

Review this checklist to prepare for all aspects of Remote PI Planning several weeks before the event.

VIRTUAL ENVIRONMENT READINESS

- Research video conferencing tools and get input from Agile teams on their tool-of-choice
- Select a video conferencing tool that supports more than 100 attendees and provide additional functionality such as screen sharing, whiteboarding, and polling
- Set up virtual rooms for individual teams to collaborate during team breakouts, cross-team collaboration during scrum-of-scrums breakouts, and key stakeholders to reach decisions in the management review session
- Appoint a dedicated person to orchestrate and mediate technology during the event
- Document clear working agreements
- Document clear instructions on how to use tools employed
- Distribute tip sheet of working agreements and tool instructions with teams

ORGANIZATIONAL READINESS

- Organize a half-day Pre-PI Planning event with key stakeholders
- Prepare the business context, portfolio vision, and strategic themes presentation for day one
- Build the product/solutions roadmap and timeline for upcoming three PIs
- Define the architecture vision, improvements to development practices, and overall technology strategy for the upcoming PI
- Determine the top ten features for the upcoming PI, prioritized by WSJF
- Prepare facilitators on their roles and responsibilities
- Complete team and Agile Release Train rosters to show locations and contact information for all stakeholders
- Store all content in a central location that can be accessed by everyone involved

INFORMATION COLLECTION READINESS/VERSION ONE SET UP

- Create separate Planning Rooms, one for the ART, one for each individual team, one for the scrum-of-scrums breakout, and one for the management review session
- Share the event agenda, executive briefing presentation, and other relevant content as topics in the ART Planning Room.
- Document high-level business strategies in the Strategic Themes tab
- Use the Roadmap tab to visually represent the product/solution roadmap and key milestones at the portfolio planning level with associated Strategic Themes
- Apply filters to the Epic Backlog and/or Portfolio Tree so teams can focus on work slotted for the PI Planning event
- Display features ready for breakdown on the Feature Kanban Board at the ART planning level
- Assign features to teams based on their capacity
- Set planning guardrails for teams by having them establish feature points capacity