How to Prepare for a Pull Planning Session

1. To participate in pull planning effectively, you will need a high level understanding of the tasks you need to accomplish and the needs you will have from others. Homework will help you build that understanding in advance.
2. You should think through and list the major tasks in your workflow and their approximate time durations. Don't concern yourself with actual dates yet. Your tasks should be listed as outcomes or decisions, not efforts.
3. For each of your tasks, list what decisions or information you need from others to complete your tasks, and from whom. List these needs next to your tasks.
4. List your tasks and their needs backward from the final milestone, based on what you are required to deliver (conditions of satisfaction).
5. Be brief! Each task and its needs must fit on a small post-it note. The description should only be detailed enough to set out what you will accomplish using a verb and a noun.
6. Concentrate on your larger, higher level activities that are of interest to the other disciplines or have needs from other team members.
7. When the team meets, you will be asked to place post-it notes in your discipline's lane listing each of your tasks.

What to Expect at a Pull Planning Session

1. At the pull session, there will be a large wall containing a blank timeline like the one shown above. The team will use that timeline to understand and develop a plan designed to promote efficient workflow and rapid progress.
2. The timeline will be ordered initially by generic weeks. No attempt will be made to place the timeline in a calendar until the optimal flow of work is understood.
3. Each team member will be asked in create post-it notes in their color for each of their tasks they have identified.
4. Each team member, one at a time, will place its notes in their commitment lane on the wall in the weeks they believe support their workflow. They will not place commitments in other lanes initially.
5. After all team members have described their workflow, the team will discuss, negotiate, reconsider, reorder, break down and ultimately reconcile the various workflows to optimize the project-wide workflow.
6. To request something from another team member, a team member will prepare a note in its own color with the requested information, decision, or work product, and place it diagonally in the discipline lane of the other team member. This indicates that the note is still only a request and the performer has not accepted it as a commitment.
7. If the request is acceptable, a new post-it note can be prepared in the color of the team member who will produce the decision, information or work product.
8. The team will work its way through the plan, making requests, making commitments and adjusting the order of their activities.
9. Once all the activities have been committed to and are positioned vertically, the pull plan is complete.