

## GETTING STARTED

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# How to Run PI Planning with Easy Agile Programs

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**What is  
PI Planning?**

# what is PI Planning?

*PI Planning is a 2 day event which sees all members of an Agile Release Train (ART) come together to plan out their next Program Increment.*

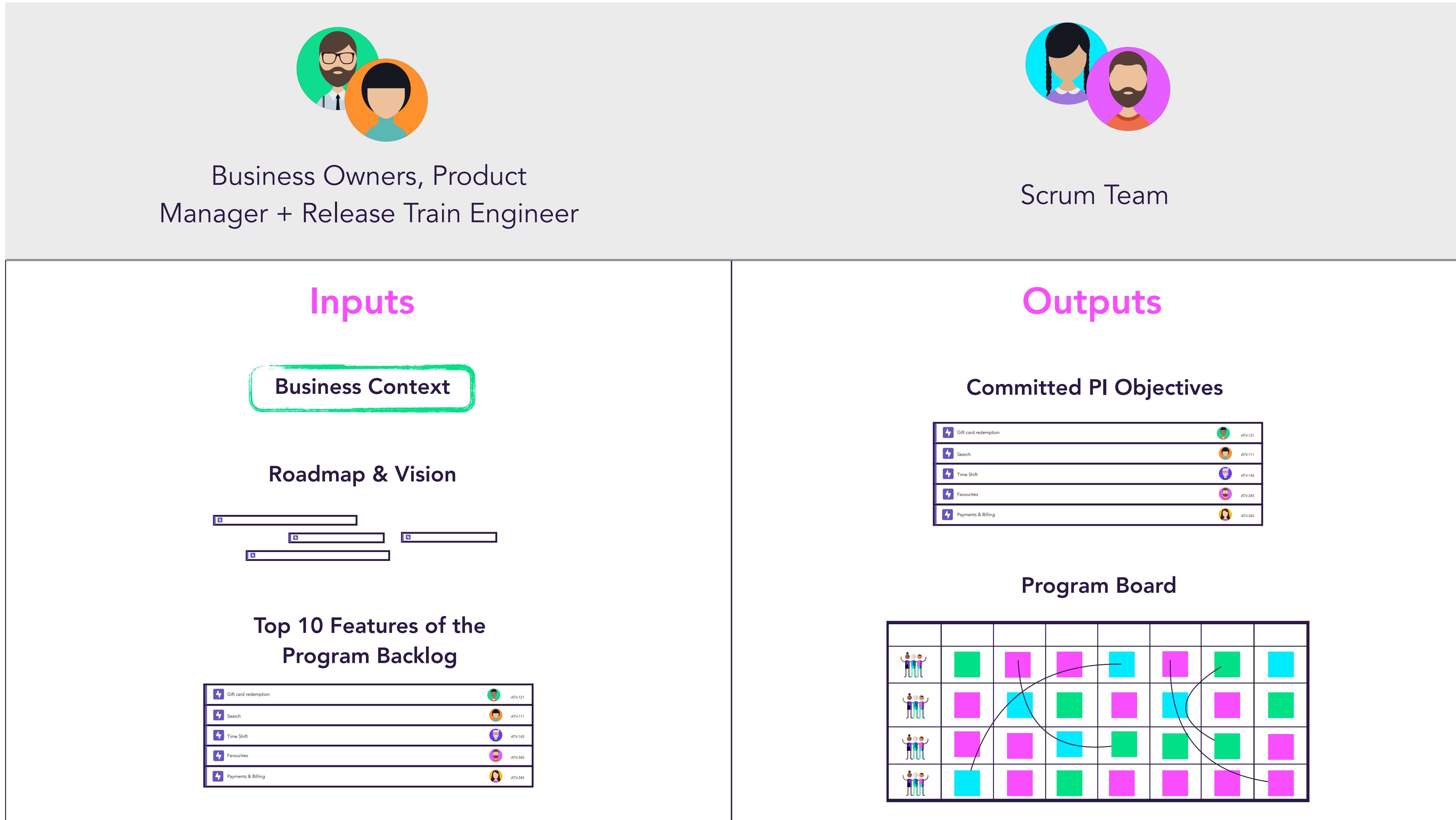
## **Some of the activities that occur during a PI Planning session include:**

