

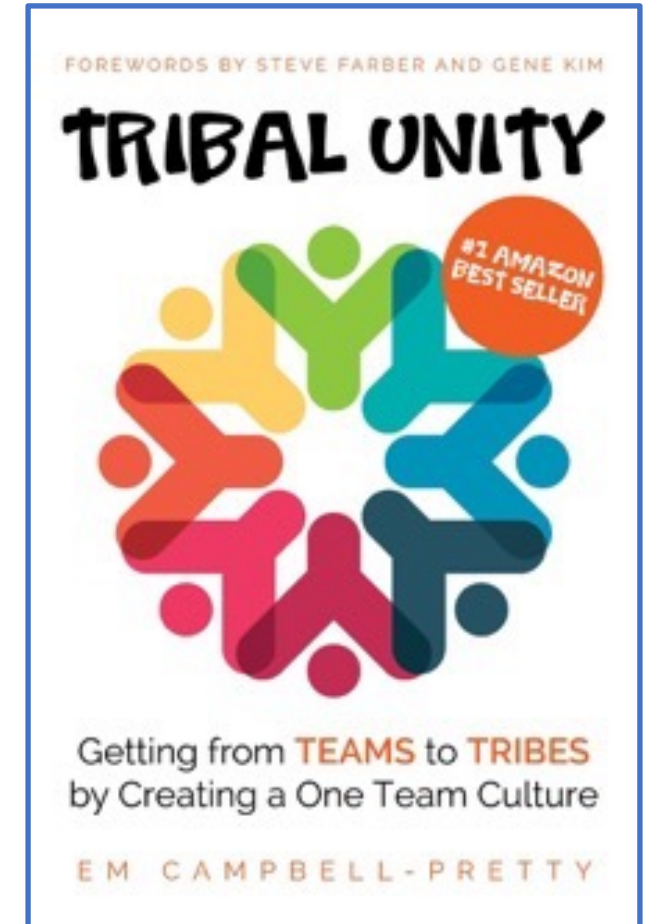
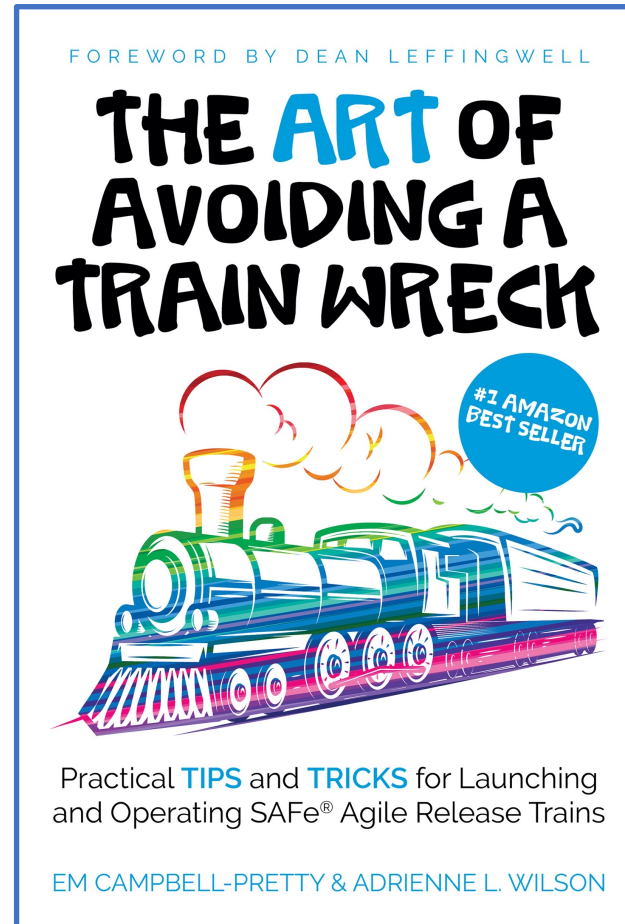
# A Scrum Master's Guide to a successful PI Planning



