

Running Effective PI Planning: A A Project Manager's Survival Guide Guide

Program Increment (PI) Planning is the heartbeat of the **Scaled Agile Framework (SAFe®)**. It's where strategy meets execution, where cross-functional teams align on a shared vision, and where dependencies, risks, and objectives are tackled head-on.

For project managers navigating the world of SAFe, mastering PI Planning is key to driving alignment and delivery across multiple Agile teams. This guide breaks down the process step-by-step and provides actionable tips to help you succeed in this intense, fast-paced, and transformative event.

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What Is PI Planning?



Two-Day Event

A cadence-based gathering where all Agile teams on an Agile Release Train (ART) come together to plan work for the next increment (typically 8–12 weeks).



Key Outcome

Alignment on business objectives, dependencies, priorities, and delivery plans across all teams in the ART.



Core Purpose

Define program objectives, identify team and cross-team dependencies, and plan and commit to the next Program Increment.



Key Participants in PI Planning



Project Manager's Role in PI Planning

Potential Roles

- Release Train Engineer (RTE)
- Observer learning Agile practices
- Coordinator managing dependencies
- Strategic Advisor ensuring alignment

Key Responsibilities

- Facilitating breakout sessions
- Managing risk and dependency tracking
- Supporting alignment between teams
- Translating strategy into execution

Value Added

- Cross-team coordination
- Visibility into dependencies
- Risk identification and mitigation
- Communication facilitation



Pre-PI Planning: Setting the Stage



Understand the Business Context

Get briefed on portfolio-level epics, upcoming features, and OKRs. Collaborate with Product Management and Business Owners to understand strategic goals.



Confirm Readiness

Ensure features are well defined, teams are staffed and available, and environments and tooling are prepped for collaboration.



Coordinate Cross-Team Dependencies

Work with Scrum Masters and POs to identify handoffs, integration points, and delivery overlaps.



Align Tooling and Logistics

Ensure digital tools are ready. For remote PI Planning, set up breakout rooms, timeboxes, and communication channels.





Day 1 Activities: Supporting Teams



Business Context

Help communicate the vision and priorities to all teams, ensuring everyone understands the strategic direction.



Team Breakouts

Assist teams as they estimate work, identify risks, and begin building their iteration plans for the upcoming PI.



Dependency Identification

Support teams in clarifying dependencies and risks, ensuring cross-team blockers are escalated early in the process.



Draft Plan Review

Coordinate with RTE, Product Managers, and Scrum Masters to review initial plans and address any alignment issues.



Day 2 Activities: Finalizing the Plan

Team Plan Adjustments

Support teams as they refine their plans based on Day 1 feedback and newly discovered dependencies. Help negotiate resources and timing when conflicts arise between teams.

Risk Management (ROAM) (ROAM)

Guide teams through ROAMing risks - categorizing each as Resolved, Owned, Accepted, or Mitigated. Help escalate blockers that affect multiple teams and ensure ownership is clear.

