

Best practices to run a successful distributed PI Planning Event!



Introduction.

Individuals and Interaction over Processes and Tools is one of Agile's core values. However, there are times in which we have no other choice than to work from home. Can that work in an Agile way of working? How can we keep the benefits of the face-to-face interactions and collaboration while working remotely? A PI planning event is an event where everyone is collocated and working closely together to stimulate interactions and alignment and involves gathering around physical boards to stimulate collaboration. Can we still successfully organize these events with a remote workforce? The answer is yes!

In this paper we provide best practices for organizations who have no other choice than to organize their PI planning events remotely. For example, organizations with teams dispersed across multiple sites and who therefore always run their PI planning events in a distributed way, or organizations who have been forced to organize their events differently due to a particular event, e.g. the recent COVID-19 crisis.

The tips and tricks shared below are relevant for all situations in which people cannot come together physically for their PI planning event. Obviously, the level of complexity depends on the situation you are in. However, we believe no matter what the situation is, it is better to have a planning than to have no planning. Just go ahead, experiment, learn and grow!

Best practices for distributed / remote PI planning events.

Preparations.

1. Adapt the PI planning agenda to the remote set up. When you are dealing with time zone differences, organize a PI planning event for 2.5 days. Make sure that crucial parts of the agenda are held when everyone is able to join, at a reasonable hour for all (i.e. business and product vision, the plan reviews, management review). Reduce the morning program, because listening through lengthy presentations online can lead people to lose focus easily and you risk not getting the message across. One way to do so is to transform the presentations into 12-minutes-TED-talks to ensure engagement. Don't try to switch between screens, as it might impact the stability of the network. Make sure you present from one laptop. Additionally, give teams enough time to collaborate, which sometimes requires people to start early or stay late. Make sure that everyone compromises evenly. For complete remote PI planning events it is also recommended to extend the breakouts as it takes significantly more time for teams to plan online. Finally, schedule dedicated slots for teams to manage dependencies jointly. For example, extend the Scrum of Scrums and organize it twice per breakout.

2. Send out a PI planning event communication deck. This deck includes 1) the agenda, 2) a detailed script for the two days, 3) working agreements e.g. how to use conferencing tools, 4) video conferencing links to join the virtual breakout sessions of the teams and how to reach stakeholders, facilitators, Agile Release Train (ART) governance and Business Owners, 5) other relevant links to i.e. real life chats, Program Board, risk board, intranet, information on the SPOCs (single point of contact) of teams.

Working Agreements



- One conversation at a time
- Always be on mute when you are not talking to avoid background noise
- Only speak when you have a microphone
- Make sure everyone can participate
- Respect one another

3. Each team has a SPOC (single point of contact) to optimize efficiency. This is often the Scrum Master, but it can be anyone within the team. This person constantly checks and collaborates in the real life chat with the other SPOCs to create and align plans, manage dependencies and discuss risks.

4. Do a dry run with Scrum Masters, facilitators and Release Train Engineer (RTE). Organize a dry run to walk through the two days in detail by discussing the script and the communication deck. Additionally, explain how the collaborations tools can be used.

Logistics.

5. Test all audio and video systems prior to the event thoroughly. Make sure that technology works properly.

There is nothing more frustrating than finding out during the opening of your PI planning event that screens cannot be shared, or your audience cannot hear you. When using video conferencing ensure all participants switch on their camera's for optimal productivity, active participation and team spirit. If the infrastructure cannot handle this, other ways to ensure this is by having every team do a yell before you open the PI so that everyone knows they are there.

6. Prepare the virtual team breakout sessions elaborately. For each team a virtual room needs to be set up. Ensure that each team has a real life chat open. Breakouts are facilitated by Scrum Masters or dedicated facilitators. Cloud-based collaboration tools replace physical boards and needs to be set up before the PI. When some physical rooms are used you could consider using physical boards as well. In addition, (virtual) rooms should be created for stakeholders and Business Owners, ART governance and in which a Scrum of Scrums meeting can be held. When physical rooms are used make sure there is a permanent laptop set up in each room. This reduces possible issues arising from people connecting and/or disconnecting.

Facilitation.

7. Arrange dedicated facilitators and/or proxies of key roles for each location. Remote PI planning events require multiple facilitators who can assist at every location and/or in the multiple virtual rooms. In fact, the results significantly increase when each team has an online facilitator who activates the team and makes sure they are all engaged. A way to do this is to frequently mention their names and ask whether there are any questions. When distributed over 2 to 4 locations consider having a proxy for key roles such as the Release Train Engineer. When you do this, ensure to rotate the key roles across the locations each planning event, so everyone feels the benefit of having these people on hand once in a while.

8. Have multiple checkpoint meetings and a facilitator chat open. Progress made throughout the two (or more) planning days is not immediately visible in a remote set up. It is essential to have (more) frequent sync meetings where you discuss and immediately address progress, challenges and problems.

9. Use one tool to present the Plan Reviews. Switching between different people sharing its desktop can cause delays and technical problems. Try to minimize this by using one tool for the Plan Review presentations. Ask teams to write down their plans in this tool and have the Release Train Engineer share her or his desktop and facilitate between the different presentations.

10. Create a time schedule for Business Owners to check in with the teams and assign business value. In remote PI planning events, we still want Business Owners to engage with the teams frequently and score the PI objectives. Create a time schedule when the Business Owners will visit the teams on both days, either by joining the virtual breakout room or the physical room if they are onsite. Schedule a preparation meeting with all Business Owners in which you discuss the schedule and ensure they understand what is expected.

Tooling.

Real life collaboration tools are essential for successful distributed, remote PI planning events. These should be set up upfront, tested extensively and explained to everyone. Additionally, it is important to be very clear about the purpose of each tool. There are a variety of tools available. You should have at least:

- A tool where people can find and store relevant information (i.e. confluence, Sharepoint).
- Real life chats for at least each team, the Agile Release Train, facilitators, tool support (i.e. Microsoft Teams, Slack, Skype).
- Collaboration tools for team plans, Program Board, risk board (i.e. MIRO, Confluence, Kendis, Jira, Ren-Touch).
- A well working conferencing software which can manage >100 people (i.e. Zoom, WebEx).

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