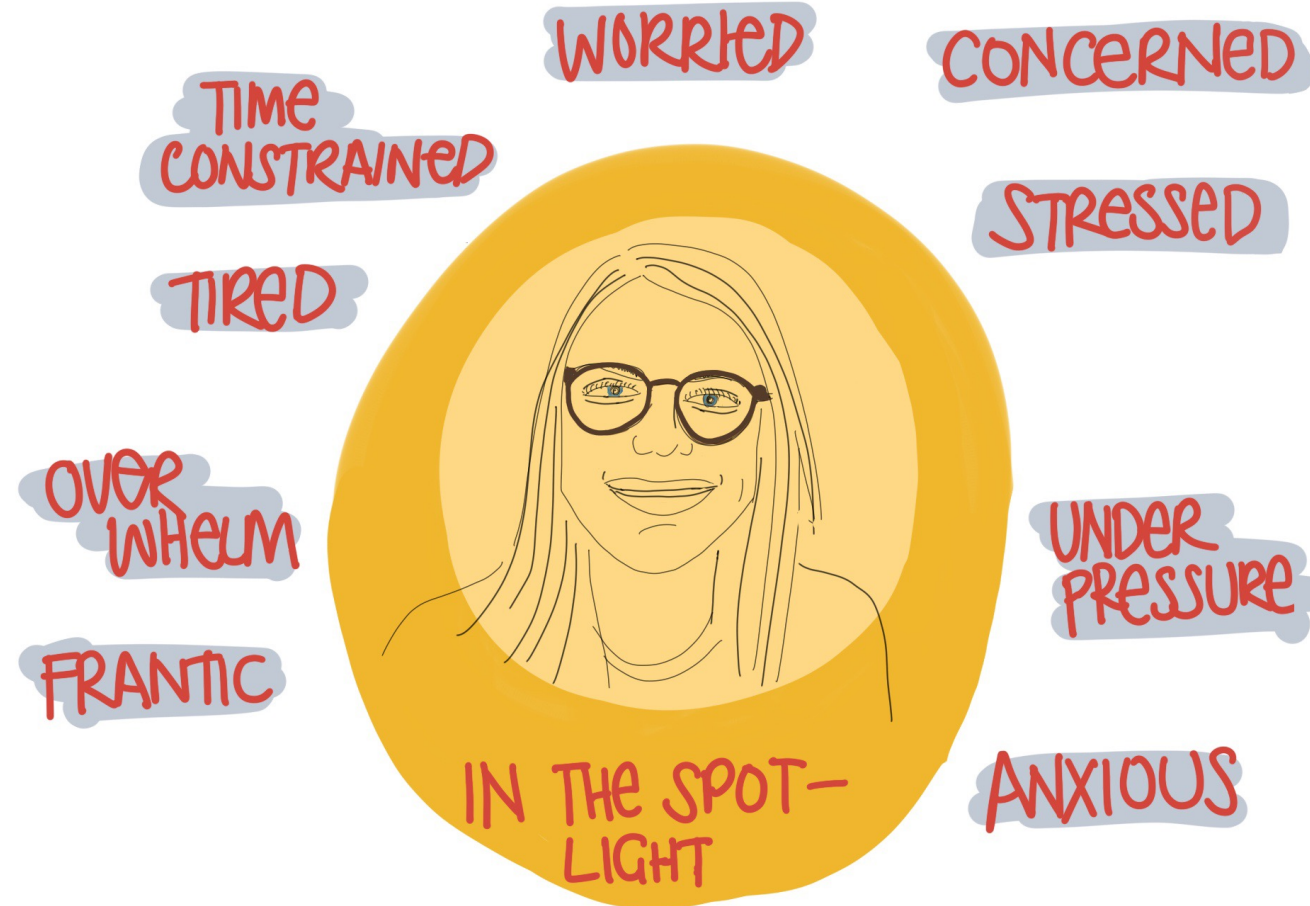
# Who are we?



A CULTURE FIRST APPROACH TO BUSINESS AGILITY



# HOW SCRUM MASTERS MAY FEEL ABOUT PI PLANNING



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# SCRUM MASTER'S GUIDE TO A SUCCESSFUL PI PLANNING EVENT

FEATURE PRIORITIES  
CHANGES TO DOD

**SYNC WITH RTE**

SMES INVITED  
MILESTONES

HOW MUCH OF TIMEBOX?  
WHO ELSE DO WE NEED?  
HOW MANY FEATURES & THEIR PRIORITIES?