- A senior executive/business owner describes the current state of the business
- Product Management presents the current program vision (typically represented by the next top 10 upcoming features)
- Product Owners and their teams, break estimate and plan work to achieve committed Features
- The teams identify and visualise cross-team dependencies and work to remove blockers
- A committed plan, in the shape of a Program Board is agreed upon by the conclusion of the event

# benefits of PI Planning

- ✓ Establishing face-to-face communication across all team members and stakeholders
- ✓ Building the social network the ART depends on
- ✓ Aligning development to business goals with context of the business, vision and Team and PI objectives
- ✓ Identifying dependencies & fostering cross-team and cross-ART collaboration
- ✓ Matching demand to capacity, eliminating excess Work In Progress (WIP)
- ✓ Fast decision-making

# anatomy of a PI Planning session



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# 2 Day PI Planning Session Agenda

# PI Planning agenda

DAY 1 AGENDA		DAY 2 AGENDA	
08:00 - 09:00	Business Context	08:00 - 09:00	Planning Adjustments
09:00 - 10:30	Product/Solution Vision	09:00 - 11:00	Team Breakouts
10:30 - 11:30	Architecture Vision & Development Practices	11:00 - 13:00	Final Plan Review & Lunch
11:30 - 13:00	Planning Context & Lunch	13:00 - 14:00	Program Risks
13:00 - 16:00	Team Breakouts	14:00 - 14:15	Confidence Vote
16:00 - 17:00	Draft Plan Review	14:15 - ??	Plan Rework?
17:00 - 18:00	Management Review & Problem Solving	Planning Retrospective & Moving Forward	

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**Who is involved  
in a PI Planning Session?**

# business owners

A professional portrait of a woman with blonde hair and glasses, smiling and wearing a grey blazer over a dark patterned top. A blue diagonal banner at the bottom right contains her name.

Linda  
Business Owner

## PI Planning Battlecard

**"I provide context on the current state of the business"**

### DAY 1:

- At the beginning of Day 1, I describe the current state of the business and present a perspective on how well existing solutions are addressing current customer needs
- I watch for significant external commitments and dependencies during planning
- I review the 'Draft plan' put forward by teams with Product Management and other stakeholders

### DAY 2:

- During the Team Breakouts, I assign business value to each of the team's PI Objectives
- During the 'Final Plan Review', I assist to adjust scope and compromise as necessary

# release train engineer



Alice  
Release Train Engineer

## PI Planning Battlecard

**"I facilitate the PI Planning event"**

### DAY 1:

- I act as the PI Planning Facilitator for the 2 days
- After the product/solution vision is presented, I present the planning process and the expected outcomes for the 2 days
- At the end of Day 1, it is my job to facilitate the 'Management Review and Problem-Solving' session

### DAY 2:

- At the end of Day 2, I run a brief retrospective on the event
- After the event is finished, I summarise the Team PI Objectives into a set of Program PI Objectives and use this to communicate exter. and track progress towards the set goals

# product manager

A portrait of a smiling Black man with short hair and a beard, wearing a light-colored t-shirt over a blue collared shirt. He is looking directly at the camera. The background is blurred.

—

**James**  
Product Manager

## PI Planning Battlecard

**"I provide the vision for the product/solution"**

### DAY 1:

- At the beginning of Day 1, I present the current Program vision (upcoming top 10 Features) as well as any forthcoming Milestones (I own the prioritisation of these Features by Business Value)
- At the end of Day 1, I review the 'Draft plan' put forward by the teams with the Business Owners & Stakeholders

### DAY 2:

- At the beginning of Day 2, I describe any changes to planning & scope resources discov. in the 'Management Review & Problem Solving' session at the end of Day 1
- After the event, I use the Program Objectives from the RTE to update the roadmap

# product owner

A portrait of a young man with short brown hair and a beard, wearing black-rimmed glasses and a white t-shirt. He is smiling at the camera. The background is a plain, light-colored wall.

