



The Atlassian guide to virtual PI planning

How to foster collaboration, build momentum, and
create a plan when you can't bring everyone together

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How to be successful with virtual PI planning

One of the tenets of scaled agile development, or any agile practice, is open communication among everyone on the product delivery team. To that end, program increment planning, or PI planning, is one of the most important events in SAFe. This event brings together dozens of people from business strategy, product management, and engineering into one “Big Room” to align and prioritize the next increment of development work.

But teams aren’t always able to physically meet in one space for several days, either due to travel restrictions, the disruption to personal lives that comes with time away from home, or because of the prohibitive costs. While less than ideal, many organizations find they need to adjust and shift their Big Room events to the virtual world.

That said, a virtual PI planning session can be turned into an organizational advantage. Beyond the increased focus on how teams collaborate within a virtual format, you can take this opportunity to assess your digital tools. The implementation of digital collaboration tools can act as a forcing function for strong alignment, precise communication, and documenting plans so teams can meet product delivery goals.

Besides enabling better communication and collaboration among teams, there are three other important benefits digital collaboration tools can offer to the entire organization:



Documenting business objectives, product vision, roadmaps, and development plans in one system allows everyone access to a single source of truth.



Business and operations stakeholders who typically aren’t involved in all of the PI planning activities can see what is being prioritized at any time.



Centralizing plans and tracking the work makes it more visible, supports mutual understanding, highlights risks and dependencies, and supports an open and collaborative culture.

In this guide you'll learn how to:

- Assemble and prepare a leadership team for virtual planning and facilitation
- Design an agenda and activities meant for people who are in front of screens
- Create content and documentation ahead of time so people can absorb information, ask clarifying questions, and come prepared for the event
- Choose the digital and collaboration tools you'll need to support the event
- Facilitate small-group discussions that will take the place of “hallway” meetings and support decision-making

PI planning is the foundation of SAFe

A fundamental practice in scaling agile is aligning teams to shared objectives with program increment (PI) planning. Ideally, this occurs on a regular cadence (usually every 8, 10, or 12 weeks) and typically takes place in what's called Big Room planning. Just like it sounds, this two-day, facilitated event includes all program stakeholders and the product delivery team, sometimes as many as 150 (or more) people. PI planning allows program teams to determine who is responsible for which aspects of the work and how they'll manage dependencies.

With regular PI planning, teams can focus on building the right things for their customers, more efficiently and faster, ensuring they reliably deliver value.

“PI Planning is the activity that helps organizations move from team-based agility to enterprise agility. With the right pre-planning, proactive facilitation, and digital tools teams can experience almost the same energy, collaboration, and real-time problem-solving in a virtual event.

TOM O'CONNOR, JIRA ALIGN SOLUTION ARCHITECT

What's different about virtual PI planning events

Preparing and running a virtual PI planning event isn't as simple as writing slides, sharing screens, and pointing a laptop camera at a whiteboard. You have to structure the event – and each session – in a way that gives participants the right information at the right time. This way the planning exercises keep everyone engaged so you can get the right input from your teams.

Design the event experience specifically for screens

When people are in front of their computers they take in information and interact with each other much differently than they do when in person. Moreover, in the case of virtual PI planning, people are in front of screens for several consecutive hours over several days. Keeping the teams engaged and focused on making decisions is critical.

The important changes you have to make for a virtual PI planning event are:



Make vision presentations and product roadmaps available online, in advance



Alter the cadence and timing of each session and the overall PI planning event



Replicate small group discussions and decision-making in breakout sessions



Allow everyone to share ideas and capture risks and dependencies – and avoid tuning out



Ensure teams have the tools to visually connect their plans to the goals and objectives of the upcoming program increment



Most importantly, make sure people aren't bored!

