FACILITATOR SCRIPT · VERSION 2.1

Timebox planning script

Words you can say, step by step, to run planning: the session where a team agrees what it will work on in the timebox (the fixed stretch of time we plan and work in; Scrum calls it a sprint). Use this script to foster clarity, ownership and collaboration in your planning sessions. Adjust it to fit your team's rhythm, and create a strong foundation for each timebox!

HOW LONG

45 to 60 minutes, plus 5 to 10 beforehand to prepare the room

The suggested timings in this script are designed for a team of ten or fewer, facilitated by a member of the team itself. Adjust accordingly. The quoted lines are suggestions: say them your way.

00 Prepare the room

5 to 10 minutes

Setting up the room or the virtual space can make a big difference to the flow and energy of your planning session.

1. **Arrange seating for engagement.** Set up a circular or U-shaped seating arrangement to promote open discussion. For virtual meetings, ask everyone to have their video on if possible, and encourage an uncluttered screen.
2. **Display the roadmap and backlog.** Make the roadmap and our list of things to do (the backlog) visible to all, on a large screen, a whiteboard or a shared virtual board. This keeps the focus on key items and helps the team align visually.
3. **Set up a task board.** Create a physical or digital task board to organise tasks as they are chosen, broken down and estimated. Label the sections (for example "Backlog", "In progress", "Done").
4. **Provide the necessary supplies.** In person, have sticky notes, markers and index cards ready for jotting down tasks and ideas. For virtual sessions, have a collaborative board set up (for example Miro, MURAL or digital sticky notes).
5. **Time-tracking tool.** Set up a timer to keep the session on track. Share it with the team at the start, so everyone knows how much time is allocated to each section.
6. **Create a warm environment.** Adjust lighting and temperature for comfort if you are in person. Begin with a short check-in or icebreaker to put everyone at ease, especially for longer sessions.

Once the room is set up, you are ready to guide the team through a smooth and focused planning session!

01 Set the stage

2 to 3 minutes

> **Objective.** Align on the session's purpose and the timebox goals.

> **Say.** *"Today, we're here to set our timebox goals and pull in the work we'll focus on. Our goal is to have a clear, actionable plan to deliver value by the end of this timebox."*

> **Then.** Encourage questions or thoughts on the timebox's high-level goals before moving on.

02 Review the roadmap and vision

5 minutes

Objective. Ensure the team understands the broader context and purpose.

Say. *"Let's take a quick look at our roadmap and our timebox vision. Are there any changes, risks, or feedback from the last timebox that might affect our focus this time?"*

ADAPT If new insights emerge, allow the team to discuss how they might affect the current timebox.

03 Backlog review and task selection

15 to 20 minutes

Objective. Let the team pull in items aligned with the timebox goals.

Say. *"Now, let's pull in items from the backlog that will help us achieve our timebox goals. Remember, these are items you think are feasible within our timebox."*

Then. Remind the team to choose items themselves rather than waiting to be assigned tasks.

ADAPT If the team hesitates, encourage them to voice any concerns about the size or complexity of certain items.

04 Task breakdown

10 to 15 minutes

Objective. Break down larger backlog items (the what) into smaller, manageable tasks (the how).

Say. *"For each item, let's break it down into smaller tasks that can be completed within a few days. Our aim is to make each task clear and achievable."*

Then. Guide the team to split up tasks, aiming for simplicity and clarity.

ADAPT If the team struggles to break down a task, offer questions like *"What's the first step we can take on this?"* or *"How could we test this?"*

05 Define "ready" and "done"

5 minutes

Objective. Agree what makes a task "ready" and what it means for it to be "done".

Say. *"Let's clarify what 'ready' and 'done' look like for each task. When we say a task is 'ready,' we mean it's clear enough to start. When we say it's 'done,' we mean... [insert agreed definition]. Does everyone agree?"*

Then. Encourage input and make sure everyone has a shared understanding.

ADAPT Adapt the definition of "done" to your team's process.

06 Estimation and feasibility check

5 minutes

Objective. Allow the team to estimate and confirm that the workload is manageable.

Say. *"Let's go through each item quickly and assess our confidence that these items can be completed within our timebox. If not, we may need to refine them or break them down further."*

ADAPT If your team uses a specific estimation technique, such as T-shirt sizing (small, medium, large), guide them through it. Otherwise, keep estimates as simple time forecasts.

07 Wrap up with a quick review

2 to 5 minutes

> **Objective.** Final alignment on priorities, and team ownership of the plan.

> **Say.** *"Before we close, let's quickly review what we've committed to. Do we all feel confident in our timebox goals and workload? Any last thoughts?"*

> **Then.** Emphasise that the plan is flexible, and encourage openness to adapt as needed.

`ADAPT` If there are concerns, discuss them briefly and agree any adjustments.

08 Closing

1 to 2 minutes

> **Objective.** Close on a positive and reinforcing note.

> **Say.** *"Great work, team! We've got a clear path forward. Let's tackle our timebox with focus, and remember to stay open to new insights along the way. Thanks for everyone's input!"*

> **Then.** Emphasise staying aligned during the timebox itself, and reaching out where support and collaboration are needed.

When a few voices dominate

Thank them and then redirect: *"Thanks, let's hear other perspectives."* For a discussion that runs on: *"Let's take this one outside the room if it concerns only a few of us."* Consider noting the unhelpful patterns you see (anti-patterns) and working out solutions together, as part of continuous improvement.

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