CAPACITY ALLOCATION  
Tech TEST & PLAN FOR PIP  
TOOLING FOR EVENT  
THEME FOR EVENT

- MS TEAMS
- ZOOM
- SHARPIES
- MURAL
- MIRO
- POST ITS

## CREATE A FACILITATION PLAN FOR DAY 1

LEARNING & IMPROVEMENTS

PREPARE BY REFLECTING ON LAST PI PLANNING



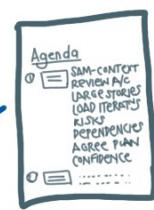
HOW WILL WE AGREE DEPENDENCIES?

SCRUM OF SCRUMS

PLANNING POKER CARDS/APP

TOOLS - PHYSICAL/ELECTRONIC?

WILL WE STOP FOR MEALS? WILL WE WORK THROUGH?



WHAT ARE YOUR BIGGEST CONCERNS FOR PI PLANNING?

ASK THE TEAM

HAVE FEATURE DISCOVERY ACCESSIBLE

WIREFRAMES

OUTSTANDING QUESTIONS

ACCEPTANCE CRITERIA

SOLUTION ON A PAGE

SUBJECT MATTER EXPERTS



ASK - WHERE IS THE GOLD IN THIS FEATURE?

HELP THE TEAM FOCUS ON VALUE

HOW WILL WE POSITION VALUE TO BUSINESS OWNERS?

ITERATION DATES

UNDERSTAND TEAM CAPACITY

AVERAGE & ADJUSTED CAPACITY

ANY TEAM CHANGES

PLANNED LEAVE

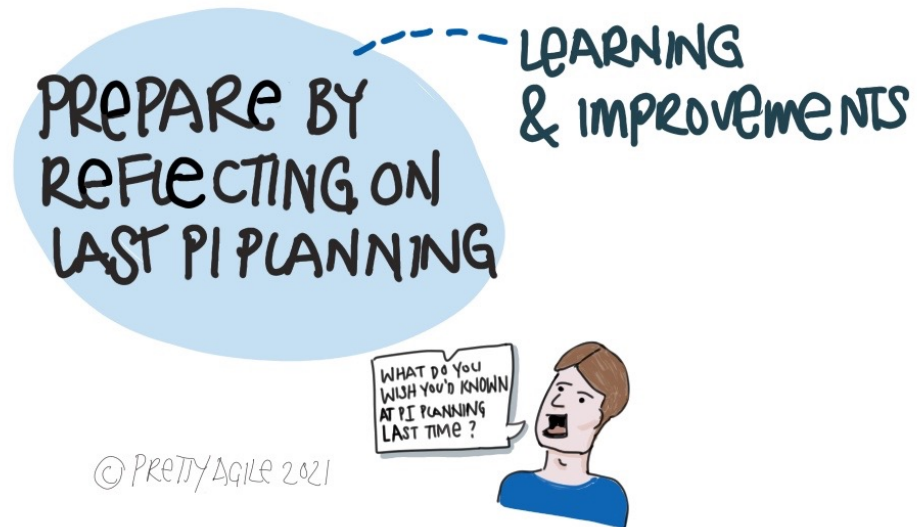
PUBLIC HOLIDAYS

CONFERENCES

SOS

HELP  
TRANSPARENCY

# Reflect on last PI Planning



Agile Release Trains are continually running delivery vehicles, so you can be confident you'll be back at PI planning soon.

In iteration 1 we encourage Scrum Masters to run a Retro on Last PI Planning (i.e. 2 weeks ago) to capture learnings and improvements for next time.

An example priming question is “Given what you know now, what do you wish you'd known at PI planning?”

# Example Team Level Retro on PI Planning

## LIKED

Pair Programming is good!!	New team is awesome
No laptop rule is good	Stakeholder super understanding
Dependencies are being called out earlier	Good energy

## LACKED

When will TD be ready for everyday use?????	Rethink Program Risk readout
Some dependencies still not called out (knowledge transfer)	Final plan review is tooooooo long
Solution to be finalized/discussed before planning	

