Worksheet: Improve Your Refinements with AI and SEA

A practical guide to reflect on how your refinement works today and how to turn it into a more valuable, less bureaucratic, and more decision-oriented conversation.

Who is this worksheet for?

This worksheet is for teams that do backlog refinement and want to explore how AI can help them. It also proposes incorporating SEA - Strategy, Empathy, and Adaptability - as a guide to turn refinement into a more useful conversation for understanding the product, the users, the context, and the decisions that need to be made.

Part 1: Diagnose Your Current Refinement

1.1. How would you describe your refinements today?

Mark the statements you recognize in your team.

Reflection

Which three statements best describe your team?

-

-

-

What does this tell you about your refinement?



1.2. Refinement or bureaucracy?

Think about your last 3 refinement sessions.

Answer honestly.

Question	Yes	No	Notes
Did we understand the problem better after the conversation?	[ ]	[ ]	
Did we question whether the story was worth doing?	[ ]	[ ]	
Did we talk about different types of users or stakeholders?	[ ]	[ ]	
Did we identify risks, dependencies, or important context?	[ ]	[ ]	
Did we leave with clearer decisions?	[ ]	[ ]	
Did we estimate before understanding the story well enough?	[ ]	[ ]	
Did we treat the ticket as if filling in the estimate was the main goal?	[ ]	[ ]	

Reflection

Where do you see the biggest risk today?

Part 2: Choose a Real User Story

Choose a recent or current user story.

User story

Title:

Current description:

Current estimate, if any:

Why did you choose this story?



Part 3: AI-Ray of the User Story

AI should not replace the team's judgment.

But it can help make assumptions, risks, and gaps visible.

Use this prompt with your user story:

> Act as an Agile Coach and Product Thinking Partner. Analyze this user story and identify:
>
> 1. Hidden assumptions
> 2. Questions the team should ask
> 3. Possible risks
> 4. Affected stakeholders
> 5. Dependencies or context we might be ignoring
> 6. Signals that this story is not refined enough yet
>
> User story: [paste the story here]

AI-Ray results

Hidden assumptions

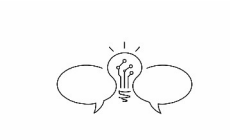
Important questions

Possible risks

Affected stakeholders

Ignored dependencies or context

What surprised us?



Part 4: SEA Reflections

SEA helps the team avoid stopping at “more information.”

It helps give direction to the conversation.

4.1. Strategy: is this worth doing?

Strategy is the voice that asks: Why are we doing this?

What real problem is this story trying to solve?

What evidence do we have that this problem matters?

What would happen if we did not build this story?

Is this story a solution or a need?

Possible alternatives

Ask AI:

> For this user story, suggest possible alternatives to the proposed solution. Include product options, technical options, operational options, and options that do not require building anything new.

List the most interesting alternatives:

Strategic decision

After this reflection, what do you think?



4.2. Empathy: who is really affected?

Empathy is not just about thinking about “the user.”

It is about understanding the ecosystem of people affected.

Who is the primary user?

Who else is directly or indirectly affected?

Stakeholder	What do they need?	What could they suffer?	What would matter to them?
1			
2			
3			
4			
5			
6			

Empathy prompt

Ask AI:

> Act as different stakeholders by this user story. For each role, explain what they would value, what might concern them, and what questions they would ask in refinement.

Which perspectives had we forgotten?

Is there a risk of an empathy trap?

The empathy trap happens when we optimize too much for one person and create pain for the rest of the system.

Main empathy trade-off

What trade-off between affected people or groups do we need to make visible?

4.3. Adaptability: what context could change the decision?

Adaptability is the voice that asks: What are we missing?

Known context

What do we already know about this story?

Unknown context

In which areas do we still have doubts that could be important?

Contextual risks

Mark the risks that could apply.

Adaptability prompt

Ask AI:

> Given this user story, identify contextual risks we might be ignoring: dependencies, previous attempts, security constraints, data ownership, operational impact, support implications, release constraints, and existing features that could change the best decision.

Which risks should we validate before continuing?

What context question could completely change this story?



Part 5: Slicing with SPIDR

A smaller story is not always a clearer story.

SPIDR helps split stories with more intention.

SPIDR prompt

Ask AI:

> Split this user story using Mike Cohn's SPIDR:
>
> - Spike
> - Path
> - Interface
> - Data
> - Rules
>
> For each possible slice, explain:
>
> 1. What we would learn
> 2. What risk it reduces
> 3. What value it delivers
> 4. When it would be a good first slice

Slicing options

SPIDR type	Possible slice	What would we learn?	What risk does it reduce?	Value
Spike				
Path				
Interface				
Data				
Rules				

Which slice would you choose first?

Why?

What should we NOT build yet?



Part 6: From Estimation to Judgment

Estimation can be useful.

But an estimate is not the same as refinement.

Before estimating, review whether you have enough clarity.

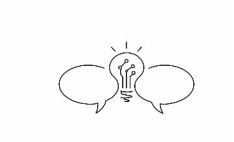
Thinking quality checklist

Question	Yes	No	Not yet
Do we understand what problem the story solves?	[ ]	[ ]	[ ]
Do we know why it matters now?	[ ]	[ ]	[ ]
Have we considered alternatives?	[ ]	[ ]	[ ]
Do we know who is affected?	[ ]	[ ]	[ ]
Have we identified the main trade-off?	[ ]	[ ]	[ ]
Have we identified important risks?	[ ]	[ ]	[ ]
Have we reviewed dependencies and context?	[ ]	[ ]	[ ]
If the US is large, which slice would make most sense to start with?	[ ]	[ ]	[ ]
Do we have a clear decision?	[ ]	[ ]	[ ]

Now yes: estimation

After this conversation, how has your estimate changed?

Why?



Part 7: Refinement Improvement Plan

Now reflect on your refinement process, not just on this story.

What should we start doing?

What should we stop doing?

What should we continue doing?

One concrete improvement for the next refinement

Choose only one action.

Team commitment

In the next refinement we will try:

We will know it worked if:

Part 8: Final Questions for a Retrospective

Use these questions after trying this approach for 2 or 3 refinement sessions.

What has changed in the quality of our conversations?

Which questions generated the most value?

Where did AI really help us?

Where did AI create too much noise?

At what moment did the team contribute the most human judgment?

What risk do we have of turning refinement back into bureaucracy?

Visual Summary of the Worksheet

A useful refinement does not end only with an estimate.

It ends with more clarity.

Strategy helps decide whether it is worth doing.

Empathy helps understand who is affected.

Adaptability helps see the context that could change the decision.

AI can generate questions, options, and risks.

But the team still has to do the most important part:

think, judge, and decide.

AI expands the conversation. SEA gives it direction.