

# FIVE KEY LESSONS OF REMOTE PI PLANNING

By Claudia Caruthers

Programs from a global tier one financial organization take part in their first Global Virtual Program Increment Planning Session. Take 150 colleagues working from home, including ten Agile teams, over eight countries and across four time zones, join them together to plan what they will be doing over the next 12 weeks. Read on to find out whether it worked, after all, what could possibly go wrong?

## INTRODUCTION

- Program Increment (PI) planning facilitates delivery consistency in a service value system, promotes fast feedback and drives iterative and incremental growth.
- They are big events including all key people in a value stream (50+ people) and are usually held face to face. (See link to value stream [article](#)).
- The need for these events hasn't gone... So how do we run them successfully in a remote environment? Read on.

## BACKGROUND

January 2019, and the tier 1 financial organization had established their strategic program for building UK Transfer Agency (TA) as an offering and then on boarding the first client. Over 20 Capco resources worked on the program. We had already influenced the approach framework which was altered from waterfall to Agile in a bid to enable the Business Analysts (BAs), testers and developers, and give them flexibility to progress within two-week sprints. This was quite new for the client, and for such a large and significant program, it was all just a little bit scary to commit to such a change.

Before long, the pattern of the five Scrum ceremonies was established. The next step was to hold a PI planning session

which would enable the 12-14 pods to all get together in one place. They could plan their next six sprints, understand where there would be dependencies on each other, common blockers, encourage communication and establish commitments.

For many, the PI was an entirely new experience. These were two very long, intense and noisy days with over 100 people in one large room, dozens of whiteboards, post-it notes, sharpie pens, blue-tack, string and bowls of fruit and sugary energy snacks. To be truthful, there were also some rather bewildered looking senior managers. It was deemed successful and as a result further PIs were held throughout the build part of the program.

## THE CHALLENGE

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Fast forward two years to January 2021, and the UKTA Program has gone live and is now BAU. The next part of the TA journey is underway, to have a global TA offering and many of the original Capco resources remain in situ, their previous experience proving invaluable.

At this stage, a PI would be the best way to shape the next 12 weeks of work. However, how could we do that when the

key part of a PI is that we are all in one place together and the current global pandemic makes that impossible? The five Scrum Masters (four of whom are from Capco) and the Program Manager responsible for the build, set about making it happen virtually. In order to accommodate all colleagues, we would need to have Hong Kong, China, India, Poland, Luxembourg, Ireland and the UK all collaborating. Time zone challenges were just the first of the considerations.

## LOGISTICS

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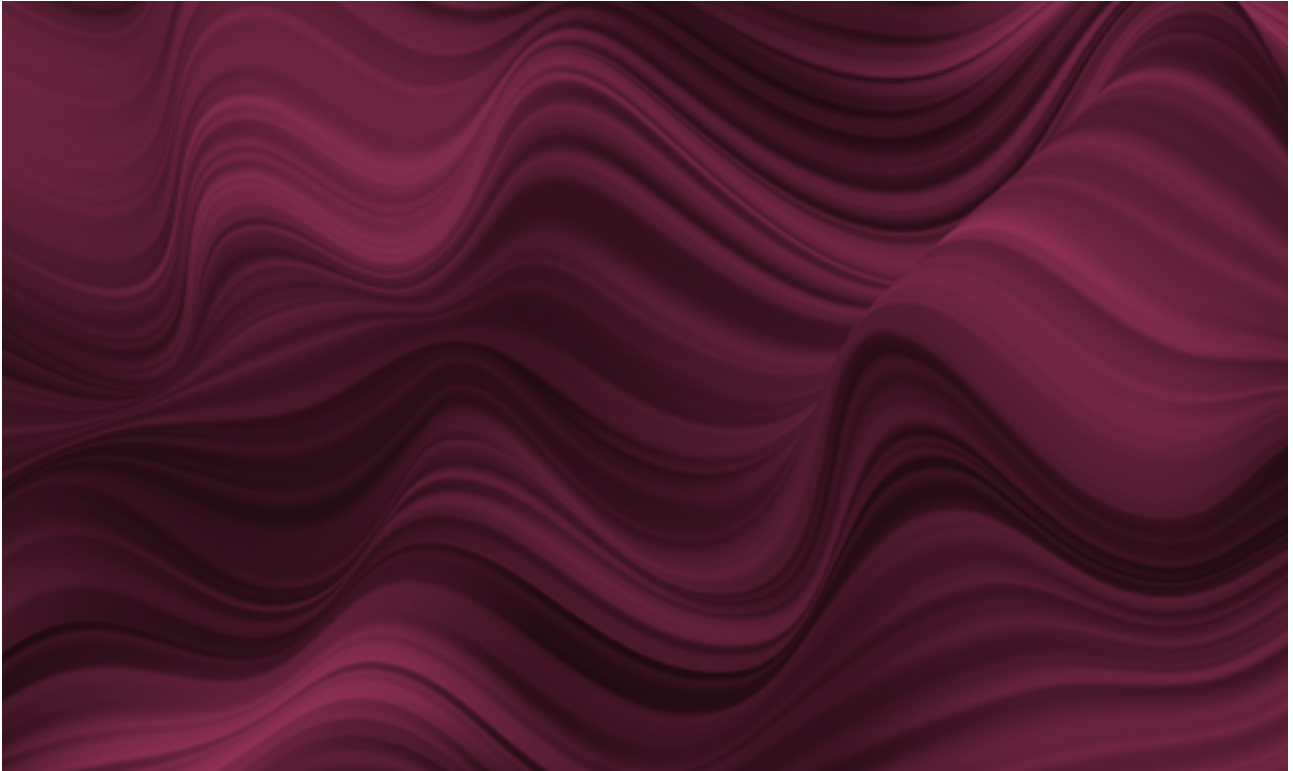
- We began the days at 17:30 to accommodate Asia-based colleagues and aimed to finish each day around lunchtime GMT.
- The PI was extended from two long days to three shorter days to ensure enough could be covered off.
- By using Zoom, we could open virtual rooms for each team and additional spare rooms for breakout discussions. There were approximately 20 “rooms” being used in total. Anyone could go to a different room via the main “atrium” to ask questions, see what was going on, or do a virtual floor walk. This would also be essential for the Scrum Masters and Program Manager who would spend their time amongst the various rooms.
- There were several test runs between the Scrum Masters to cover logistics and ensure everything would actually work in practice.
- A detailed deck was pulled together with a request for the pack to be “funky” to engage the audience.
- As a PI for the global TA function, it was appreciated that not all attendees would be familiar with each other's programs and so the first day included presentations from each of the Program Managers as to their program timelines, scope and current status.