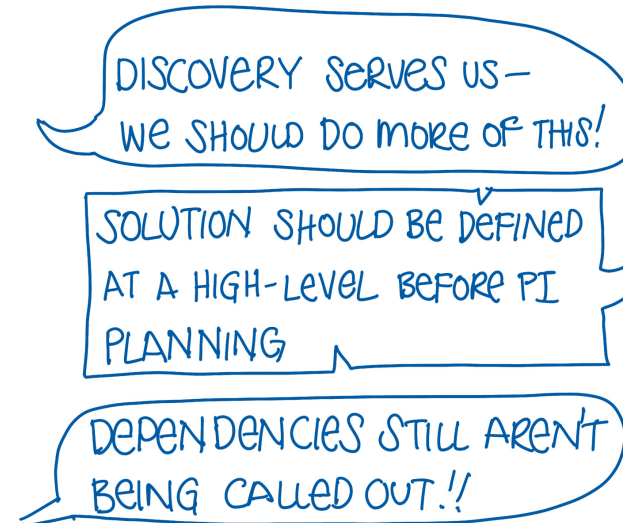
## LEARNT

Learnt some new things about <domain> data - some good/some bad	More discovery
Preparation for PIP was good	

## LOVED

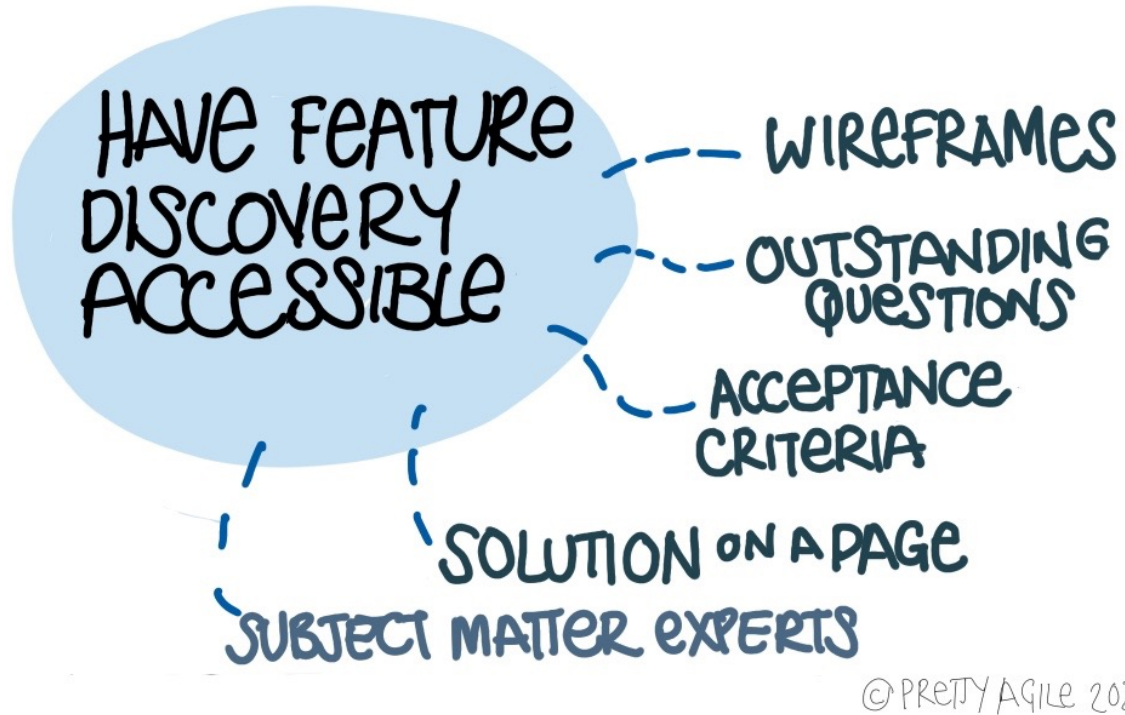
Train is coming together as team	Leadership team feedback has been very useful	Great support from <team>
Finally getting some realization that work is needed on xyz platform	Good collaboration within the team!	Very helpful and pragmatic stakeholder
Teams ready to mitigate dependencies		

What can you expect from a Retro on this topic?





# Feature Discovery



SAFe refers to Continuous Exploration, at Pretty Agile we describe the team involvement in this as “Discovery” which will often be documented in pictures, light-weight documents.

As a Scrum Master make sure you have these items available to the team at PI planning.

If you’re face-to-face you will want to have physical copies as people getting ‘lost’ in their laptops tends to kill collaboration ;-)

**Note:** any Acceptance Criteria at the Feature level should be confirmed with the Product Manager (as they accept features).