—

**Daniel**  
Product Owner

## PI Planning Battlecard

**"I have content authority to make decisions at the User Story level"**

### DAY 1:

- In 'Team Breakout #1', I have content authority to make decisions at the User Story level (I own the Team Backlog)
- I help my team with story definition, providing clarifications to assist with estimation and sequencing
- I draft the Team's PI Objectives for review

### DAY 2:

- In 'Team Breakout #2', I continue to lead the team in making any adjustments outlined after the 'Management Review' at the end of Day 1
- I present my Team's final plan to the group, stating any risks and impediments
- I participate in the Team 'Confidence Vote'
- I help the team to rework the plan if initial consensus is not met

# scrum master



Vivek  
Scrum Master

## PI Planning Battlecard

**"I facilitate the team's progress towards the team goals"**

### DAY 1:

- In 'Team Breakout #1', I help my team to estimate their capacity (velocity) for each iteration
- I manage the tight timebox, dependencies and ambiguities during the Team Breakout session

### DAY 2:

- I continue to assist the PO and Dev. Team during 'Team Breakout #2', helping to finalise our Team PI Objectives, to be assigned Business Value by the Business Owners
- I participate in the Team 'Confidence Vote'
- If the team does not reach a consensus after the 'Confidence Vote', I help the team to rework the plan until consensus is achieved

# development team



**Jake**  
Developer

## PI Planning Battlecard

**"I work with my team to create stories, identify risks and dependencies & create Team PI Objectives"**

### **DAY 1:**

- In 'Team Breakout #1', I collaborate with my Product Owner to create and refine user stories and acceptance criteria
- I help my team identify risks and dependencies
- I work with my team and Product Owner to draft our Team PI Objectives

### **DAY 2:**

- In 'Team Breakout #2', I continue work with my team to make any adjustments to our working plan
- I help my Product Owner and team finalise our Team PI Objectives
- I participate in the Team 'Confidence Vote'

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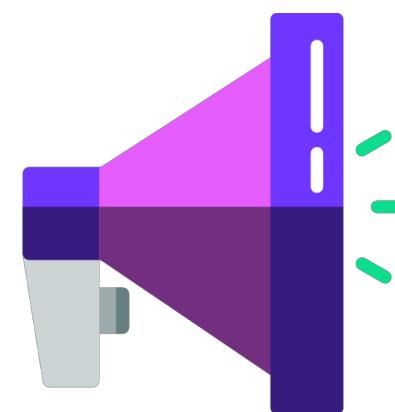
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# Difficulties Running a Physical PI Planning Session

# difficulties running a physical session



Cost associated with geo-distributed organisations flying in employees for the 2 day event  
(can be up to 5 times per year)



Difficulty in conveying information to non-participating team members after the event  
(dependency visualisation in tools such as Jira, lack context of the physical Program Board)



Ability to track the progression of the Program with geo-distributed team members after the planning is finished

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# Overview of Easy Agile Programs for Jira

# Programs Breakdown

## Program Roadmap

## Increment Overview

## Team Planning Board

The screenshot shows the Jira Software Program Roadmap interface for the 'Ads Experience Program'. The roadmap is displayed as a timeline from January to March 2019. A blue header bar labeled 'Increment 1' spans the period from January 1st to approximately January 20th. Below this, three tasks are listed:

- AE-3 Encourage Trial and Usage of Across Product Suite** (Due Jan 20, 2019) - Status: In Progress (indicated by a lightning bolt icon)
- AE-1 Ensure a Highly Personalised Customer Exp...** (Due Feb 10, 2019) - Status: To Do (indicated by a circle icon)
- GEA-118 Increase Value of Content Shown to Cu...** (Due Mar 10, 2019) - Status: To Do (indicated by a lightning bolt icon)

At the top of the page, the navigation bar includes links for Jira Software, Dashboards, Projects, Issues, Boards, Create, and Search.

