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Point of View

How to Plan the Remote Program Increment Planning Event?

by **Vaidehi Indulkar**



- ✔ Have you recently adopted SAFe®¹ (Scaled Agile Framework) for business agility and not sure if you can conduct PI Planning (Program Increment Planning) as a 'Big Room' event during pandemic?
- ✔ Do you have teams, who contribute to same Agile Release Train, are distributed across the geography and wondering how to conduct PI Planning in remote way of working?

Effective PI (Program Increment) Planning is the need of an enterprise to predict & offer efficient and innovative solutions to their clients and end customers, continuously. Pandemic is pushing enterprises to embrace new and agile ways of solving these challenges even in remote way of working.

As experienced, absence of effective, scalable and end-to-end agile requirement gathering process has been a showstopper for delivering expected incremental business outcome. Program Increment Planning, or [PI Planning](#)² event of SAFe®, addresses this by connecting all team members and stakeholders including senior business leaders, for effective and efficient way of information conveying and requirement planning.

Scaled Agile Framework – SAFe®:

It has a structured approach of applying Lean and Agile Practices and Principles that are designed to span across all layers of the enterprise. Built on core values, guiding principles and processes, SAFe® helps foster enterprise, team and technical agility to achieve maximized business outcome. PI Planning is a key event of SAFe®.

What is PI planning?

PI planning is a key event of SAFe® with defined cadence and plays a major role in incremental value delivery of an Agile Release Train. It is a structured event that demands detailed

1. Scaled Agile Framework SAFe® : <https://www.scaledagileframework.com/>

2. PI Planning – Program Increment Planning : <https://www.scaledagileframework.com/pi-planning/>

preparation and participation by all stakeholders of the ART (Agile Release Train), who, before pandemic, used to meet in a big-room event, to discuss and align requirements. It establishes alignment of vision & strategic roadmap across all the layers of the enterprise. PI objectives and iteration goals are the short-term commitments that are visible across the layers. This transparency builds trust and fosters integrity, which is essential for business agility. This event plays a key role in defining and realizing a lean product.

Set the ground

Deliberate and planned efforts are required to collaborate and arrive on the common ground in a remote way of working. Frequent sync-up meetings of key stakeholders like business owners, product management team, system & solution architects to get clarity on the enterprise vision and arrive on near term goal that is essential to start with. Additionally, retrospection to understand existing challenges, if any, would help to a great extent. Check out the list before you bootstrap.

Quick checklist:

Pre-requisite: Agile Release Train (ART) & Key Roles are established around the Value Stream

- Empathized with customers, identified their need, ideated & arrived on agreeable solution?
- Identified stakeholders external to ART and considered Cross-ART requirements?
- Productized the Vision that is implementable and achievable?
- Created product backlog and captured business prioritization of Epics?
- Prioritized product backlog using MoSCoW³ and established alignment of Business and IT?
- Identified scope of PI, based on high level estimates and available capacity?
- Identified PI Ambassador who can take responsibility to sync-up activities and co-ordinate?

3. MoSCoW – Prioritization technique for Features by identifying and evaluating Must Have, Should have, Could have and Would like to have / Won't have

Bootstrap for remote PI planning

Few early steps will ease the pressure during the remote event, and you will enjoy connecting with entire Agile Release Train in a virtual big-room event with facts and figures. Prepare a well-groomed, in-scope Product backlog with features, capabilities, enablers, and make it visible using Agile Tools like Azure DevOps or JIRA. This will increase confidence of the ART teams. You can then focus on nitty-gritties of event planning.

Tips for better event planning

- Coach stakeholders on PI Planning events, their roles and responsibilities during the event, deliverables & expected outcome of the event.
- Finalize and publish dates & agenda of PI Planning Event based on availability & existing and/or upcoming milestones.
- Ensure effective usage of overlapping time-zones in distributed set up.
- Content-readiness of key presentations like business context, product & architectural roadmap.
- Logistics readiness – Identifying & setting up collaboration tools like MS Teams, Web-Ex, Zoom etc.
- Set aside time for PI Retrospection. It is something not to miss.