# What is Feature Discovery?

**Purpose:** gain alignment on this (potential) future piece of work and give a high-level size.

**Approach:** SME & Agile Team Discuss in Workshop with at least one person capturing information (visibly)

What are the things we know?

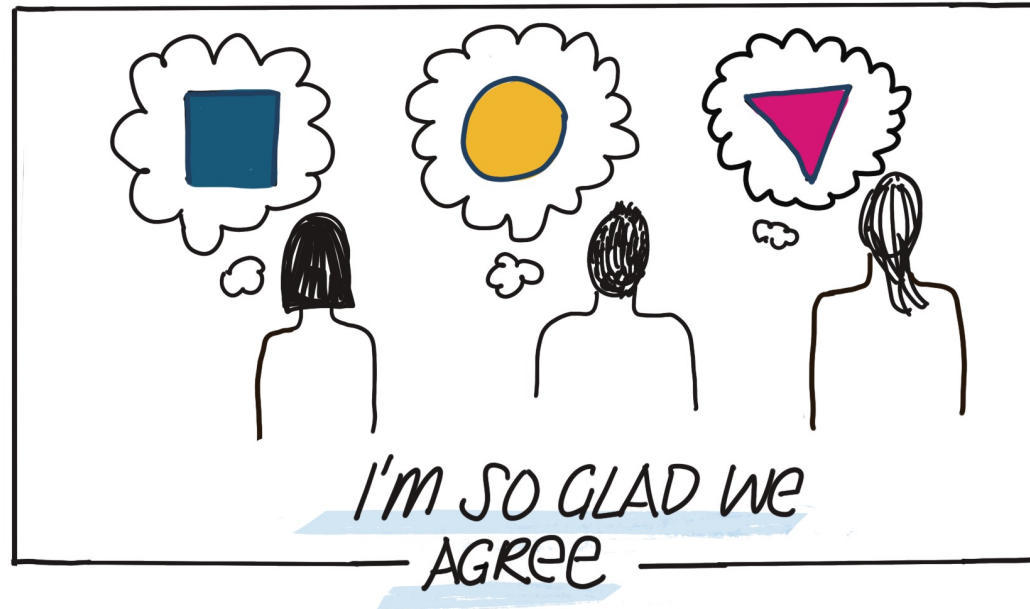
What is the Customer Problem?

What are the things we need to know?

Also, architectural impact and which systems/how much etc.



In Feature Discovery as well as in PI planning....



*The importance of visualisation.*  
★ Draw a picture, visualise notes,  
visualise actions for faster  
alignment.

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# Where's the gold?

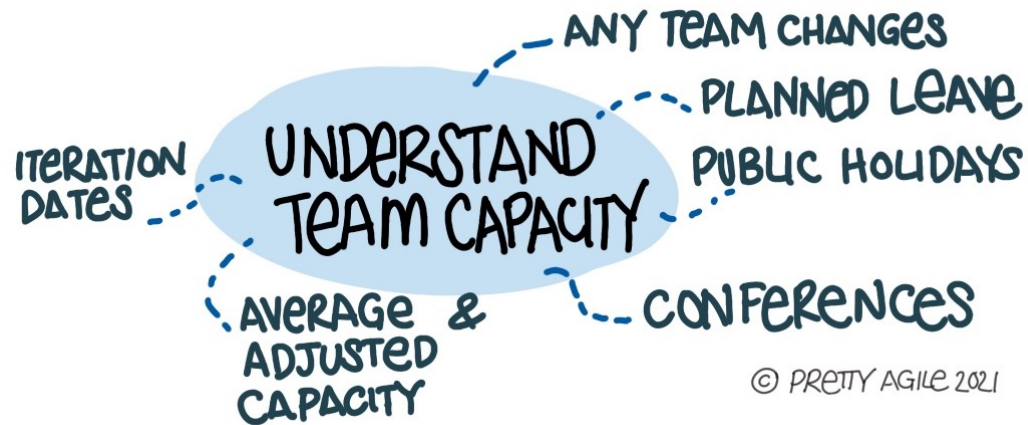


As a Scrum Master at PI planning, you may see the team understand the feature to be overwhelmingly large.

At these times, asking an orienting-question may help, such as “Where is the **GOLD** in this feature?” or “If we could deliver just one thing in this feature, what would be most valuable to the customer”?

