

Purpose and Agenda

Purpose

"At regular intervals, the team reflects on how to become more effective, then tunes and adjusts its behavior accordingly." - Agile Manifesto

This quote underscores how crucial it is for organizations to continually improve. Just as Agile teams are encouraged to hold team retrospectives at the end of each iteration, Agile release trains (ARTs) should hold an I&A event at the end of each planning interval (PI). This event has three important parts:

1. A PI system demo, which demonstrates the current state of the solution
2. Quantitative and qualitative evaluation of the current state of the solution
3. A retrospective and problem-solving workshop

I&A Sample Agenda

The I&A should occur at the end of each PI. Whenever possible, the I&A should include everyone involved in building the solution: Agile teams, the release train engineer (RTE), system and solution architects, product managers and product owners, scrum masters or team coaches, and business owners.

[5 minutes] **Welcome all participants**

Remind everyone of the purpose of this event and give them a brief overview of the agenda.

[60 minutes] **PI system demo**

The I&A starts with a PI system demo to present the current state of the solution. This demo is intended to show all the features that the ART has developed in the PI. This demo also tends to be more formal than the demos that happen after each iteration, and some extra preparation is often required. Although there are some differences between this and other system demos, it should be timeboxed to an hour or less to keep everyone engaged.

PRACTICE TIP

Ask the product manager, product owner or system architect to set the context for the demo, specifically the problem statement and how the feature or solution supports strategy. Setting the business problem context and framing the demo within the strategy context is an opportunity to connect the ART to customers, and connect strategy to execution.

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[20–45 minutes] **Quantitative and qualitative evaluation**

Next is a collective review of any metrics the ART has agreed to track, and a discussion of the data and trends. The RTE and/or solution train engineer (STE) are typically responsible for gathering and presenting this information to the ART. The metrics that ARTs decide to track vary widely. One that SAFe strongly recommends is the ART predictability measure. This is gathered by rolling up each team's planned vs. actual business value. Reliable trains should operate in the 80-100 percent range, as this allows the business and its stakeholders to plan most effectively.

PRACTICE TIP

When reviewing metrics, help the ART understand the "why" behind the metrics. Why do we capture this metric? Why do we care about it? What does the metric mean, and how should people interpret the results? All too often, metrics are presented but not explained, and the ART does not always understand why a metric is important nor what to do with the metrics' results or trends.

[90 minutes or more, if needed] **Retrospective and problem-solving workshop**

[20–30 minutes] Retrospective: Teams should conduct a brief retrospective (30 minutes or less) to reflect on and surface the issues they would like to address during the problem-solving workshop. There is no one way to do this; many different Agile retrospective formats can be used.

[60 or more minutes] Problem-solving workshop: The problem-solving workshop helps address systemic issues using the structured root cause analysis format. This consists of agreeing on the problem to solve, performing a root cause analysis, identifying the biggest root cause, restating the new problem, brainstorming solutions, and then generating improvement items to add to the backlog.

PRACTICE TIP

Remind the ART that you are trying to understand ART-level problems, which requires systems thinking. The RTE can get to this with a strong, prompt question.

Preparation Checklist

Facilitator preparation for the I&A is significant and may start weeks in advance of the end of the PI. The RTE and/or the STE are usually responsible for scheduling and preparing for this event, though they may involve product management, scrum masters or team coaches, engineering, and others.

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Schedule the I&A event far in advance. This is an important event for the entire ART, and it has a significant timebox. Scheduling well in advance ensures that everyone can participate reliably.

Decide if your I&A will be held in person or as a remote event, and plan how you will set up the room and/or remote meeting platform. If the I&A is across multiple office locations, consider having an onsite facilitator at each location.

Ensure you have planned technology support to present slides, demos, videos, or other artifacts to the ART. You may need a designated support person to ensure that any screens or sound system are working as needed.

Work with the business owners to schedule meetings with each Agile team so they can score the actual business value achieved by each team. This must be completed for each team on the ART before the I&A in order to roll up the ART's business value in the quantitative and qualitative evaluation portion of the event.

Work with the teams, product management, system and solution architects, engineering, and other key contributors to plan and prepare the PI system demo.

Identify and designate facilitators and scrum masters or team coaches for each team or small group who will complete the retrospective and problem-solving workshop.

Plan for how the ART will take improvement items into the backlog, how they will identify owners and collaborators to work on them, and share progress or changes with the ART as these items are considered.

Tips and Tricks

At the beginning of the new PI, work to schedule the I&A and the next PI planning event so everyone in the ART has these events on their calendars well in advance.

If you are holding the I&A in person, consider how you will have teams or groups come together in the room. You could designate team tables or break participants into groups.

If you are holding a remote I&A, ensure that your video platform can easily break teams and small groups into virtual breakout rooms. You may also need a way to check in with facilitators or call groups back.

If you are holding a distributed I&A, keep time zones in mind and ask the ART to “share the pain” of adjusting for different time zones.

Do a dry run with all presenters and facilitators to make sure that your in-person or remote set-up will work and that transitions flow smoothly between different parts of the I&A event.

Add short breaks for the ART into your agenda—this is a long event, and you want people to remain engaged.

Using the Meeting Creatively

- Although Agile teams can retrospect and problem-solve together, there is also value in having anyone from the ART pick a problem statement they are interested in. Giving people the opportunity to sign up for or move to the problem that interests them creates engagement and gives them the chance to collaborate and share perspectives with new faces.
- There are many variations possible in delivering a PI system demo. Consider having each team make a short video, create visuals of the value they delivered, or work with scrum masters or team coaches for each team to create their own short demo. This can energize the PI system demo.
- Consider using a creative or fun retrospective format to add a new element to your I&A event.
- Use quick polls and quizzes to offer incentive to pay attention and share responses.

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Let's face it; not everything goes perfectly all the time. In a fast-paced business environment, change is the only constant. It can be difficult to move your team forward when disagreements or conflicts occur. Below are some common areas where scrum masters or team coaches can succeed in the face of adversity.

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POTENTIAL ISSUES

Not enough facilitators for groups doing the retrospective and problem-solving workshop

Ways to overcome:

The RTE and scrum masters or team coaches may know other teammates who could act as facilitators. Many people have basic facilitation and small group skills from other areas of their life, even if it's not their main role in your ART.

One part of the I&A event goes over its timebox

Ways to overcome:

If this happens repeatedly, plan more practice with your presenters and facilitators going forward. In the moment, consider if you can move people through the next section faster or borrow a few minutes from some breaks to make up time.

Teams struggle to name a problem for the problem-solving workshop

Ways to overcome:

Prepare the group facilitators ahead of time with powerful questions they can ask the group to elicit responses and ideas to consider as system needs or problems.

People don't see action on improvement items added to the backlog, so they think the retro and problem-solving portion is a waste of time

Ways to overcome:

It's important to provide visibility to improvement items, including both the plan and execution. Consider leveraging syncs to discuss improvement items. In addition, have a plan for showcasing progress on improvement items.