SAFe PI PLANNING: PREP AND FUTURE STATE

Compiled from the field with enhancements by
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OVERVIEW

PREPARATION TIMELINE

   THREE MONTHS BEFORE...

   ONE MONTH BEFORE...

   TWO WEEKS BEFORE...

   ONE WEEK BEFORE...

   ONE DAY BEFORE...

   DAY OF...

   POST-PI PLANNING

PI-PLANNING FUTURE STATE

THREE MONTHS BEFORE…

- Confirm PI Planning dates with leadership. Coordinate with predecessor dependencies for availability (e.g. dependency, enabler teams).

- Update invitee checklist broken out by teams on Release Train or Solution Train. RTE's can facilitate.

- Setup meeting invites for PI Planning

- Set team expectations for Demos. Given sprints on same cadence, System Demo at end of sprint or end of PI?

- Determine and execute training needed for next PI

- Identify and fill missing roles (e.g. RTE, Scrum Master, STE, PO)

ONE MONTH BEFORE...

- Teams start preparing for PI Planning.

- Prepare Product Owners for PI Planning (confidence vote, business value, retro).

- Create dashboard and feature work-items or wiki page for next PI Planning.

- Create/update agenda for PI Planning.

- Identify and confirm agenda owners.

- Update PI Planning queries that are a part of the dashboard/wiki.

- Organize collaboration (main agenda, breakout sessions, I&A etc) expected from predecessor teams.

- Check iterations in ALM tool (Jira, ADO, Rally, etc.) to ensure all have been properly created for the next PI.

- Prepare for event type (hybrid, virtual, local).

TWO WEEKS BEFORE...

- Ensure business/PO have prepared clear vision and context and are prepared to present.

- Team backlogs should be generally identified so objectives can be defined.

- Create program roadmap in ALM tool.

- Update general Defs of Ready for Scrum of Scrums and PO Sync.

- Assign traffic cop in main room if breakout rooms are used.

- Communicate enabler work needed to responsible enabler teams (may need to be done much sooner).

- Ensure LACE or Kaizen group are ready with improvement backlog work-items for upcoming PI.

ONE WEEK BEFORE...

- Create the PI Planning confidence vote in preferred tool.

- Add confidence vote links to dashboard.

- Create the PI Planning Retro board.

- Determine if participating teams meet PI Planning Definition of Ready

- Determine of PI Definition of Ready (this checklist) has been met.

ONE DAY BEFORE...

- Check links on backlog tool dashboard (not broken, point to correct PI).

DAY OF...

- Activate breakout rooms.

- Share retro board link, encourage addition of entries throughout event.

POST-PI PLANNING...

- Ensure Planning Retro kaizens are captured in improvement backlog for next PI.

- Review issues and risks, determine actions to be taken.

- Update quarterly planning readout with objectives.