**Turn Up The Good** pattern is to ask these questions with the Customer (or empowered Customer Representative) and the whole team to build alignment and shared understanding.

# Understand Team Capacity



PI Planning matches Demand with Capacity.

So, we need to understand team capacity.

- SAFe guidance to get new teams started, or historical velocity for existing teams
- Know the iteration dates, look at public holidays for the local area of team members
- Are there any team changes? If so, apply 'new team' adjustment to capacity
- Ask team members if they have planned or proposed leave, conferences, training etc.

**Turn Up The Good** – whole train estimates capacity mid-PI for the next PI to start setting expectations with Product Management and stakeholders.  
If not, understand team capacity at least the week before PI planning.

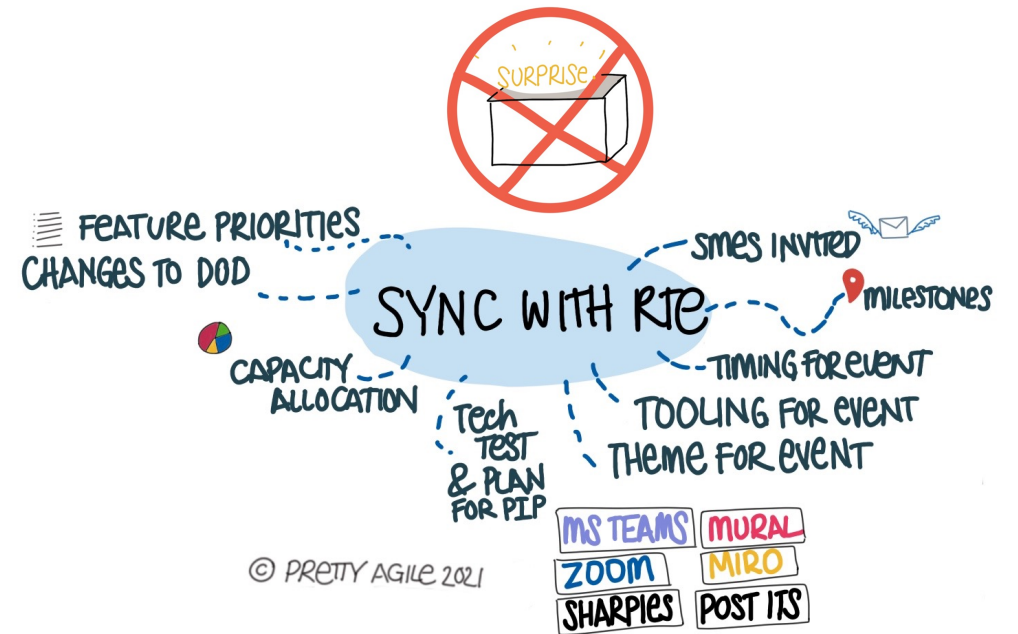
# Sync with RTE/Trifecta

Your team is part of a Team of Teams, so let's all align!

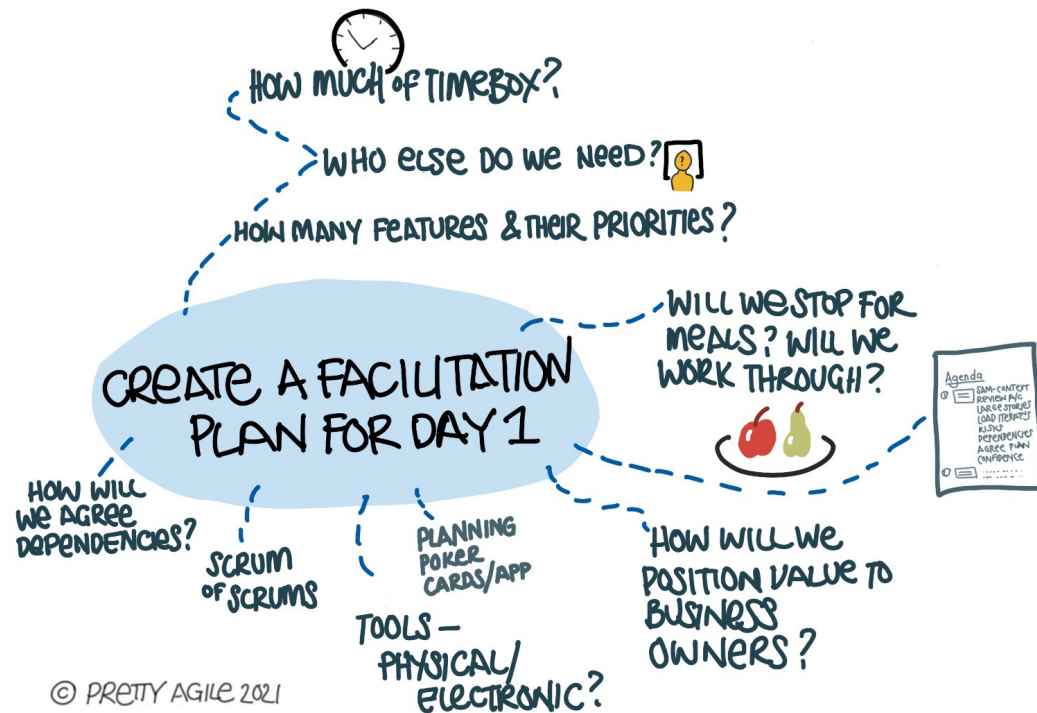
Scrum Masters and Release Train Engineer (and ideally the whole Trifecta) need to meet before PI planning to discuss readiness and any information pertinent to Scrum Masters.

