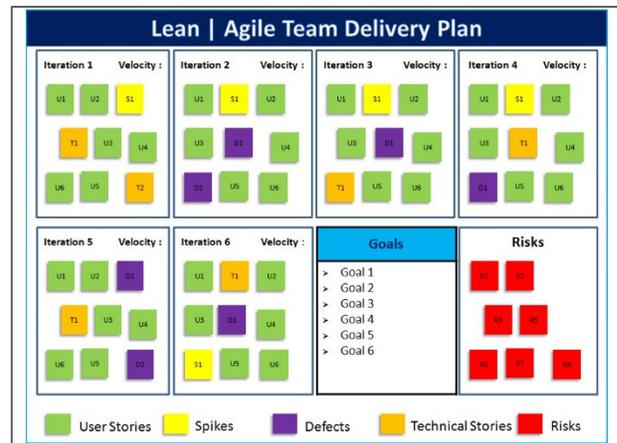


Helpful Hints for a Successful Program Increment (PI) Planning Event

This sheet provides valuable hints but isn't a comprehensive tutorial or a substitute for experience. Contact us if you would like an expert to guide you through the process.

General Guidelines

- Don't lose sight of the problem you are trying to solve (i.e., need for alignment). Use Scaled Agile website information (e.g., sample agenda) as a starting point. No "set in stone" rules.
- Use a PI Planning expert for the first 1 – 2 events (cost for each can easily be \$100k+, so not worth risking failure).
- Format to consider for first PI Planning event: 5 day "Get Sprinting" approach. Day 1 – 2: SAFe for Teams; Day 3 – 4: PI Planning; Day 5: PI Planning Contingency + Team Iteration Planning



Before the Event

- Vast majority of work: planning. Insufficient up-front work = painful PI Planning event.
- Some critical activities:
 - Create 1-page business case for executives. Expect to repeatedly sell the 'why' of PI Planning.
 - Form / evaluate / refine structure of each Agile team + Agile Release Train (ART).
 - Build, distribute team readiness checklist; conduct weekly progress reviews.
 - Customer, Product Management prep work facilitated by Release Train Engineer (RTE).
 - Minimum pre-event training: (a) Agile + Scrum 101; (b) SAFe for Teams.
 - Remove as many barriers to attendance as possible. For example, finalize dates at least 6 weeks in advance.

- Event facilitator must be “lights-out” good. If your RTE doesn’t have outstanding facilitation skills have them play supporting role.
- Remote staff? Identify tools (e.g., MURAL, Rentouch PI Planning App). Make sure to simulate realistic use of tools at least 10 days in advance.

During the Event

- If not all people are SAFe trained and you can’t mandate SAFe training, incorporate Just-In-Time (JIT) training into each part of the event.
- Mini-retrospective for each major segment of event. Don’t wait until end.



After the Event

- Distribute major outcomes (e.g., committed PI objectives, program board, key retro results) next business day after event.
- Remind attendees of “what now?” Provide 90-day calendar with major events like Scrum of Scrums (SoS), Product Owner (PO) Sync. Send calendar invites.
- Solicit additional named and anonymous feedback. Triage and add top items to a backlog.

Common Questions and Challenges

- How much is this going to cost?
- Are there any cases where doing PI Planning doesn’t make sense?
- What if we aren’t co-located? Is there still value? What do we need to do differently?
- We don’t want to show our ‘dirty laundry’ to our customers and business stakeholders. Is there a good reason they need to come?
- Do we need software to help manage the teams’ work during the PI? Which one?

Reference and Tools

- Scaled Agile PI Planning Guidelines: <https://www.scaledagileframework.com/pi-planning/>
- MURAL: <https://www.mural.co/>
- Rentouch PI Planning App: <https://piplanning.io/>