

# PI PLANNING ESSENCE ILLUSTRATED WITH “WHY”

## INPUT

### DAY 1

➤ **Business Context:** A senior executive/line-of-business owner presents the current state of business and solutions that address current customer needs

➤ **Product/Solution Vision:** Product Management presents the current program vision (typically top 10 upcoming features) and highlights any changes from the previous PI planning meeting, as well as any upcoming Milestones.

**Architecture Vision and Development Practices:** System Architect/Engineering presents the architecture vision. In addition, a senior development manager may present Agile-supportive changes to development practices, such as test automation, DevOps, CI and CD, which are being advanced in the upcoming PI.

➤ **Planning Context:** The Release Train Engineer presents the planning process and expected outcomes of the meeting.

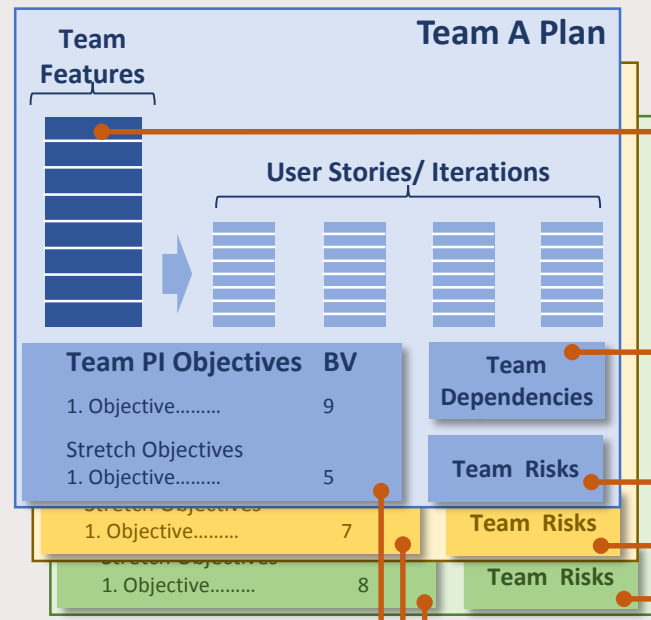
In essence, 1<sup>st</sup> Day of PI Planning teams create draft plan and review them; 2<sup>nd</sup> Day, they finalize team and program plans and commit to them. Two primary outputs of a successful PI Planning are committed PI Objectives and Program Board.

- Scrum of Scrum (SoS) is a weekly (more often, if needed) meeting of Release Train Engineer (RTE), Scrum Masters, and other appropriate participants, typically facilitated by RTE to coordinate dependencies of the ART (or ARTs) and provide visibility into PI progress and impediments, timeboxed 30 minutes.
- PO Sync is a weekly (often, if needed) meeting of Product Owners and Product Managers, typically facilitated by RTE or Product Manager to get visibility into the ART progress toward the program PI Objectives, discuss problems or opportunities with Features development, and assess any scope adjustments, timeboxed 30-60m.
- Both SoS and PO Sync meetings can be followed by a “meet-after” to solve any problems between concerned actors. SoS and PO Sync meetings can also be combined into one, often referred to as an ART Sync.

As per Scaled Agile Inc., “There is no magic in SAFe® . . . except maybe for PI Planning”, therefore, this illustration attempts to contribute towards explanation of the PI Planning event and beyond. SAFe® and Scaled Agile Framework are registered trademarks of Scaled Agile, Inc.



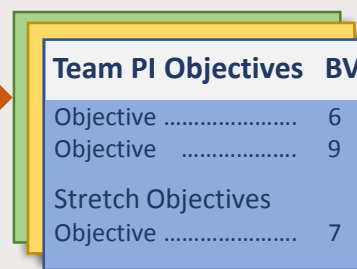
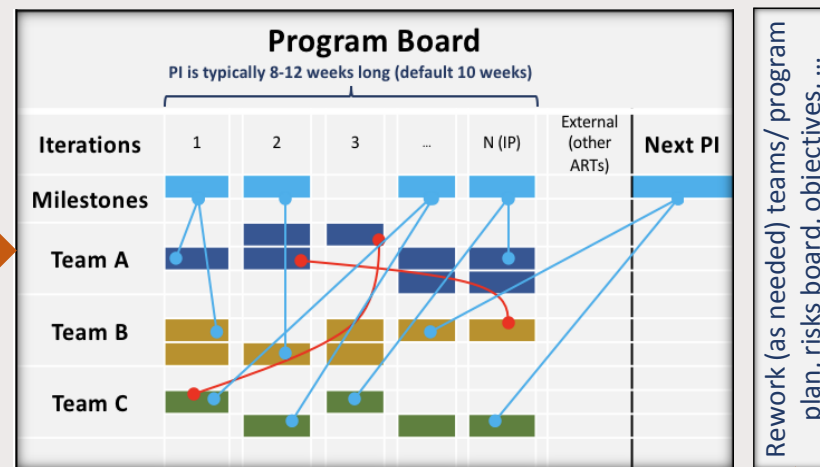
### DAY 1 & 2



PI Planning launches an ART (Agile Release Train), a long-lived, self-organizing, and cross-functional team of 5-12 Agile teams, each Agile team 5-10 people. Thus, an ART is a virtual organization of 50-125 people

**Breakout 1 (Day 1):** Teams draft their plan (team PI Board), assign Features and User Stories to Iterations (high level story points planning that will be worked out with details during each Sprint Planning), write initial team PI Objectives, estimate capacity (velocity) for each iteration, identify team risks, dependencies on other teams (User Stories, Features), external sources, or other ARTs, align Features delivery with Milestones, including if Features will be released in next PI.

