



10 KEY STEPS TO

PI Planning

What Is It?

PI planning aligns Agile teams by fostering a shared vision. It involves business stakeholders, project owners, managers, and others who collaboratively review and establish priorities, goals, dependencies, and a clear direction for timely accomplishments. GovCIO's Agile DevSecOps team excels in guiding teams through this process, facilitating actionable plans and cultivating collaboration.

10 Key Steps in Our PI Planning

1. Set the Intent:

We begin by establishing the direction and intent of the PI planning, fed by the roadmap, in collaboration with customers and leadership. This ensures that the planning process is aligned with the organization's goals and specific customer needs.

2. Prepare for PI Planning (ART Launch):

Teams undergo meticulously designed training programs, including hands-on workshops, interactive seminars, and personalized coaching sessions led by seasoned Agile practitioners. This comprehensive preparation focuses on understanding business value, fostering cross-team collaboration, mastering effective estimation techniques, and honing risk management skills through real-world

simulations and case studies. This rigorous preparation ensures a deep grasp of agile principles and the PI planning process, instilling confidence and readiness within the team.

3. Break Down Features:

The product team brings prioritized features based on customer needs and organizational goals. Teams then break down these features into smaller, manageable stories that outline how the features will be implemented. This breakdown facilitates clearer task delegation among team members, optimizing efficiency and ensuring alignment with project objectives.

4. Estimate and Size Work:

Collaborate to estimate the effort required for each story, sizing them appropriately to create a realistic and achievable plan. This meticulous

planning ensures that resources are allocated efficiently, and potential bottlenecks are proactively addressed.

5. Plan Iterations:

Plan the iterations within the PI, assigning specific features and stories to each iteration while establishing clear timelines and expectations. This structured approach enables teams to prioritize tasks and maintain momentum throughout the project lifecycle.

6. Identify Objectives:

From the planned iterations, the team defines clear objectives in a SMART manner (Specific, Measurable, Achievable, Relevant, Time-bound) that align with the organization's overarching goals and customer needs. This step lays the foundation for a focused and strategic approach to achieving milestones and delivering value.

7. Manage and Communicate Dependencies:

Use tools such as a program board to visualize and plan dependencies between teams and components, ensuring synchronization and minimizing conflicts.

8. Assess Risks:

Identify potential risks and obstacles that could impact delivery, and classify them using the ROAM method (Resolved, Owned, Accepted, Mitigated). Devise strategies to address these risks proactively.

9. Align and Commit with Stakeholders:

Engage stakeholders and relevant parties to ensure alignment and mutual commitment. After thorough discussions, teams formally commit to the planned objectives for the PI, distinguishing between committed and uncommitted goals. All team members participate in this process using the "fist of five" technique to express their level of agreement, ensuring full team endorsement.

10. Create a Visual Incremental Roadmap:

Finally, create a visual roadmap of the entire PI, encompassing planned work, dependencies, risks, and milestones. This roadmap guides execution and ensures transparency, resulting in a comprehensive PI plan that offers a clear, actionable, and aligned strategy.



Learn more about our Lean Agile Center of Excellence at govcio.com/lace