Tools to keep teams engaged and aligned

Presentations and discussions

- Slack
- Zoom
- Confluence
- Trello
- Jira Align

Product strategy planning

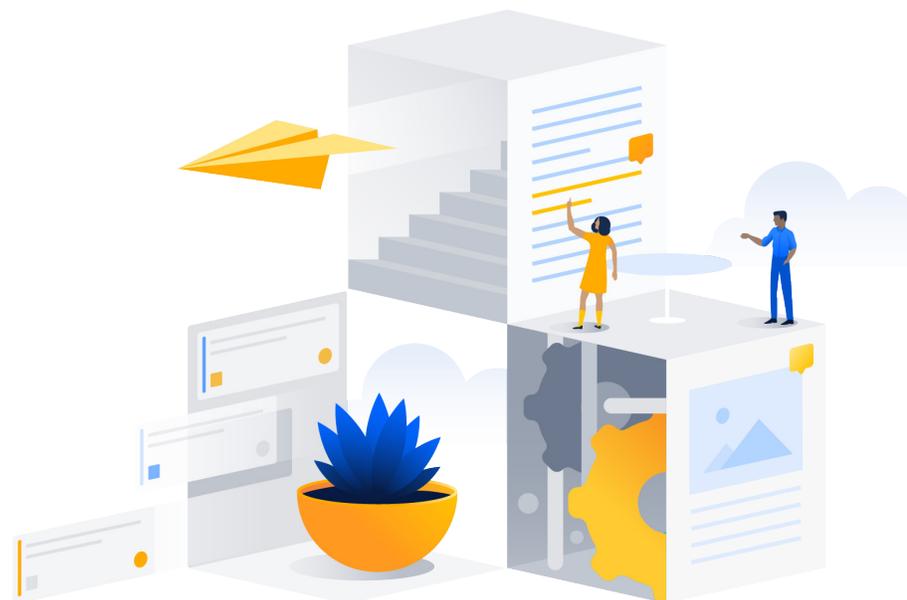
- Strategy board
- Program board
- Roadmaps
- Kanban board

Confidence voting

- Miro
- Mural
- Questions for Confluence
- Trello



If you need to provision new digital tools for your virtual planning event, don't forget to give your IT team plenty of advance notice to secure permissions and licenses for the expected number of concurrent users.



Advanced preparation is key to success

The pre-planning for a virtual event is more involved than for an in-person, Big Room meeting. This is because you have to be really clear about roles, responsibilities, orchestrating the content development in advance (more on that later), and facilitating the event itself.

Assign leaders with experience running a PI planning event

It's important to choose people who have run, or at least participated in, Big Room events. They'll know best how to design the agenda, who needs to contribute to the pre-planning sessions, and they'll understand how to translate the in-person experience to a virtual meeting. Ideally, they will also be facilitators of the event.

The planning team



Release train engineer

This person, an RTE, runs the event “on camera” and keeps the program running.



Team facilitator

Often a scrum master, this person keeps an eye on the discussion channel and makes sure the team is on track and mindful of the clock.



Online facilitator

This person posts messages to shared discussion channels, manages video breakout rooms, and attends to any questions related to the collaboration tools.

You also need planners, often scrum masters, that will help you make sure that all the teams come prepared with a common understanding of the goals.

Once you've designated your team members and assigned responsibilities, schedule time for a dry run of the event, making sure everyone knows how to facilitate each activity and how to use the conference and collaboration tools.

Design a schedule that respects timezones and reduces screen fatigue

The suggested agenda for PI planning, per SAFe, is about two consecutive days, seven agenda items each day, and each session runs for 90 minutes. However, research shows that the most significant challenge to a virtual meeting is each participant's reduced ability to focus when in front of a screen. Plus, as you probably know, the suggested length of a daily scrum meeting is less than 15 minutes. But the suggested length of an agenda item for in-person PI planning, according to SAFe, is 90 minutes.

That's a big delta.

Why the timing of virtual sessions matters

- Chunk presentations into 10-minute increments and keep sessions under 20 minutes. Why? Communication expert Nick Morgan says [that's the length of people's attention spans when in front of a screen](#).
- There's a good reason a [TED talk is under 18 minutes](#) - it's long enough to say something impactful but short enough to hold people's attention.

Here's a typical two-day, in-person PI planning event agenda, with 90-minute sessions:

| Time Zone ET | Day 1 Agenda | Time Zone ET | Day 2 Agenda |
|------------------|---|------------------|---|
| 8:00-9:00 am | Business Context | 8:00-9:00 am | Planning Adjustments |
| 9:00 - 10:30 am | Product/Solution Vision | 9:00 - 10:30 am | Team Breakouts |
| 10:30 - 11:30 am | Architecture Vision & Development Practices | 10:30 - 11:30 am | Final Plan Review & Lunch |
| 11:30 - 1:00 pm | Planning Context & Lunch | 11:30 - 1:00 pm | Program Risks |
| 1:00 - 4:00pm | Team Breakouts | 1:00 - 4:00pm | Confidence Vote |
| 4:00 - 5:00 pm | Draft Plan Review | 4:00 - 5:00 pm | If necessary: Plan Rework |
| 5:00 - 6:00 pm | Management Review & Problem Solving | 5:00 - 6:00 pm | Planning Retrospective & Moving Forward |

