

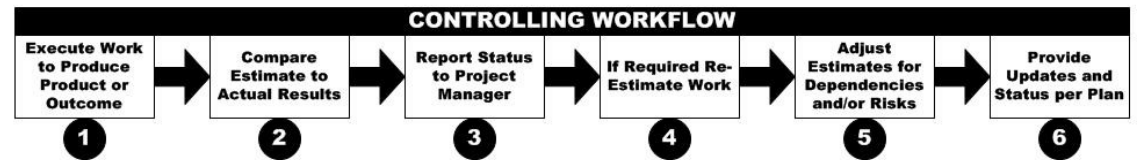
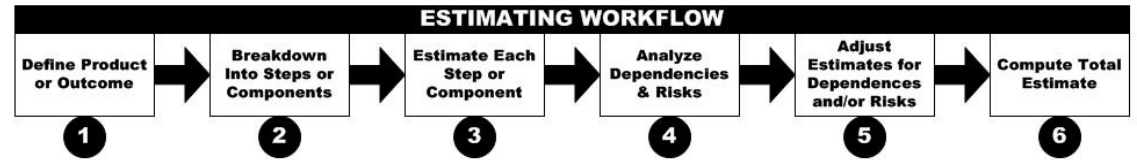


# Estimating and Controlling Work

## A Quick Guide for Non-Project Managers

### WHAT

- Purpose** To provide non-project managers with basic knowledge for estimating work to be accomplished in support of a project.
- Key Concepts** A project's purpose is to produce an outcome, which can be in the form of a product or end state.
- Estimating** The process of determining the work required to produce a specific outcome or product.
- Controlling** Comparing the original estimate (the plan) to actual results and communicating the status to the project manager.



### CRITICAL SUCCESS FACTORS

- Well defined outcome or product that can be measured. Includes acceptance criteria.
- Estimate(s) provided by resources who will be performing the actual work (or from known metrics from previous, similar projects.)
- Scope and complexity of outcome or product identified, including any dependencies, risks, etc.
- Estimates are supportable; i.e., the reasoning behind them is documented and makes sense.
- Status of work is determined and reported at least weekly.
- Status assessments that indicate work will not be completed per estimates are immediately reported with proposed remedies.
- Status should include (1) Work performed prior week, (2) Actual work completed, (3) Deviations from estimate, and (4) Work planned coming week.

### HOW

#### ESTIMATING

1. Include all attributes of outcome or product, including acceptance criteria.
2. Example: Outcome: transition of manual form to automated digital form. Steps: (1) Validate requirements, (2) Design data model, (3) Develop input validation criteria, (4) Develop digital form, (5) Test & Deliver.
3. Estimate work effort for (1) through (5) (Example)
4. Determine if there are dependencies; i.e., any steps or components that depend on the completion of other steps or components. Also note any risks such as resource constraints, whether or not work is requires specific skills, etc.
5. Adjust estimates based on (4) above.
6. Tally the time required to complete all of the steps (or components).

#### CONTROLLING

1. Commence work per project plan. Based on estimates provided will have scheduled start and completion dates.
2. As work progresses compare actual time to complete versus estimated time to complete.
3. Report status, including differences between actual work effort and estimates upon which the project schedule is based.
4. Re-estimate work in which the actual time and resources required to reach the defined outcome differ from the original estimates. Depending on how the project is managed and business priorities the scope of the work may be adjusted by the project manager.
5. Adjust re-estimated work to account for any new dependencies and/or risks.
6. Provide status in accordance with project requirements, including any escalation or communication plans. See Critical Success Factors.