

Free PI Planning Readiness Checklist

A practical before - during - after checklist for Release Train Engineers, project/program leaders, Agile teams and Business Owners.

BEFORE Prepare readiness	DURING Plan and align	AFTER Follow through
Business context Backlog Capacity Dependencies Architecture Stakeholders Tools & logistics	Shared context Technical guardrails Team plans Dependencies ROAM risks PI Objectives Confidence vote	Publish objectives Own dependencies Track risks Update tools Execution cadence Communicate outcomes Learn for next PI

How to use this checklist

1. Review the BEFORE checklist before the event and assign owners to every gap. 2. Use the DURING checklist as an execution control, not as a script. 3. Complete the AFTER checklist immediately after PI Planning so objectives, risks and dependencies move into delivery. 4. Use the readiness decision model below to make gaps explicit.

GO	CONDITIONAL GO	NO-GO / ESCALATE
Critical readiness conditions are satisfied.	Known gaps exist, but each has impact, owner and action.	A material gap prevents credible planning or timely decisions.

Note: GREEN / AMBER / RED is a TechTeamSynergy operational readiness model, not an official SAFe maturity rating.

Before PI Planning - Readiness Checklist

Business context and outcomes

- ☐ Business context is current and understandable
- ☐ Strategic priorities are clear enough for planning
- ☐ Expected PI outcomes are defined
- ☐ Decision-makers are available for important trade-offs

Typical owner	Business Owners / Product Management / RTE	Evidence	Shared business context, priorities, outcomes and decision availability
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Risk if missing: Teams can produce a coherent plan that is poorly aligned with business priorities.

Planning-ready backlog

- ☐ Priority features and enablers are visible
- ☐ Work is sufficiently refined for meaningful planning
- ☐ Major assumptions and constraints are explicit
- ☐ Initial sequencing is understood
- ☐ Known dependencies are already surfaced

Typical owner	Product Management / Product Owners / Teams	Evidence	Priority work, intended outcomes, constraints and initial sequencing
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Risk if missing: Breakouts turn into discovery sessions instead of planning and alignment.

Team capacity

- ☐ Planned leave and absences are included
- ☐ BAU / production support commitments are included
- ☐ Technical debt / infrastructure work is visible
- ☐ Shared specialist constraints are known
- ☐ Team membership changes are reflected

Typical owner	Agile Teams / Scrum Masters / Engineering Managers	Evidence	Realistic usable capacity - not theoretical headcount
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Risk if missing: Teams overcommit and the plan starts with unrealistic assumptions.

Before PI Planning - Readiness Checklist (continued)

Architecture and technical readiness

- ☐ Architecture direction is available
- ☐ Important enablers and NFRs are visible
- ☐ Platform / infrastructure prerequisites are understood
- ☐ Security / compliance constraints are visible
- ☐ Critical unresolved technical decisions are identified

Typical owner	System Architect / Engineering / Platform / Security	Evidence	Technical guidance sufficient for responsible planning
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Risk if missing: Teams build plans that later fail against known technical constraints.

Dependencies, stakeholders and logistics

- ☐ Known cross-team dependencies are identified
- ☐ External / vendor dependencies are identified
- ☐ Initial owners and required timing are known
- ☐ Business Owners understand expected participation
- ☐ Key stakeholders are available for decision windows
- ☐ Planning tools, permissions and breakout logistics are tested

Typical owner	RTE / Product / Teams / Stakeholders	Evidence	Dependency list, owner/timing, stakeholder availability, tested tools
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Risk if missing: Planning time is consumed by avoidable coordination and access problems.

