

Program Increment (PI) Team Readiness Checklist

This checklist helps confirm agile teams are ready for PI Planning. Contact us if you would like an expert to guide you through the process.

First PI Planning Event Only¹

- All team members receive (a) agile and Scrum 101, and (b) SAFe for Teams training.
- Team includes cross-functional members with all skills needed to define, build, test, and deploy business value.
- Scrum Master and Product Owner named and receive training specific to each role.
- Team members trained to use agile life cycle management tools (e.g., Integrated Development Environment [IDE], Jira, code repository, testing tools).
- Developers and testers confirm access to critical software and environments.
- Team reviews architectural standards and discusses questions with the system architects.
- RTE reviews minimum story and feature Definition of Done (DoD) standards with team and answers questions.
- Scrum Masters facilitate creation of team working agreements (reviewed and revised prior to subsequent PI Planning events).
- Scrum Masters facilitate creation of feature and story Definition of Ready (DoR) (reviewed and revised prior to subsequent PI Planning events).

Feature Readiness

- Product Management identifies and refines top X (e.g., 10) features. Number of features required depends on the size of the features, and should be sufficient to occupy the ART for at least a full PI.
- Team confirms each potential feature meets the Definition of Ready (DoR).
DoR examples: business value clearly stated, acceptance criteria defined, Non-Functional Requirements (NFRs) documented, diagram shows the business context, Subject Matter Experts (SMEs) and business testers identified.
- Product Management identifies known dependencies between features.

¹ Launching a new Agile Release Train (ART) involves many other steps. Contact us for support.

- Teams meets with Product Management to review the initial list of PI features and get questions answered at least 5 business days prior to PI Planning.
- Teams begin decomposing features into user stories.

Team and ART Cadence

- Calendar invites distributed for all team events (Sprint Planning, Daily Scrum, Sprint Review, Sprint Retrospective, and backlog refinement) for the whole PI.
- Calendar invites distributed for all ART events (Scrum of Scrums meeting, PO Sync, ART Sync, System Demo) for the whole PI.

Technology and Facilitator Readiness

- For remote events, create program board and team boards using an effective tool (e.g., MURAL)
- Team members trained to use PI Planning event technology at least 3 business days prior to the event (e.g., Zoom, MURAL, Miro).
- Setup team breakout rooms in advance if possible, or identify support staff to create rooms early on day 1 of the event.
- Identify dedicated technical support staff available throughout the event. Create a technical support room or separate meeting staff can join when they need help.
- Meet with everyone involved in facilitating the event to validate they understand their roles.
- Identify central location (e.g., SharePoint location, OneDrive folders) for event content.

Planning Event Content

- Nice to Have: Product management develops a 3 PI roadmap to review during the event
- Identify capacity allocation guardrails (e.g., new development, technical debt, defects, continuous improvement)
- Walkthrough agenda with senior leaders and key stakeholders at least 2 weeks prior to the event. Identify presenters for sections (e.g., business context, portfolio vision, architectural guidelines)
- Develop draft presentations at least 1 week prior to the event.
- Finalize and consolidate presentations at least 2 business days prior to the event.