And here's a **remote agenda with 20-minute sessions, spread out over three days**. Why three days? For two reasons. One, you may have team members joining the event from more than one time zone and you want to be respectful of personal time. And two, when each session is only twenty minutes long you'll need three days to make sure you get to all the agenda items. You especially want to leave enough time at the end of the event for key ceremonies: the review of the final plan, the confidence vote, and any necessary rework.

| Zone 1 CDT | Zone 2 AEST | Day 1 Agenda | Day 2 Agenda | Zone 1 CDT | Zone 2 AEST | Day 3 Agenda |
|--------------|---------------|--|--|--|--|---|
| 3:00-3:20 pm | 6:00-6:20 am | Opening Introduction 10 MINUTE BREAK | If necessary: Team Breakouts (1 of 2) 10 MINUTE BREAK | 3:00-3:20 pm | 6:00-6:20 am | If necessary: Team Breakouts (2 of 2) 10 MINUTE BREAK |
| 3:30-3:50 pm | 6:30-6:50 am | Business Context 10 MINUTE BREAK | Team Synchronization 10 MINUTE BREAK | 3:30-3:50 pm | 6:30-6:50 am | Team Synchronization 10 MINUTE BREAK |
| 4:00-4:20 pm | 7:00-7:20 am | Product/Solution Vision 10 MINUTE BREAK | Draft Plan Review 10 MINUTE BREAK | 4:00-4:20 pm | 7:00-7:20 am | Final Plan Review 10 MINUTE BREAK |
| 4:30-4:50 pm | 7:30-7:50 am | Architecture Vision 10 MINUTE BREAK | Management Review & Problem Solving 10 MINUTE BREAK | 4:30-4:50 pm | 7:30-7:50 am | Program Risks 50 MINUTE MEAL BREAK |
| 5:00-5:20 pm | 8:00-8:20 am | Development Practices 10 MINUTE BREAK | Planning Adjustments 10 MINUTE BREAK | 5:40-5:20 pm | 8:40-8:50 am | PI Confidence Vote 10 MINUTE BREAK |
| 5:30-5:50 pm | 8:30-8:50 am | Planning Requirements 50 MINUTE MEAL BREAK | Planning Requirements 50 MINUTE MEAL BREAK | 5:30-TBD WHEN COMMITMENT IS ACHIEVED | 9:00-TBD WHEN COMMITMENT IS ACHIEVED | If necessary: Plan Rework 10 MINUTE BREAK |
| 6:40-8:30 pm | 9:30-11:30 am | Team Breakouts (1 of 2) Hourly Scrum of Scrums Checkpoints | Team Breakouts (2 of 2) Hourly Scrum of Scrums Checkpoints | 50 Minutes | 50 Minutes | Planning Retrospective & Final Instructions |

Schedule the 3-day event and make sure all invited team members secure the time on their calendars. Emphasize that while it looks like the event doesn't take up the entire day, it's important that people avoid adding other work to their schedules and encourage people to rest and take downtime away from their screens to recharge and ready themselves for the next set of items.



You may be tempted to schedule social video conference time after the day's work is complete. Don't. Encourage people to take time away from their computers and re-charge for the next day. Instead, try this fun, non-screen activity: Draw something on a post-it sized paper (a doodle, a joke, an idea) and upload it to a shared space. Or, have people take a selfie in their workspace and share it as part of an ice breaker the next morning.

Release content in advance so teams can prepare

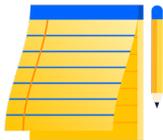
After you've designed the agenda and schedule, get started on developing content and release it to the teams in advance. Why? Because you don't want your virtual event to be a slog of talking head presentations. By giving your teams a chance to preview the materials, they can discuss the vision and plans with their leads and ask clarifying questions. They'll come to the virtual event ready to contribute and they'll be more engaged during the discussions and planning sessions.

Post these videos, decks, and documents in a shared space, preferably with commenting capabilities so people can post feedback and questions ahead of the event. Encourage the team leads to meet with their groups and review the content together so everyone is on the same page. This will make the virtual event easier to participate in, and more successful overall.

Video and documentation to post before the event:

- Executive briefing
- Product vision briefing
- Architecture briefing
- Product roadmap
- Top prioritized features

Once you have the agenda and schedule complete, conduct a dry run of the event, making sure leaders know how to facilitate each activity and how to use the conference and collaboration tools.