# Programs Breakdown

## Program Roadmap

## Increment Overview

## Team Planning Board

The screenshot shows the Jira Software interface for the 'Ads Experience Program / Increment 1'. The top navigation bar includes 'Jira Software', 'Dashboards', 'Projects', 'Issues', 'Boards', 'Create', and a search bar. The main title is 'Increment Overview' under 'Feature Roadmap'. A dropdown menu for 'Feature Roadmap' is open, showing items like 'AE-3 Encourage Trial and Usage of Across Product Suite' (with a lightning bolt icon) and 'AE-1 Ensure a Highly Personalised Customer Experience'. Below this, four columns represent 'Sprint 1', 'Sprint 2', 'Sprint 3', and 'Sprint 4'. Under 'Growth & Experiment Analysis', there are five items: 'GEA-1 As an Agile team, I'd like t...', 'GEA-2 As a product owner, I'd lik...', 'GEA-4 As a team, I'd like to esti...', 'GEA-5 RTE / I can see dependen...', and 'GEA-8 As a developer, I'd like to ...'. Under 'Content Discovery & Data Science', there are four items: 'CDDS-35 As a product owner, I'...', 'CDDS-2 As a product owner, I'd l...', 'CDDS-5 As a team, I'd like to co...', and 'CDDS-4 As a team, I'd like to est...'. Under 'Ads Billing', there are two items: 'AB-17 As an Ads Manager / I onl...' and 'AB-18 As a Customer / I want to ...'. Under 'Ads Analytics', there are four items: 'AA-7 As a team, I'd like to commi...', 'AA-8 As a developer, I can updat...', 'AA-9 As a product owner, I'd like...', and 'AA-10 As a scrum master, I'd like...'. Under 'Ads API', there are four items: 'AAPI-8 As an Agile Team, I'd like ...', 'AAPI-9 As a developer, I'd like to...', 'AAPI-15 As a Scrum Master, I ca...', and 'AAPI-11 As a team, I'd like to esti...'. Each item has a small green and blue icon next to it.

# Programs Breakdown

## Program Roadmap

## Increment Overview

## Team Planning Board

Jira Software Dashboards Projects Issues Boards Create

Programs / Ads Experience Program / Increment 1 / Growth & Experiment Analysis

Team Planning

Feature Roadmap

AE-3 Encourage Trial and Usage of Across Product Suite

AE-1 Ensure a Highly Personalised Customer Experience

GEA-118 Increase Value of Content Shown to C

Sprint 1 - 2019 Inc.1 Sprint 2 - 2019 Inc.1 Sprint 3 - 2019 Inc.1 Sprint 4 - 2019 Inc.1

25 of 30 Story Points 10 of 45 Story Points 30 of 25 Story Points 18 of 40 Story Points

As an Agile team, I'd like to learn about Scrum >> Click the "GEA-1" link at the left of GEA-1 10 GEA-2 10 GEA-4 10 RTE / I can see dependency links between program teams GEA-5 8 GEA-112 15 GEA-111 20 GEA-102 10

As a developer, I'd like to update story status during the sprint >> Click the Active sprints GEA-8 15 GEA-112 15 GEA-111 20 GEA-102 10

As a product owner, I'd like to express work in terms of actual user problems, aka User GEA-2 10 GEA-4 10 GEA-111 20 GEA-102 10

As a scrum master, I'd like to break stories down into tasks we can track during the GEA-112 15 GEA-111 20 GEA-102 10

As a user, I can find important items on the board by using the customisable "Quick GEA-111 20 GEA-102 10

Content Discovery & Data Science

As a product owner, I'd like to rank stories in the backlog so I can communicate the CDDS-35 5 CDDS-2 10 CDDS-5 10 CDDS-4 8

As a product owner, I'd like to express work in terms of actual user problems, aka User CDDS-2 10 CDDS-5 10 CDDS-4 8

As a team, I'd like to commit to a set of stories to be completed in a sprint (or CDDS-5 10 CDDS-4 8

As a team, I'd like to estimate the effort of a story in Story Points so we can understand CDDS-4 8

## GETTING STARTED

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# Conducting PI Planning in Easy Agile Programs for Jira



# Setting Business Context

Business Owners can share a recorded video/presentation with all members of the ART by linking to a Confluence page in the Program details section.

