

Program Increment Planning Logistics and Communications Checklist

PI Planning Preparation

- ☐ Establish event timeline
- ☐ Confirm Event POCs/Facilitator(s) (RTE or Scrum Team Member(s))
- ☐ Confirm Event Stakeholders and assign roles and responsibilities for each
- ☐ Prepare the business context, portfolio themes, and user stories
- ☐ Set date(s)/time(s) for PI Planning Event
- ☐ Identify read-ahead materials for the event
- ☐ Establish and share a location for all stakeholders to access event content
- ☐ Create/send invitations with links/attachments for attendees to review read-ahead materials
- ☐ Confirm collaboration tool(s) (i.e., Mural, MS Teams, etc.) and document instructions for users
- ☐ Create and distribute an internal PI Planning calendar for Scrum Masters to include dry runs/walkthroughs/simulations of the PI Planning Event

Dry Run of Agenda

- ☐ Confirm Scrum Team roles (facilitators, note taker, breakout room moderators, and backup roles)
- ☐ Verify presentation materials have been finalized
- ☐ Assign and prepare Presenters
- ☐ Verify all PI Planning Event details have been distributed to attendees
- ☐ Confirm attendees' roles and accessibility
- ☐ Populate online collaboration tools with content and test accessibility
- ☐ Test equipment/connectivity and identify potential logistical barriers; document and test associated potential solutions

Simulation of PI Planning Event

- ☐ Set up Breakout Rooms for teams and assign participants to each room
- ☐ Set up online poll for the Confidence Vote
- ☐ Set up online survey to capture post-PI planning feedback
- ☐ Confirm all content for collaboration and presentation materials
- ☐ Publish the event agenda
- ☐ Simulate all aspects of the agenda with an emphasis on flow and support of PI Planning objectives
- ☐ Further test the hosting of Breakout Rooms, time keeping accuracy, digital tool access, and screen sharing capabilities
- ☐ Resolve any remaining technological constraints