Pre-work tasklist to complete

- Confirm the dates for the event at least two weeks in advance
- Create the team and attendee list and send calendar invitations
- Procure all collaboration software and train teams
- Get stakeholder commitment on agenda
- Develop videos, documentation, and presentation content
- Post content; leads commit to review in advance
- Test facilitation and technical support in a dry run of the event

Drive teams to commitment with coordinated facilitation

There are two key aspects to facilitating a virtual PI planning event: facilitating the event itself, and managing the team breakout sessions. In both cases, start by establishing working agreements and basic rules for the entire release train team.

During the main sessions where everybody is on one video call (and in communications prior to the event) establish these ground rules:

- Everyone should arrive to the day's first session 15 minutes early to sort out connectivity issues and get settled in with their favorite creature comforts (a hot beverage, a full water bottle, snacks).
- Participants should join from a quiet area where they have control over the environment - no coffee shops or other public spaces.
- Everyone should be in a state of professional appearance so they can have their video on (at least most of the time), but have their microphone muted by default to cut down on background noise.
- Everyone needs to understand how to raise a question, either via a "raise your hand" feature, chat or collaboration page.

“ A lot of the content can be delivered in a shorter timeframe when we put more work in crafting the message and thinking about what people should take away, rather than just winging the session.

CHRIS SPANNER, JIRA ALIGN SOLUTIONS ARCHITECT

Working agreements encourage full participation

The success or failure of a PI planning event depends on the participation of all teams during all sessions. To participate in the best possible way, it's key for people to not talk over each other and use respectful communication. Since there are likely to be as many as 150 people in the main virtual sessions, it's important to define how participants get the attention of the facilitator to either ask questions, sort out issues, or contribute to a topic. This process is best kept simple and straightforward for all participants.

For example, if it's available, you could use the “raise hand” feature in your video conference tool. If your tool has a gallery view, ask participants to raise their hands physically or hold up a colored item to get the facilitator's attention.

Establishing some basic collaboration rules will help everyone enjoy a smoothly-run and structured event and ensure all participants get the most out of it.



Capture only essential information to complete the working plan. When you're capturing details and agreements in a session, complete what's necessary for people to come to a shared agreement, and leave the refinement for later. If it's available, get a transcription of your session to refer to when you're completing the input.



Scrum masters can ensure quality discussions and cross-pollination

When it's time for breakout sessions, the scrum masters can take over the facilitation of these smaller groups. It's still important for teams to self-organize and decide how they'll collaborate and capture decisions. Scrum masters can monitor the schedule, share information from other teams' scrum masters, and keep an eye on the collaboration channels for important input.

The scrum master can also appoint someone to capture information in the collaboration tools, or they can do this themselves. The focus should be on decomposing items, defining dependencies, and which teams need to commit to collaboration in certain sprints. Because people can't walk around the room and observe each other's work, all this information must be immediately available to other teams and stakeholders in the virtual planning event.

Encourage the scrum leaders at the planning event to meet separately and regularly in their own breakout sessions - the scrum of scrums - to share each team's progress, highlight any risks or conflicts, and make sure the evolving plans are coming together smoothly.

Tips for keeping people engaged throughout the event

- Take frequent breaks and keep people engaged through polls, games or physical activities such as stretches or desk yoga
- Enlist help – chat monitors (event, team, technical), time-keeper, transcriptionist for notes and action items
- Capture working agreements, contacts, communication channels, and other critical information in digital collaboration tools
- Coordinate how you plan to facilitate passing the ball for readouts to keep things flowing – you may want to practice before the actual event
- Learn to listen and remain engaged – it's easy to get distracted

Turn virtual PI planning into an organizational advantage

Planning and conducting a virtual PI planning event can help your executives, product leaders, and engineers sharpen their skills and set the next program increment up for success. While the planning overhead—and then the time commitment of the event itself—may seem onerous, the net benefit to the organization is teams will be able to execute more effectively than before. When travel isn't possible, using digital collaboration tools can help teams share information, facilitate decision-making, and serve as a single source of truth for the entire organization. With intentional planning and strong facilitation, your virtual PI planning session can yield the same good outcomes as an in-person Big Room event.

More tools and resources

Find more articles, plans, and checklists that will help you and your team plan a successful virtual PI planning event in the [Jira Align](#) section of the [Atlassian Community](#).

[Learn more](#) about how to manage risk and dependencies, track resource allocation, and track work across teams in real-time. Ready for a demo of Jira Align? [Get in touch](#).