This presentation/recording is not restricted to team members being physically present during planning, and can be reflected on throughout the entirety of the planning session

The screenshot shows the Jira Software interface for managing programs. In the center, a modal window titled "Ads Experience Program" is open. It contains fields for "Program Name\*" (set to "Ads Experience Program") and "Objectives and Roles for this Program". Below these fields is a rich text editor toolbar with options for "Normal text", "B", "I", "...", and "“”. Underneath the toolbar, there is a link to "Business Context Presentation - 1st January 2019". Below the presentation link, the roles and names of the team members are listed: "Release Train Engineer: Alice", "Program Manager: James", and "System Architect: Vivek". At the bottom of the modal, there is a "Team Boards" section with several board names listed: "Growth & Experiment Analysis", "Content Discovery & Data Science", "Ads Billing", "Ads Analytics", "Ads API", "Ads Campaign Management", and "Ads Experimentation Kanban". A "Program Roadmap" section follows, containing three radio button options: "I want to schedule epics from Team boards onto my Program Roadmap", "I want to schedule epics from a dedicated board onto my Program Roadmap", and "I want to schedule other issue types from a dedicated board onto my Program Roadmap". At the very bottom of the modal are two buttons: "Update Program" and "Close". The background of the main Jira interface shows a "Program Roadmap" for the year 2019, specifically for January. Increment 1 is highlighted, and it lists items like "AE-3 Encourage Trial and Usage of Across Product Suite" and "GEA-118 Increa...". Increment 2 is also visible on the right side.



# Setting Product/ Solution Vision

Rather than presenting the top 10 Features in a list-like document, Program Managers are able to schedule their Jira Features (Epics) onto a visual timeline for the duration of an Increment and share with the entire ART

The screenshot shows the Jira Software Program Roadmap interface. At the top, there's a navigation bar with 'Jira Software' and various menu items like 'Dashboards', 'Projects', 'Issues', 'Boards', 'Create', 'Search', and settings. Below the header, it says 'Programs / Ads Experience Program' and 'Program Roadmap'. On the right, there are buttons for 'Edit Program', 'New Increment', and a help icon. The main area is a timeline from January to March 2019. 'Increment 1' (January) contains two epics: 'AE-3 Encourage Trial and Usage of Across Prod...' and 'GEA-129 Distrib...'. 'Increment 2' (February) contains one epic: 'AE-1 Ensure a Highly Personalised Customer Exp...'. 'Increment 3' (March) contains one epic: 'GEA-118 Increase Value of Content Shown to Cu...'. Each epic card has a title, a progress bar, and a 'View Increment' or 'Edit Roadmap' button. A '...' button is also present in the increment header.

# Team Breakouts: Setting Capacity



Each team has their own  
'Team Planning Board'  
which can be found in their  
Project Sidebar.

Here, Product Owners and  
their teams set the capacity  
for each Sprint within their  
Program Increment

The screenshot shows a Jira Software interface for 'Growth & Experiment Analysis Team Planning'. At the top, there's a navigation bar with 'Jira Software', 'Dashboards', 'Projects', 'Issues', 'Boards', 'Create', 'Search', and other icons. Below the navigation is a sidebar with various project management icons. The main area displays a 'Feature Roadmap' with several items: 'AE-3 Encourage Trial and Usage of Across Product Suite', 'GEA-129 Distributed Platform', 'AE-1 Ensure a Highly Personalised Customer Experience', 'GEA-118 Increase Value of Content Shown to Customers', and 'GEA-130 GUI'. Below the roadmap, a horizontal bar shows capacity allocation across five sprints: 'Sprint 1 - 2019 Inc.1' (0 of 60 Story Points), 'Sprint 2 - 2019 Inc.1' (0 of 35 Story Points), 'Sprint 3 - 2019 Inc.1' (0 of 30 Story Points), 'Sprint 4 - 2019 Inc.1' (0 of 40 Story Points), and 'Sprint 5 - 2019 Inc.1' (0 of 30 Story Points).

Team Planning Board

# Team Breakouts: Scheduling Work



With the context of the Feature Roadmap at the top of their planning session, teams are able to drag and drop existing issues from their backlog and schedule them into their Sprints.

