row per iteration in the release. Availability is the share of a normal iteration the team can give (leave, holidays, onboarding, other work). Planned velocity is the expected points for that iteration, adjusted for availability; plan the first iteration lower while the team sets up. Test: every holiday and known absence appears in a note.

ITERATION	DATES	WORKING DAYS	AVAILABILITY %	PLANNED VELOCITY	NOTES (HOLIDAYS, LEAVE, SETUP, OTHER WORK)

Velocity basis

Velocity range (points per iteration)

LOWEXPECTEDHIGH

Basis: past velocity of this team, or of a similar team on similar work, or a first-release guess. A new team has no velocity yet; plan to a range and replace it with the measured average after three iterations.

3 Release scope

One row per feature (or part of a feature) for the release, in backlog order. List the story IDs from T25 and the sum of their points. Committed rows must fit inside the low or expected forecast; stretch rows sit on top. Priority uses the MoSCoW levels in T18. Test: committed points are at or below expected velocity × iterations.

#	EPIC · FEATURE	STORY IDS	POINTS	PRIORITY	COMMITTED · STRETCH	TARGET ITERATION	DEPENDS ON	NOTES
1								
2								
3								
4								
5								
6								
7								
8								
9								
10								
11								
12								
13								
Totals · committed · stretch · all						Points, typed by hand (form fields don't calculate)		

4 Iteration timeline

Write the iteration end dates in the second header row. For each feature, mark X in the iterations where its stories are planned; mark M for a milestone (UAT, go-live). Shade or circle stretch work if you print it. Test: no iteration holds more planned points than its planned velocity.

FEATURE (FROM SECTION 3)	IT 1	IT 2	IT 3	IT 4	IT 5	IT 6	IT 7	IT 8	TEST · UAT	LIVE	POINTS
Iteration ends											
Planned points per iteration											

5 Dependencies

Anything outside the team that a feature needs before its iteration starts: a specification, a decision, data, vendor access, a sign-off. Needed by = the iteration that stalls without it. Test: every dependency has a named owner and a date before that iteration starts.

#	DEPENDENCY	FEATURE OR STORIES	NEEDED BY	OWNER	DUE	STATUS
1						
2						
3						
4						
5						
6						

6 Release criteria

What must be true before the release goes live. Name the evidence and who confirms it. Keep the thresholds here (pass rate, defect priority) consistent with the quality plan (T32). Tick Met at the go/no-go review.

#	CRITERION	THRESHOLD · EVIDENCE	CONFIRMED BY	MET
1	Every committed story accepted against the Definition of Done			☐
2	User acceptance testing passed at the agreed pass rate			☐
3	No open defects above the agreed priority			☐
4	Compliance and security checks passed (accessibility, privacy, access)			☐
5	Users trained and support ready			☐
6	Go/no-go decision recorded by the agreed authority			☐
7				☐

7 Forecast and confidence

Points remaining ÷ velocity = iterations needed. Run it three times. Then read across: does committed scope finish by the last iteration in every case? If the low case misses, the confidence is not High; say which response you would use. Velocity is a measured pace, not a target: hold the date and committed scope, let stretch flex. Test: the forecast is updated after every iteration review.

CASE	VELOCITY	POINTS BY LAST ITERATION	COMMITTED DONE BY	STRETCH INCLUDED	WHAT IT MEANS
Low					
Expected					
High					

Points remaining · as of	
Confidence in the release date	☐ High: committed scope fits even at low velocity ☐ Medium: fits at expected, not at low ☐ Low: misses at expected
If the low case comes true, we will	
Re-forecast cadence · re-plan point	

Product owner signature · date

Project manager signature · date

Sponsor informed · date

COMPLETED EXAMPLE · ILLUSTRATIVE

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

Release plan v1.0, Tuesday, February 16, 2027 · Marcus Reyes (product owner) with the Clearpath delivery lead and two configuration consultants; Amy Price facilitating · backlog as of the February 11 refinement (T25) · two-week sprints, Wednesday to Tuesday · shared with the steering committee February 18.