Be proactive in this sync – the Release Train Engineer will likely appreciate your input from a team perspective.

**Turn Up The Good** If you have time, your RTE likely needs your help to prepare for PIP!



# Facilitation Plan for Day 1

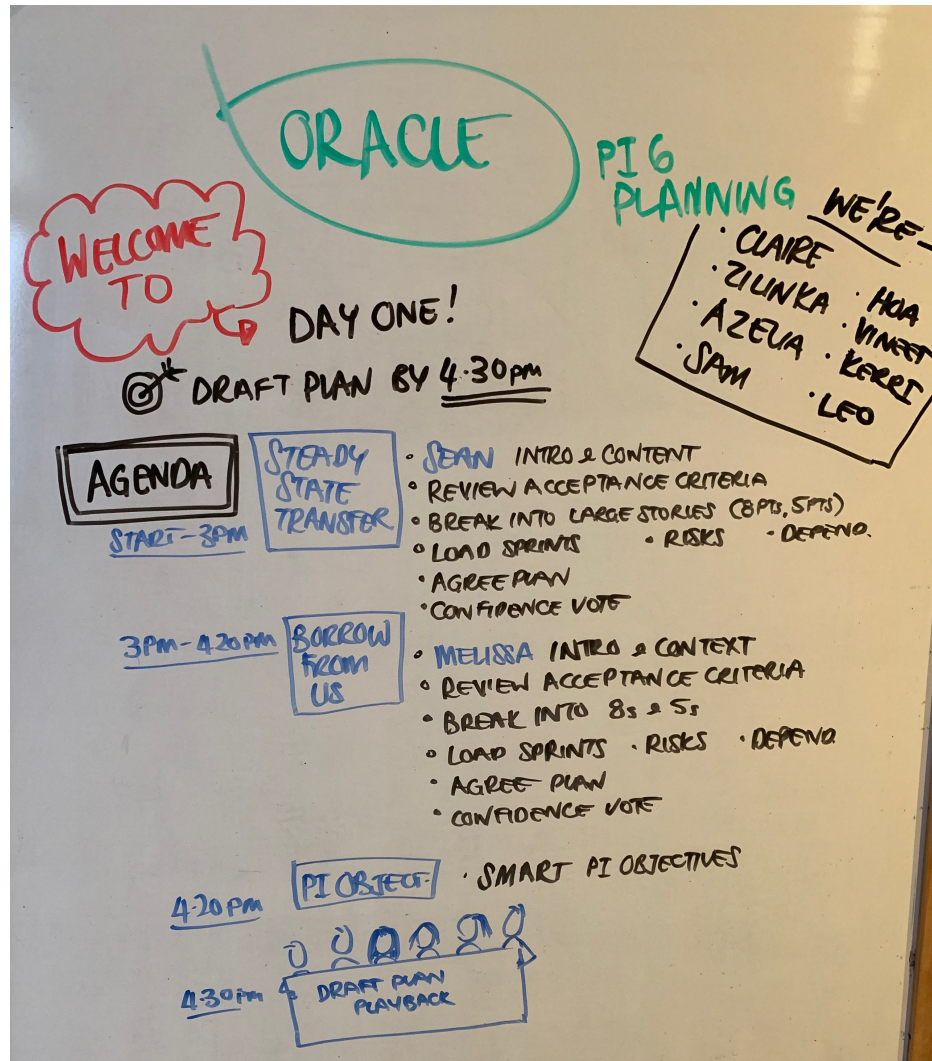


While RTE facilitates the whole PI Planning Event, you facilitate your team planning. Let's prepare for that.