Final readiness decision

Record the overall decision: ☐ GO ☐ CONDITIONAL GO ☐ NO-GO / ESCALATE

Critical gaps / owners / actions:

During PI Planning - Execution Checklist

Shared context and guardrails

- ☐ Teams understand the priorities and intended outcomes
- ☐ Important customer / business constraints are clear
- ☐ Architecture direction and technical guardrails are understood
- ☐ Teams know where meaningful trade-offs may be required

Typical owner	RTE / Product Management / Business Owners / Architect	Evidence	Teams can explain what matters, why it matters and what constraints shape planning
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Risk if missing: Detailed planning hardens around conflicting assumptions.

Team planning against real capacity

- ☐ Team plans use realistic capacity
- ☐ Priority work and enablers are included
- ☐ Sequencing is credible
- ☐ Major risks are surfaced
- ☐ Emerging PI Objectives are understandable

Typical owner	Agile Teams / Product Owners / Scrum Masters	Evidence	Capacity-aware team plans with visible risks and objectives
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Risk if missing: The plan only works under optimistic assumptions.

Dependencies and ROAM risks

- ☐ Known dependencies are confirmed
- ☐ New dependencies are surfaced quickly
- ☐ Provider, receiver, need, timing and owner are clear
- ☐ Material ART-level risks are ROAMed
- ☐ Owned / mitigated risks have active follow-up

Typical owner	Teams / RTE / Risk Owners	Evidence	Visible dependency ownership and risk treatment
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Risk if missing: The integrated plan fails even when individual team plans look achievable.

PI Objectives and final plan

- ☐ PI Objectives describe outcomes, not just backlog items
- ☐ Important uncertainty remains visible
- ☐ Committed / uncommitted classification is appropriate
- ☐ Major contradictions between team plans are resolved
- ☐ Integrated plan reflects dependencies and material risks

Typical owner	Teams / Product / Business Owners / RTE	Evidence	Coherent PI Objectives and integrated ART plan
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Risk if missing: Stakeholders cannot understand the intended outcomes or true confidence.

Confidence vote

- ☐ Confidence vote is completed
- ☐ Low confidence is investigated
- ☐ Plan is adjusted where necessary
- ☐ Unresolved concerns are visible and owned
- ☐ Confidence is reassessed after material changes

Typical owner	RTE / All participants	Evidence	A plan participants can credibly support
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Risk if missing: A high score is forced without addressing the underlying reason for low confidence.

After PI Planning - Follow-Through Checklist

Publish planning outputs

- ☐ Final PI Objectives are published
- ☐ Final changes are reflected in planning artifacts
- ☐ Stakeholders know where the latest information lives
- ☐ Unresolved assumptions remain visible

Typical owner	RTE / Product Owners / Teams	Evidence	One current source of planning truth
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Risk if missing: Multiple conflicting versions create confusion after the event.

Dependencies and risks into execution

- ☐ Dependency owners and dates are confirmed
- ☐ Owned / mitigated risks have active follow-up
- ☐ Escalation paths are clear
- ☐ Blocked items are visible in the delivery cadence

Typical owner	RTE / Teams / Risk Owners	Evidence	Active owners, dates and follow-up actions
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Risk if missing: Dependencies and risks are documented but not managed.

Execution cadence and communication

- ☐ Planning and delivery tools are updated
- ☐ ART coordination cadence is active
- ☐ Key decisions and commitments are communicated
- ☐ PI Objectives are reviewed during execution
- ☐ Lessons learned are captured for the next PI

Typical owner	RTE / Product / Teams / Leadership	Evidence	Updated tools, active cadence, stakeholder communication, learning actions
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Risk if missing: The event becomes disconnected from delivery and improvement.

PI Planning Readiness Scorecard

Dimension	GREEN	AMBER	RED	Notes / owner
Business				
Backlog				
Capacity				
Architecture				
Dependencies				
Risks				
Stakeholders				
Tools & Logistics				

Overall decision: ☐ GO ☐ CONDITIONAL GO ☐ NO-GO / ESCALATE

Decision rationale / critical actions:

Use the editable Excel workbook for the detailed readiness tracker, team capacity, dependency tracker, ROAM risks, PI Objectives and post-planning actions.