## BREAKOUT SESSIONS FOR PLANNING

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Breakout sessions for each team were expected to fulfil the planning requirements, agree prioritizations where there are concurrent projects regarding resources and environments, identify and gather shared risks, issues, dependencies and

blockers. Not quite the same as the previous large piece of paper with swim lanes, peppered with post-it notes and bits of string demonstrating which items joined up; but it did work.



## REVIEWS OF OBJECTIVES

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Day Two focused on the review of each team's draft objectives. This took more time than anticipated, even though the Product Owners (POs) had been given a heads-up as to how long they would each have to present, some had included a lot more detail than others. It's harder to gauge a room's engagement when you can't read body language.

Day Three, the final day, proved essential as two teams had unexpected u-turns in terms of approach and with all the other attendees present, they had the best opportunity to reach out to colleagues for information and advice.

## WHAT WENT WELL

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In terms of what went well, opening the three days with Slido polls quickly caught the attention of attendees, got them immediately involved and proved useful in terms of setting the scene with how confident people were in the program completion dates, and whether the PI would be of value. The same questions were asked at the end of the PI to allow comparison. In addition, Slido remained open throughout for any questions to be asked through the presentations and as the days went on. Feedback confirms this was appreciated.

Other positives included having participation from the wider global offshore teams for the first time in the PIs, and the sense of complete transparency.

Objectives were reviewed constantly and as a result they were generally quite different by the end of the three days. This demonstrates the depth of the refinement that had been undertaken.

# FIVE KEY LESSONS OF REMOTE PI PLANNING

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- Logistics were set-up, tested, and tested, and tested again.
- The Scrum of Scrums struggled to effectively meet each day as the Scrum Masters were engrossed in various challenges and spread across different team rooms so corralling them into one place and time was impossible without prior arrangement.
- The POs found they stayed with their respective teams more and did not float around as much if this had been face-to-face. The introduction of a PO-sync in future PIs would ensure they take that time to come together as a group and it will be key to discuss inter-pod dependencies.
- Preparation took much more time than anyone had anticipated as it was crucial to have the main pack

right. There was collation and review of slides from the participating Program Managers, each team had to agree and submit their initial 12-week objectives, pages were established on Confluence ready to be filled with details, consideration was given to the optimum times for senior management reviews and who could attend which part of the days, Slido questions were written and practised and there was much discussion around “what ifs”.

- We missed having the end-of-day drinks which gives the attendees the chance to chat informally and park the more complex planning until the next morning. By finishing earlier in the day, the teams were able to take some time to themselves.

## IN SUMMARY

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Virtual PI planning can work and be effective, to such an extent that we question if this tier one financial client will ever again provide the budget required to have all attendees travel domestically and internationally to one central place for two to three days.

Overall, the PI was a success in terms of the logistics and in terms of bringing everyone together and facing into the

next five to six sprints. This was a new approach to PI planning even for those who are experienced and there are relatively few companies who have been brave enough to provide the support the Program Managers and the Scrum Masters were afforded. It is commonplace for financial sector companies to say they are working Agile but it is unusual for them to commit to this level.

For more information on Scaling Agile, please reach out to Capco colleagues [Michelle Weatherup](#), or [Sakib Amin](#).

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