Keeping a “Plan B” ready

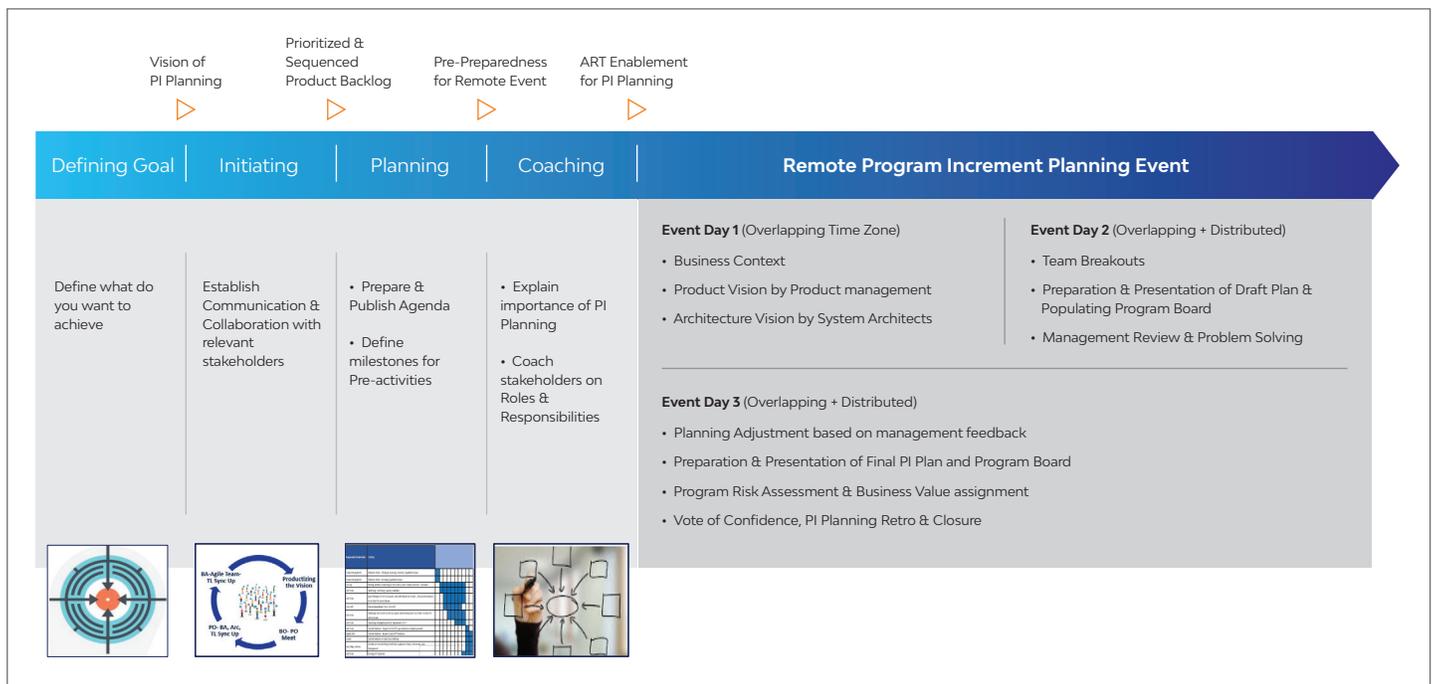
Consider all possible impediments during the event and be ready for extra day in case of spill-over. Remember you have to manage anything and everything without leaving your place.

Checklist for fall back plan

- Connectivity issues:
 - Maintain alternate connectivity option
 - Share content with chosen, key stakeholders so that they can support you
- Keep buffer time to accommodate technical goof-ups.
- Follow timeboxing but also be empathetic.
- Ensure stable connectivity for key stakeholders like business owners, product owners, architects, RTE, coaches with Agile Teams.
- Create virtual break-outs with Agile Teams.
- Ensure that there is ready help for those who may need it.

Interim milestones and the event agenda

Here is a quick view of roadmap and interim milestones based on the checkpoints mentioned earlier. Snapshot of day-wise agenda of PI Planning Event is as prescribed by SAFe®.



What next? Determine the focus of PI execution

- ✓ Ensure transparency
- ✓ Provide solutions to resolve impediments
- ✓ Monitor and track the program board and risks 'ROAM'ed⁴ for interdependencies flow
- ✓ Demonstrate working software early and often via demos and get feedback from stakeholders
- ✓ Establish agreed metrics and processes to monitor and analyze
- ✓ Stay focused on goals, analyze deviations and take corrective measures

Is the PI Planning successful?

Were you able to show 'Working Software' at the end of the sprint? How flexible & comfortable your team was while adopting changes? Did you use 'Polly' or any such tool or run thro' votes to check Happiness Index of your teams? If your answer is 'Yess'... then you have done it!

You cannot measure what you cannot define. Along with metrics, Agile focuses on unique measures like working software, emotional coefficient.

- ✓ System demos reflecting value as planned or close to that planned (business value allocated by business owners)
- ✓ Feel the sense of ownership within the Teams
- ✓ PI execution retrospection prepares for the next PI planning event and the PI itself
- ✓ Happiness index is high :-)

4. **ROAM** - Risk ROAMing is assessment of Risk and assigning status to track. **R**esolved, **O**wned, **A**ccepted & **M**itigated

Case in Point:

Orchestrating first PI Planning for an ART of 10 + scrum teams with 120+ people, remotely, for one of the leading manufacturer of elevators was an fulfilling experience. Carving out each task, preparing and following checklist shared in this article, helped us streamlining and gave us the confidence. 100% participation of stakeholders and overwhelming response of our client partners made the event successful. Agile coach wore an additional hat of PI Ambassador before and during the PI Planning event.

Getting into the role of PI Ambassador helped planning & orchestrating the entire process in a defined cadence. Coaching & enabling stakeholders for their desired contribution in PI Planning, and ensuring readiness beforehand, helped us achieve the goal. Initiating early planning by each team and focusing on dependency discussions during the event, worked well.

In a nutshell

The entire Agile Release Train, when participates in such an event, elevates with a mature alignment, not only with user stories and features but also with the vision to be achieved as a team. Synergies created during interactions, even if they are remote, foster a bonding for purpose. Experiential learning takes further step towards maturity. PI Retrospection speaks about the experience and learning. Suggestions for improvement display mindset growing towards agility. The intricacies of the event may vary for enterprises, programs within the same enterprise and as per current momentum. However, adaptability is key to success.

Author Profile



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With an experience of over 4 years in SAFe Process Consulting, Coaching & implementing, Vaidehi has been closely associated with a leading manufacturing firm for SAFe implementation in IIoT-based solution. She is passionate about helping organizations create a transparent & trust-enabled environment to maximize value, improve quality and flow by effective implementation of Agile & Lean processes.

Vaidehi has more than 15 years of experience in IT industry, and has been instrumental as Digital & Process Transformation Consultant in various domains like Banking & Finance, Insurance, Manufacturing. She is Certified SAFe Program Consultant - SPC 5.1 and holds EMBA in IT Operation Management.

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