#	RELEASE	GOAL	START · END	ITERATIONS	LIVE DATE	FUNDING	OWNER
1	Release 1 · MVP	A new client is ready to start in two days, with nothing retyped	Feb 17 to May 11, 2027	6	Jun 1, 2027	In budget (portal \$112,800)	Marcus Reyes
2	Release 2	Remove the friction found in UAT and the first weeks live	Jul to Sep 2027	To plan	Sep 2027	Post-launch backlog	Marcus Reyes

ITERATION	DATES	WORKING DAYS	AVAILABILITY	PLANNED VELOCITY	NOTES
Sprint 1	Feb 17 to Mar 2	10	80%	11	Environment setup and sandbox access; first sprint together
Sprint 2	Mar 3 to 16	10	100%	13	CRM integration test Mar 12 (Priya Shah)
Sprint 3	Mar 17 to 30	10	100%	13	Review Mar 30 = Clearpath 30% payment and formal re-forecast
Sprint 4	Mar 31 to Apr 13	10	100%	13	Security review Mar 29 to Apr 9 (outside the team)
Sprint 5	Apr 14 to 27	10	100%	13	Trial migration Apr 12 to 22 (Priya Shah)
Sprint 6	Apr 28 to May 11	10	100%	13	Last sprint; UAT May 12 to 21 follows
Release 1 · six sprints · 60 working days				76	Expected points across the release

Velocity basis: no shared history yet. Clearpath's two most recent portal projects of similar size averaged 12 to 14 points a sprint with a team this size. **Range:** low 11 · expected 13 · high 15 points a sprint; Sprint 1 planned at 11 in every case. Replace with the measured average after Sprint 3.

COMPLETED EXAMPLE · ILLUSTRATIVE · CONTINUED

Release 1 scope · 78 points

EPIC · FEATURE	STORIES	PTS	PRIORITY	TYPE	SPRINT
EP-01 · Invitations	US-01, US-02, US-03	13	Must	Committed	S1, S3, S5
EP-01 · Welcome page	US-14	2	Must	Committed	S4
EP-02 · Online brief	US-04, US-06	11	Must	Committed	S1, S4
EP-02 · Online brief	US-05	3	Should	Stretch	S1 or S6
EP-03 · Signing	US-07, US-08, US-15	16	Must	Committed	S3, S4
EP-04 · Credit check	US-10, US-11	7	Must	Committed	S5
EP-05 · Access control	US-09	5	Must	Committed	S2
EP-05 · CRM integration	US-12	8	Must	Committed	S2
EP-05 · Reporting	US-13	8	Must	Committed	S6
EP-05 · Reporting	US-21	5	Should	Stretch	S6
Committed 70 · stretch 8		78			

US-08 (13 points) was split at refinement into US-08 sign the contract in the portal (8) and US-15 signed contract stored with its retention rule (5).

Dependencies

DEPENDENCY	NEEDED BY	OWNER	DUE
CRM sync specification (WBS 1.3.1) for US-12	S2	Priya Shah	Mar 2
Privacy note on file visibility for US-09	S2	Elena Torres	Mar 2
Retention schedule (WBS 1.1.2) for US-15	S4	Elena Torres	Mar 9
Credit check test account for US-10, US-11	S5	Clearpath lead	Apr 13
Coordinators at every sprint review (AC-04)	All	Marcus Reyes	Ongoing

Release criteria (from T32 and T12): all committed stories accepted against the DoD (T15) · UAT first-run pass 95% or better, zero Priority 1 · accessibility (CO-04) and role tests (CO-02) passed · security review passed Apr 9 (M04) · 6 coordinators trained by May 28 · steering go/no-go May 24 to 27.

Timeline

FEATURE	S1	S2	S3	S4	S5	S6	UAT	LIVE	PTS
Ends	3/2	3/16	3/30	4/13	4/27	5/11	5/21	6/1	
Invitations (US-01, 02, 03)									13
Welcome page (US-14)									2
Online brief (US-04, 06)									11
Draft save (US-05) · stretch									3
Signing (US-07, 08, 15)									16
Credit check (US-10, 11)									7
Access control (US-09)									5
CRM integration (US-12)									8
Reporting (US-13)									8
Studio report (US-21) · stretch									5
Milestones							UAT	M05	
Committed points	11	13	13	13	12	8			70

Navy = committed · gold = stretch. Sprint 5 (12) and Sprint 6 (8) leave room for stretch.

Forecast · as of Feb 16 · 78 points remaining

CASE	VELOCITY	BY MAY 11	WHAT IT MEANS
Low	11	66	4 committed points short; act at the Sprint 3 review
Expected	13	76	All 70 committed plus US-05; US-21 likely moves to Release 2
High	15	86	All 78 points, with room to spare

Confidence: Medium. Committed scope fits at expected pace, not at low. **If the low case comes true:** if the three-sprint average is under 12 at the Sprint 3 review (Mar 30), Marcus Reyes and Amy Price take options to the sponsor: Clearpath adds a consultant (inside the fixed price), or US-03 and US-13 ship simplified with the rest in Release 2 by change request. Go-live June 1 holds. **Re-forecast** after every sprint review in the Friday status report (burnup); formal re-plan at the Sprint 3 review.