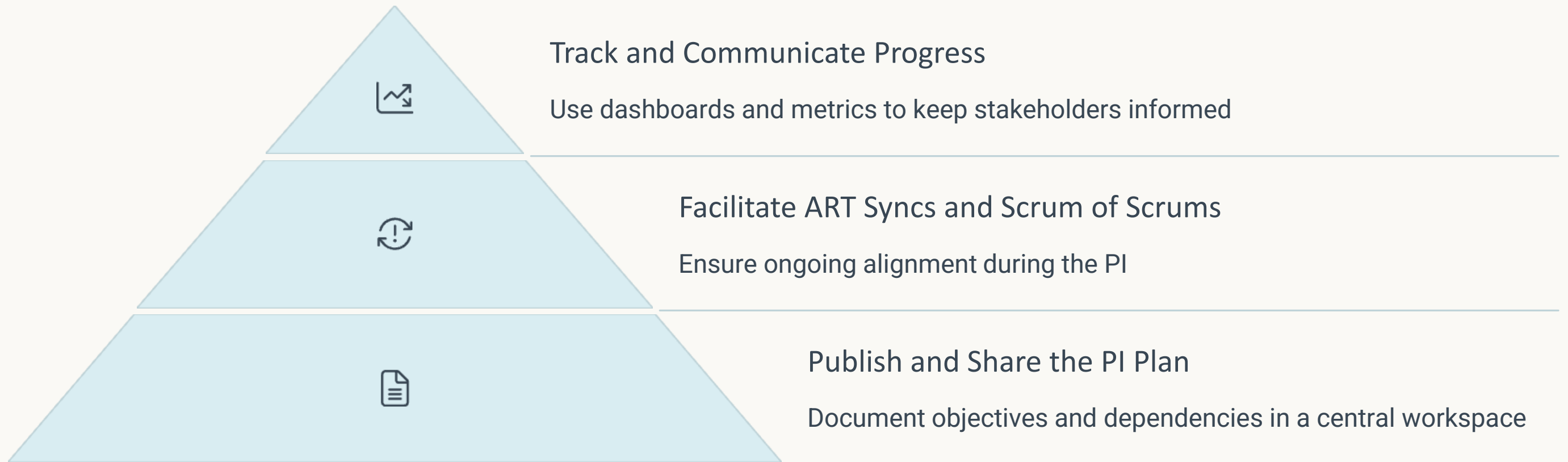
Confidence Vote

Facilitate the team confidence voting process, where each team indicates their confidence level in meeting their committed objectives. Address concerns from teams with low confidence scores.

Final Plan Review

Ensure each team's plan includes committed objectives, stretch objectives, and team confidence vote. Support the presentation of these plans to leadership and stakeholders.

Post-PI Planning: Driving Execution



After PI Planning concludes, your role shifts to execution support. Document all team objectives and dependencies in a central location like Confluence or Azure DevOps. Support the RTE in facilitating regular ART Syncs and Scrum of Scrums to maintain alignment throughout the PI execution period.

Continuous Improvement

Inspect
Review what happened during the PI execution against what was planned

Iterate
Apply improvements to the next PI Planning cycle



Adapt
Identify improvements to processes, tools, and approaches

Implement
Make concrete changes based on learnings

Participate actively in the Inspect & Adapt workshop at the end of each PI. Encourage honest feedback about what worked and what didn't during both planning and execution. Remember that PI Planning itself is an Agile process - each cycle is an opportunity to improve the event for next time.

Tips for Successful Facilitation



Timebox Religiously

Keep events on track with clear facilitation and scheduled breaks. Respect everyone's time by starting and ending on schedule, and be prepared to make tough calls when discussions run long.



Create Visual Clarity

Use online whiteboards or printed boards for shared understanding. Visual management helps teams quickly grasp dependencies and alignment issues that might otherwise remain hidden.



Foster Psychological Safety

Create an environment where teams feel comfortable speaking up about risks, issues, or blockers without fear of negative consequences or judgment.



Strategic Mindset for Project Managers



Think cross-team

Help identify and resolve blockers across boundaries



Focus on outcomes

Ensure everyone understands the value behind features



Facilitate, don't dictate

Lean into servant leadership to help others succeed

As a project manager in PI Planning, your greatest value comes from enabling others to succeed. Adopt a strategic mindset that prioritizes cross-team coordination and outcome-focused planning. Remember that your role is to facilitate the process, not control it - empowering teams to make their own commitments leads to greater ownership and accountability.

Common PI Planning Challenges



Dependency Overload

When teams discover too many cross-team dependencies, planning becomes complex and risky. Help teams identify the most critical dependencies and negotiate realistic delivery sequences. Consider suggesting API contracts or interface agreements to reduce tight coupling.



Distributed Teams

Remote or hybrid PI Planning introduces communication challenges. Ensure digital tools are accessible to all participants, establish clear communication protocols, and create dedicated facilitators for remote breakout rooms to keep everyone engaged.



Capacity Misalignment

Teams often struggle with balancing ambition and reality in their commitments. Guide teams to use historical velocity data when available, account for all non-feature work, and build in buffers for the unexpected to create realistic plans.