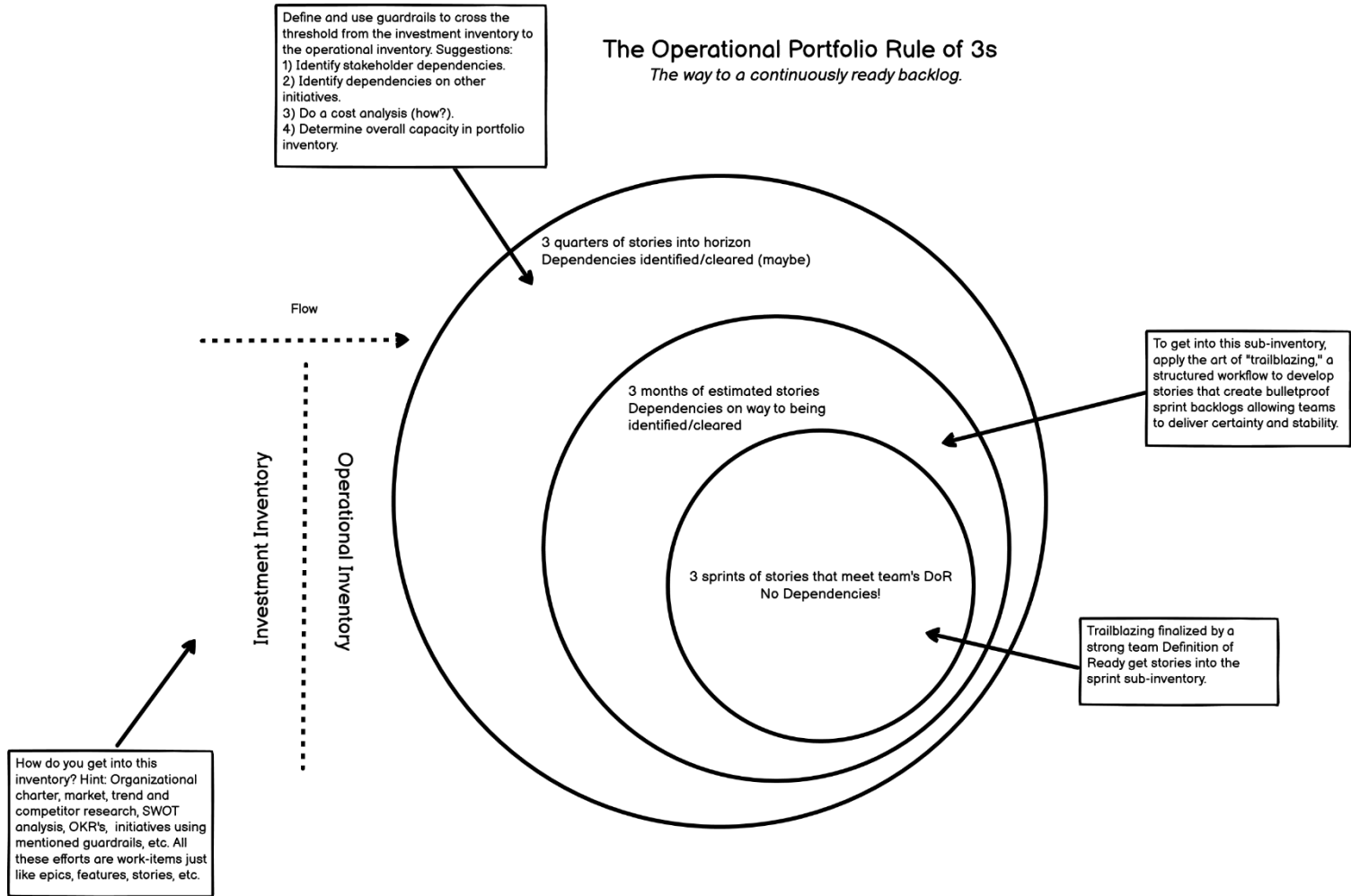# PI PLANNING FUTURE STATE (LEAN OUT THE SYSTEM)
BY JAMES K SMITH

Gen. DD Eisenhower: "Plans are nothing…Planning is everything…"

The great philosopher Mike Tyson: "Everybody has a plan until they get punched in the face…"

- PI Planning is designed to create an execution ready state baseline.

- But it only provides four ready states a year in its classic pattern.

- This is simply creating a smaller waterfall window and is not enough planning to deliver continuous value with a high level of certainty and stability.

- Good value stream practices allow for a <u>continuous</u> ready state via continuous planning. Hint: Achieve adherence to the "Rule of 3's." See next slide.

- Use initial PI Plannings to determine a ready state baseline, then strive to move beyond PI Planning to maintain a continuous ready state.

- Maintaining continuous ready state (once achieved) requires less energy and creates more capacity than creating new ready states. It's much easier to modify via short iterations than building from scratch.

- Continue with PI Planning, but as a much leaner exercise in validation of continuous ready state instead of relying on it for creation of ready states.

*Rule of 3's:

DEPRECATE THE NEED FOR PI PLANNING...

Define and use guardrails to cross the threshold from the investment inventory to the operational inventory. Suggestions:
1) Identify stakeholder dependencies.
2) Identify dependencies on other initiatives.
3) Do a cost analysis (how?).
4) Determine overall capacity in portfolio inventory.

The Operational Portfolio Rule of 3s
The way to a continuously ready backlog.

3 quarters of stories into horizon
Dependencies identified/cleared (maybe)

Flow

To get into this sub-inventory, apply the art of "trailblazing," a structured workflow to develop stories that create bulletproof sprint backlogs allowing teams to deliver certainty and stability.

3 months of estimated stories
Dependencies on way to being identified/cleared

Investment Inventory

Operational Inventory

3 sprints of stories that meet team's DoR
No Dependencies!

Trailblazing finalized by a strong team Definition of Ready get stories into the sprint sub-inventory.

How do you get into this inventory? Hint: Organizational charter, market, trend and competitor research, SWOT analysis, OKR's, initiatives using mentioned guardrails, etc. All these efforts are work-items just like epics, features, stories, etc.