Teams can also create new issues within the planning board to support Feature completion

Jira Software Dashboards Projects Issues Boards Create Search ? 🔍 📈 🌐 🏠 🎯

Programs / Ads Experience Program / Increment 1 / Growth & Experiment Analysis

## Growth & Experiment Analysis Team Planning

Feature Roadmap

AE-3 Encourage Trial and Usage of Across Product S... ⚡

GEA-129 Distributed P... ⚡

AE-1 Ensure a Highly Personalised Customer Experie... ○

GEA-118 Increase Value of Content Shown to Custom... ⚡

GEA-130 GUI ⚡

Sprint 1 - 2019 Inc.1 Sprint 2 - 2019 Inc.1 Sprint 3 - 2019 Inc.1 Sprint 4 - 2019 Inc.1 Sprint 5 - 2019 Inc.1

10 of 60 Story Points 40 of 35 Story Points 10 of 30 Story Points 10 of 40 Story Points 0 of 30 Story Points

As a team, I'd like to estimate the effort of a GEA-4 10 ⚡

As a developer, I'd like to update story status GEA-8 15 ⚡

RTE / I can see dependency links GEA-5 8 ⚡

As a product owner, I'd like to express work in GEA-2 10 ⚡

As a scrum master, I'd like to break stories down into GEA-112 - ⚡

As a developer, I can update details on an item GEA-10 - ⚡

As a user, I can find important items on the GEA-11 25 ⚡

As a user, I'd like a historical story to show in GEA-20 2 ⚡

Instructions for deleting this sample board and GEA-14 - ⚡

Story X ✓

View Program Increment Teams Dependencies Backlog

### Issues

Quick filters

GEA-12 As a scrum master, I can see the p... 4 ⚡

GEA-115 Link new issues to issues on the ... 10 ⚡

GEA-111 As a user, I can find importan... 20 ⚡

GEA-1 As an Agile team, I'd like to learn a... 10 ⚡

GEA-25 As a product owner I can update t... 5 ⚡

GEA-102 Product Owner / drag and drop i... 10 ⚡

GEA-128 We need to also complete this thi... - ⚡

GEA-6 As a scrum master, I'd like to brea... 15 ⚡

GEA-9 As a developer, I can update story ... 20 ⚡

GEA-7 As a product owner, I'd like to includ... - ⚡

GEA-103 As a team member I can see dep... 3 ⚡

GEA-13 As a team, we can finish the sprint... 2 ⚡

GEA-15 As a user, I'd like a historical story ... 3 ⚡

GEA-3 As a product owner, I'd like to rank ... 5 ⚡

Team Planning Board

# Team Breakouts: Cross Team Planning

Teams can add other teams within a Program into their Team Planning Board.

This visibility into cross-team planning allows for faster and easier dependency discovery.

Simple drag and drop is used to create and visualise cross-team dependencies



Jira Software Dashboards Projects Issues Boards Create Search ? ⚙️ 🎤

Programs / Ads Experience Program / Increment 1 / Growth & Experiment Analysis

## Growth & Experiment Analysis Team Planning

?

View Program Increment

Teams Dependencies Backlog

### Feature Roadmap >

Sprint 1 - 2019 Inc.1	Sprint 2 - 2019 Inc.1	Sprint 3 - 2019 Inc.1	Sprint 4 - 2019 Inc.1
10 of 60 Story Points As a team, I'd like to estimate the effort of a story in Story Points so we can GEA-4	40 of 35 Story Points As a developer, I'd like to update story status during the sprint >> Click the GEA-8	10 of 30 Story Points RTE / I can see dependency links between program teams GEA-5	10 of 40 Story Points As a product owner, I'd like to express work in terms of actual user problems GEA-2
As a developer, I can update details on an item using the Detail View >> Click GEA-10	As a user, I can find important items on the board by using the customisable GEA-11	As a user, I'd like a historical story to show in reports GEA-20	Instructions for deleting this sample board and project are in the description GEA-14

Content Discovery & Data Science

As a team, I'd like to estimate the effort of a story in Story Points so we can CDDS-4	As a scrum master, I'd like to break stories down into tasks we can track CDDS-6	As a product owner, I'd like to rank stories in the backlog so I can CDDS-34	As a product owner, I'd like to express work in terms of actual user problems, CDDS-2	As a product owner, I'd like to rank stories in the backlog so I can CDDS-35
As a product owner, I'd like to include bugs, tasks and other issue types in my CDDS-7	As a team, I'd like to commit to a set of stories to be completed in a sprint (or CDDS-5	As a user, I can find important items on the board by using the customisable CDDS-36	As a developer, I can update story and task status with drag and drop (click CDDS-9	As a developer, I can update details on an item using the Detail View >> Click CDDS-10