PI Planning Metrics and Success Indicators

85%+

Team Confidence

Average confidence vote across teams should be 8 or higher (on a scale of 1-10) for a healthy plan

90%

Dependency Resolution

Percentage of identified dependencies that have clear owners and delivery dates

75%

Objective Achievement

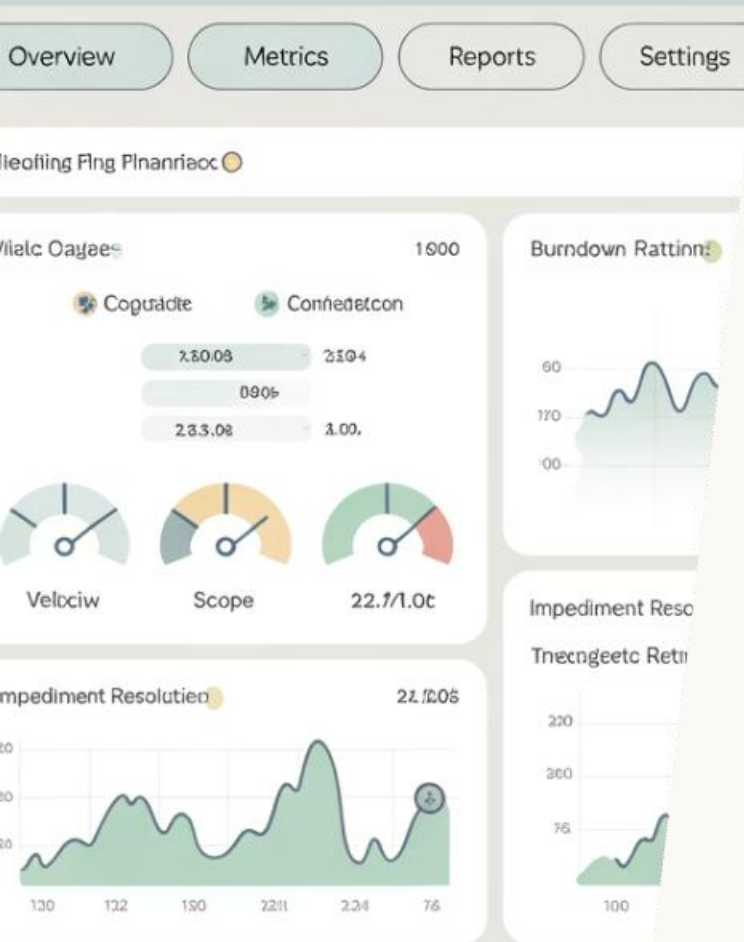
Target percentage of committed objectives completed by the end of the PI

100%

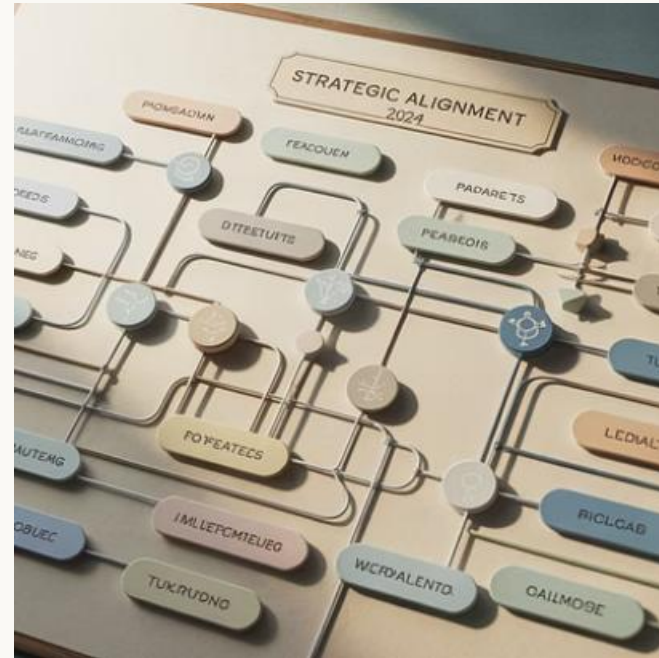
Risk Categorization

All identified risks should be properly ROAMed with clear ownership

Tracking these metrics helps gauge the health of both your PI Planning event and the subsequent execution. Low confidence votes or unresolved dependencies are early warning signs that should be addressed before finalizing the plan. During execution, monitor objective achievement to identify trends and improvement opportunities.



Final Thoughts: PI Planning as an Alignment Engine



PI Planning is more than just a meeting—it's a **powerful alignment engine** that fuels Agile delivery at scale. As a project manager, your organizational and facilitation skills make you an invaluable asset before, during, and after PI Planning.

Embrace your evolving role, support the Agile Release Train, and help turn strategic vision into synchronized execution. With each PI cycle, you'll build greater organizational agility and deliver more value to customers and stakeholders.