



## What is PI Planning?

Program Increment (PI) Planning session is a time boxed event where Teams of an Agile Release Train that are united by a shared vision, meet and plan new features, discuss dependencies and risks. It is truly a cornerstone event for SAFe; without it SAFe cannot be implemented.

## How did the need for PI Planning start?

Large organizations may have hundreds or thousands of participants that may be spread amongst different teams. These teams may be working on something different than what you are working on. If planning was done in the presence of one team then you wouldn't know the possible effects your work can have on the other teams' work. Thus these dependencies need to be discussed and understood and there needs to be proper alignment so that all the teams are focused on one goal.

PI Planning helps brilliantly bring together all the members of the team under one room where all the dependencies and potential risks can be discussed. This creates a culture of increased visibility and to promote communication and clarity into what will be done.

## What is needed for the preparation of the PI Planning Session?

This is a large event. Where the participants alone of an Agile Release Train could be around 50-125. On top of that you also have stakeholders, business owners, users and other supporting individuals. So the preparations have to be done at a large scale. It is done under one large room. You need ample space where you can have chairs, tables, boards, sticky notes, stationary etc. If you have any team building activities planned, you need to arrange for them as well. You also need to arrange for snacks, drinks or meals for all the members.

## **Who are the participants of PI Planning?**

- All the teams of the Agile Release Train
- Scrum Masters
- Product Owners
- Developers
- Stakeholders
- Business owners
- Suppliers
- Users
- Customers

## **Who conducts the PI Planning session?**

The Release Train Engineer is at the front of facilitating the PI Planning session and ensures that a seamless and smooth PI session is done.

## **Who is the Release Train Engineer?**

A Release Train Engineer is truly the driver and the servant leader of the PI Planning session. They are at the front of ensuring seamless collaboration and alignment amongst the huge audience that attends the PI Planning session.

## **Why is Servant Leadership so important for the Release Train Engineer?**

Popularized by Robert Greenleaf, the concept of servant leadership explores evolving the mindset of an individual to become a better leader. For the servant leader, their main goal is to serve their teams in the best way possible. Supporting and encouraging the personal growth of the people that they are leading is kept a priority. The needs of the team come before the leaders themselves. These servant leaders are always there to guide their teams through difficult times. They are eager to help in identifying problems and to find a solution for them.

## **When is PI Planning held?**

A program increment lasts for about 8-12 weeks. Keeping this range in mind, PI Planning sessions are done quarterly. They are planned in advance and invitations are sent out before time as well so that all the preparations can be done timely.

## **What are the events of PI Planning and how long does PI Planning last?**

PI Planning lasts for 2 days. The events that take place are described below.

### **On Day 1**

- Business Context
- Product Solution Vision
- Architecture vision
- Planning context and lunch
- Draft Plans
- Review by management and problem solving

### **On Day 2**

- Planning adjustments
- Final Plan review and lunch
- Planning risks of the program
- Confidence Vote
- Rework if needed
- Retrospective

## **What are the Challenges of PI Planning?**

PI Planning does have its huge benefits but at the same time it can have some challenges. Some of them are listed below:

- PI Planning is long and can become boring at times so it is better to find creative and innovative ways to make it a little engaging.
- Trusting can be difficult and may appear as a challenge to them.
- Maintaining collaboration and synergy of multiple Agile Teams in the Agile Release Train, is vital towards achieving the objectives in the Program Increment.
- When doing the vote of the confidence, many people can feel pressured to vote.

## **What are the outcomes of PI Planning?**

There is no doubt that PI Planning is extremely beneficial and why it holds such high importance in SAFe. At the end of every PI Planning session, you have a prioritized and estimated list of features that need to be worked

on. There is better communication and improved working relationships are established amongst individuals along with alignment between all the teams and the external stakeholders. Dependencies and risks are identified which helps enhance cross team collaboration. All of the teams are aligned to a similar goal.

## **What is Distributed PI Planning?**

The coronavirus pandemic deeply affected work all over the world that forced many businesses to close. Fortunately tech companies were lucky to survive as they had the option to work from home. At first, the idea of having a PI Planning session may seem daunting. The most critical element of having all the teams in one place, physically, seemed impossible. The problem with large teams where its members are not just located in different cities, but in different countries, seem to pose a threat to conducting a PI Planning session.

In a situation where teams are not located in one location or can not be brought together, then Distributed PI Planning can be done. In order to make this happen, there are a few factors that have to be considered to make the PI Planning session as smooth and engaging as it can be.

- Try and bring the teams to one location as much as possible to one location.
- If the teams are spread across in different countries, then you need to make sure that the time zones are kept in mind and that the PI Planning session is done on a time that is suitable for everyone. The time for PI Planning should be kept in a way that it respects people and their culture and it does not affect their daily routine.
- The PI Planning can last for 2.5 or 3 days
- Use the latest communication, collaboration and ALM tools.

## **Why need a Pre and Post PI Planning session?**

Pre and Post PI sessions are needed because a single PI Planning session does not suffice to cover all the massive aspects of the work that needs to be done. When you are planning with hundreds or even thousands of people, you need to have proper alignment into all the aspects of what is being done. These Pre and Post PI Planning sessions provide a follow up and ensure a higher level of consistency, alignment and accuracy when working. It guarantees in building a consolidated plan for the Release Train to follow.

## **What is Pre PI Planning?**

Planning a Release Trains can be an enormous task. With hundreds of individuals involved it is necessary to perfectly align them and to manage the workload efficiently. In order to perfectly execute it, a pre-planning session is held among key members of cross-functional agile teams.

The Pre Planning session helps aligning the tasks to create realistic objectives by looking at the target milestone dates before executing a Program Increment planning session.

The progress of the previous Program Increment is reviewed and the current state is discussed. The business context and the vision are set. This creates a road map for the Program increments to come and their dependencies which is reviewed by the Solution and Program Management.

Respectively, the Agile teams or Agile Release Trains prepare their program backlogs that contain the features and then discussed.

A successful pre-planning session will achieve ranked features which are prioritized and set for each team of the release train. This list of features can be used for feature briefing, synchronization between product owners and product managers.

### **What is needed for a Pre Planning session?**

- Program Increment summary which has the progress from the previous Program Increment
- Business context, vision and milestone presentation
- Solution board with upcoming capabilities and features list
- The features of the next Program Increment that presents the backlog items, dependencies and risks

### **What is Post PI Planning?**

Post PI Planning session ensures that you have a finalized set of PI Objectives that have to be implemented, all the expected dates and milestones for delivering the final increment. These are mapped on to a physical or a Digital Solution Board.

The Release Train Engineer explains and discusses the objectives, dependencies, impediments and the risks of the PI. Risks are identified and mitigated, using the ROAM technique. If there are any aspects of the planning session that are left or not clearly understood, then a Rework Session is held to review the plan with the Agile Release Train.

### **What is needed for a Post PI Planning session?**

- Solution Roadmap
- Solution Vision

- Solution Backlog
- Milestone Definition

## **Participants of the Pre and Post PI Planning?**

The participants include the Release Train Engineer, Product Management and System Architect.

## **The need of having Inspect and Adapt**

It is a perfect opportunity to reflect on the mistakes made and how to make sure they are not made again. Indeed an integral part of SAFe, the backlog items are improved and are added which enhance velocity, quality and encourage continuous improvement and the reliability of the next Program Increment.