Content Discovery & Data Science 1

- Content Discovery & Data Science 1
- Ads Billing
- Ads Analytics
- Ads API
- Ads Campaign Management
- Ads Experimentation Kanban

GEA-20

CDDS-2

GEA-14

GEA-5

GEA-8

GEA-4

GEA-11

GEA-10

GEA-2

GEA-7

GEA-6

GEA-3

GEA-1

CDDS-4

CDDS-6

CDDS-34

CDDS-2

CDDS-35

CDDS-7

CDDS-5

CDDS-36

CDDS-9

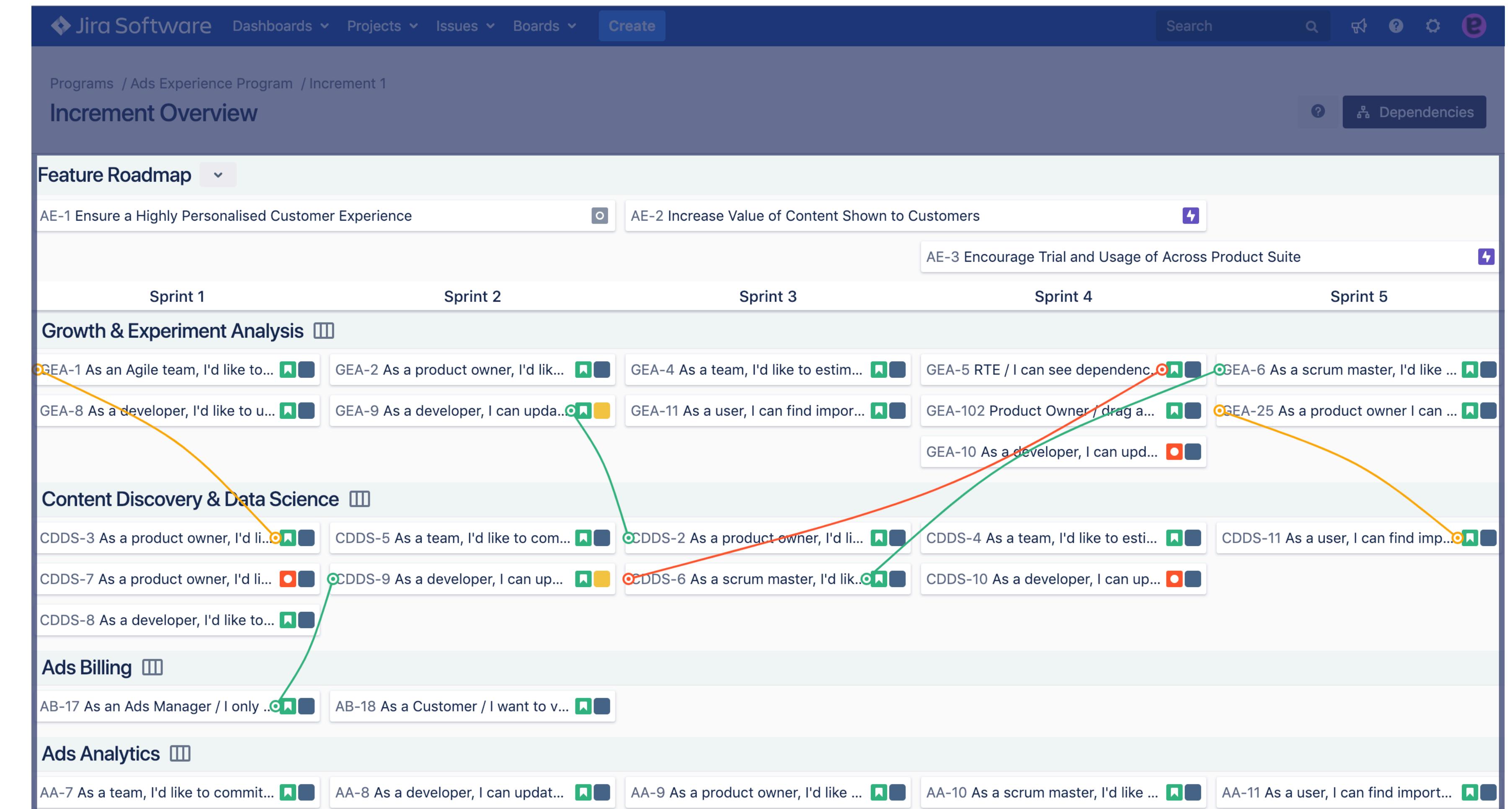
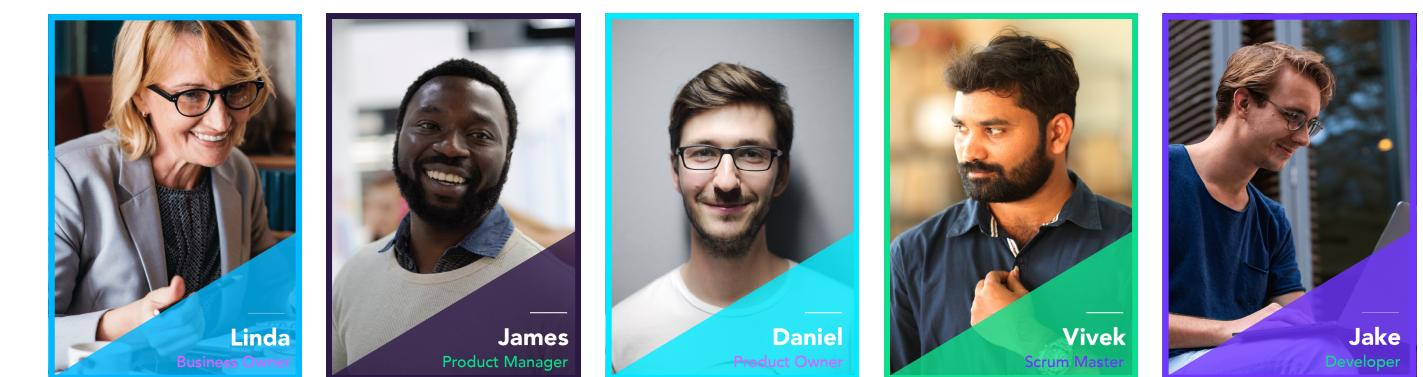
CDDS-10