- How many features/enablers do you have?
- Do we need help from anyone else?
- How much of timebox? (look to size to guide you)
- Planning poker cards for story sizing
- Agree a plan with your team around meals
- Which features/enablers might be more difficult to explain to Business Owners – get help
- Agree a plan with your team for dependencies
- Agree a plan with your team for SOS
- Work out a plan if anyone is expected to miss PIP



# Facilitation Plan for Day 1



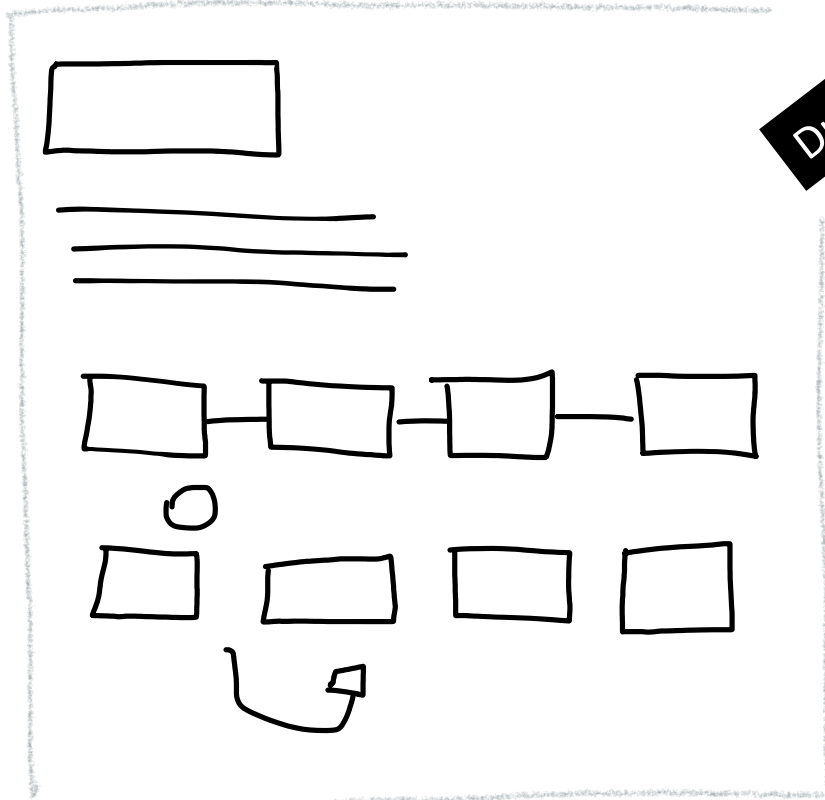
This is an example of how your facilitation plan might look at face-to-face PI Planning

**Turn Up The Good:** Don't keep it a secret, visualize it!

**During PIP**

Reassure the team that you won't know everything upfront, it's OK. Make some educated guesses right now and ensure it's good enough to move on for now. Things will change and that will be OK.

# Facilitation Plan for Day 1



During PIP

Start with highest priority feature

What is the business/customer problem we're trying to solve?

**Draw a picture** to invite people into the conversation

Ask - How will we solve this?

Ask - What is the work?

Size the work

Capture 'acceptance criteria'/ thoughts

# During PI Planning



**Save our Souls;** don't be afraid to ask for help.

**Scrum of Scrums;** this is an opportunity to bring your head up out of the weeds. Offer hyper-transparency to the RTE and accept help when you need it.

# Ask the team

WHAT ARE YOUR  
BIGGEST CONCERNS  
FOR PI PLANNING?

ASK THE TEAM

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Preparation

Don't forget, it's the team who do the planning.

Ask them what they need – so you can help!

During PIP

During PI planning – check in. How are we going?

On day 2 – start asking for a fist of 5 confidence and as a team address low confidence