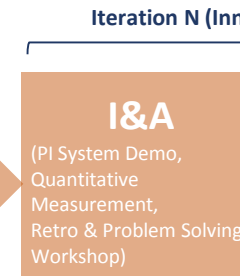
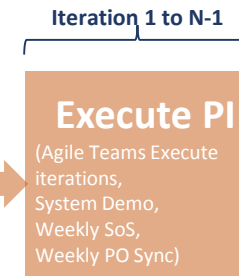
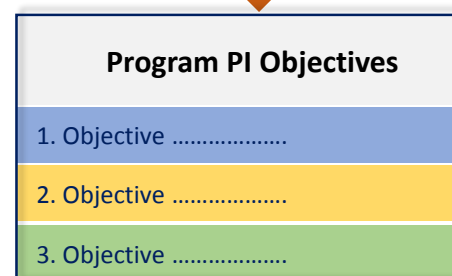
### DAY 1 & 2



**Breakout 2 (Day 2):** Teams make needed adjustments after Management Review, finalize their plans, team Objectives, and Business Values are assigned to the Objectives. **Confidence Vote:** Teams vote on their own team PI Objectives, which will be aggregated to the Program PI Objectives, and on all teams PI Objectives collectively. The latter one is more inclusive voting. If average vote is less than 3 fingers, rework takes place to address the concerns, therefore Confidence Vote can repeat.

## OUTPUT

### AFTER PI PLANNING EVENT

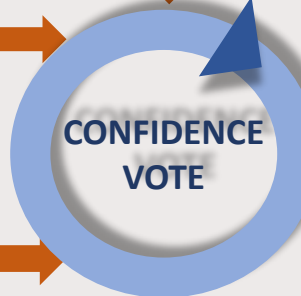


Improve next PI Planning Event

## OUTCOME

### WHY PI PLANNING?

- Commitment to an agreed set of Program Objectives in a face-to-face communication across all teams and stakeholders
- Aligning development to business goals with the Business Context, Vision, and Team and Program Objectives
- Identifying risks and dependencies, and accomplishing fast decision making
- Building a social network for accomplishing the ART success



Retrospective

Rework (as needed) teams/program plan, risks board, objectives, ...

IF AVG < 3 fingers, THEN

XOR

# Elucidation

## “There is no magic in SAFe® . . . except maybe for PI Planning”

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A fascinating intellectual capability of human mind is to conceptualize, visualize, and simplify complex processes. In doing so, it is essential to strike the right balance between details and essence, expressivity and simplicity, comprehensiveness and conciseness. These considerations guided the creation of the PI Planning schematics. Access the PI Planning Schematics here: <http://www.InstituteEngMgt.com/wp-content/uploads/PIPlanning.pdf>

Coaching and observing implementation of SAFe in companies, I have witnessed how often new teams struggle to grasp the purpose, activities, and flow of PI Planning. Likewise, although RTEs are trained in PI Planning, they still need a quick reference whether for executing PI Planning, onboarding new teams, or simply presenting the planning context in a richer interrelation of artifacts, and start to end process as per these few features that I adapted for the PI Planning schematics:

- Colors are used to enhance readability and visibility of activities flow. For example, the Program Board has colored Features that correspond to the color of Features owned by different teams. In a similar fashion, PI Objectives and Program Risk board are aligned between teams and program levels. Note: Features also include Enablers as per requirements of Architectural Runway and recommendation of Systems Teams. Enablers are critical to get Enterprise or System Architecture ready for implementing future Features.
- The “Confidence Vote” can repeat if the average confidence is less than 3 fingers. Therefore, it has exclusive OR outcome: Normally proceeding to Retrospective; in case of low confidence, leading to reworking to achieve acceptable confidence level.
- The schematics goes beyond the PI Planning event by closing the loop and capturing the cyclic nature of PI and PI Planning.
- Side notes directly on the schematics page reinforces understanding the sequence and purpose of each activity and provide essential explanation in one page.
- Inclusion of information such as ART size, PI duration, team size, etc., make this one sheet a mini deck of flashcards.
- Symmetric layout of graphical elements and arrows reduces cognitive load and enhances retention.
- Like the SAFe framework as a whole, PI Planning is not a straightjacket that has to be forced on the teams or SAFe Enterprises. While preserving the principles, core values, and purpose of the SAFe, the implementation itself might slightly vary in different contexts:
  - Some SAFe Enterprises might have advanced DevOps practice with either instantaneous or near instantaneous release while some might have weekly, monthly, or quarterly releases, where some completed Features might be released only in the next PI;
  - In some SAFe Enterprises, prior to the PI Planning event, teams are nominated with Features so they head start working on their user stories and story estimation, capacity (velocity) estimation for each iteration, dependencies, etc;
  - The above should not be confused with Pre- and Post-PI planning events used in the case of multiple Agile Release Trains and Suppliers in a Solution Train.
- Team Plans (Team Boards), Objectives, and Risks as well as the Program Board are developed iteratively in rounds of breakouts over recommended 2 days.
- While most SAFe Enterprises conduct a 2-day PI Planning, others may take 1 day, 1.5 day, or 2.5 days, depending on teams’ geographic distribution, SAFe experience, preparedness, and ART size.
- The developed schematics emerged over numerous PI Planning conducted by the author to most accurately depict the essence of PI Planning.
- It is important to note that this is not a replica of the “Standard two-day PI Planning agenda”, and one should not expect a one-to-one correspondence between the two.