# Team Planning Board

# Draft Plan Review

The Increment Overview is a digital representation of the physical Program Board created during the 2 day PI Planning session.

Teams can easily present their cross-team dependencies to the ART in this view, and unhealthy dependencies are quickly highlighted



Increment Overview

# Plan Review & Rework

The ability to inline edit issue estimates and summaries in real time, makes reworking the plan fast and simple.

All changes to issues in Easy Agile Programs are automatically reflected in Jira

Jira Software Dashboard showing the Feature Roadmap for the Growth & Experiment Analysis Team Planning program. The roadmap is organized into five sprints:

- Sprint 1 - 2019 Inc.1:** 10 of 60 Story Points. Includes stories GEA-4 (Story Points: 10) and GEA-10 (Story Points: 25).
- Sprint 2 - 2019 Inc.1:** 40 of 35 Story Points. Includes stories GEA-8 (Story Points: 15) and GEA-11 (Story Points: 25).
- Sprint 3 - 2019 Inc.1:** 10 of 30 Story Points. Includes stories GEA-5 (Story Points: 8) and GEA-20 (Story Points: 2).
- Sprint 4 - 2019 Inc.1:** 10 of 40 Story Points. Includes stories GEA-2 (Story Points: 10) and GEA-14 (Story Points: 2).
- Sprint 5 - 2019 Inc.1:** 10 of 30 Story Points. Includes stories GEA-112 (Story Points: 10) and GEA-1 (Story Points: 10).

A specific story in Sprint 3, GEA-5, has its summary and story points field highlighted with a blue box, containing the text: "RTE / I can see dependency links between program teams".

Team Planning Board

