IMPLEMENTING AN ESTIMATING PROCESS

"Determining the size of system functionality and measuring the performance of project teams is the basis of successful projects."

Introducing a process, a method and a technique is in many ways comparable with the introduction of a new or enhanced information system. The IT project brings together software, hardware, infrastructure, organisation and people. The project is structured with stages for development, transition to support, run & maintain and implementation. Why not apply the same structure to implementing an estimating process. The estimating process, described in an earlier document in the series, which will be implemented, does not require an estimating tool. However, when the process is in place, a professional software estimation solution such as SEER for Software and SEER for IT, definitely will contribute to quality, performance and consistency.

Steps of the implementation project:

Step	Description
1	Preparation
2	Assessment and Planning
3	Implementation
4	Operation

Preparation

This step can be seen as the start-up of the project. The focus for the initiation is to define the problem space and to agree the organisational area into which the solution will be initially implemented. During the meeting the scope and the possible solution space are outlined and key staff identified. The solution space and the scope will be the reference for the assessment in the next step. The key staff (stakeholders and/or participants) should be able to provide input to detail the wanted situation, have knowledge of the current processes and/or the organisation culture. The output of the initiation is an initial plan for the assessment.

Assessment and Planning

Based on the agreement the current situation will be 'assessed' reflecting the issues raised and included in the preparation. Possible activities are:

- identifying major development process(es)
- Identifying major development platform(s)

- analysing the project phases
- evaluating of the estimating process(es)
- analysing mapping of schedule and estimates
- determining the activities per phase;
- determining the deliverables per phase
- evaluating the time writing process
- determining the work allocation breakdown;
- evaluating the data collection process
- describing the common project organisation
- making an overview of the used procedures
- identifying used standards and methods.

The assessment is executed using the agreed upon solution space and the implementation approach MOUSE that is described later in this document.
Based on the result of the analysis and the final scope, the implementation plan is created. This main deliverable describes the transition from the current state to the wanted situation. In addition to the drawing of the current state (including findings and recommendations) and the wanted situation, the plan includes:
- the necessary changes
- per change item the transformation
- the identified training needs
- an awareness / communication program
- the agreed upon base data collection set
- possible pilot and research projects
- required staff and roles in implementation

All in balance and direct related to people, process, procedures, people, organisation and data (collection).

Implementation

The implementation includes all activities to prepare the organisation for the translation to production of the metrics program. All the items of MOUSE indicated in the plan have to addressed and formalised in process, process, people and data. The data collection set will be defined and validated using the Goal-Question-(Indicator)-Metric [GQ(I)M] paradigm.

The activities will be executed as agreed in the proposal. In addition to scope and size of the implementation (locations, people and setup), the cost for implementation depends very strong on the activities performed or participation in the implementation by the organisation. The implementation effort can vary from a limited number of days (small unit) to many months (large global operating organisation).

Therefore the advice to start small and roll out when stabilised. Initial implementation cost in a nominal setting should be between 2 - 3 % of the annual (unit) IT budget.

Operation

The operation is similar to run & maintain of applications. The effort needed to support the organisation depends on the implementation. It also depends on numbers of users / projects, reporting and governance, defined analysis, tools, project management support and improvement initiatives. An indication of cost based on experience; 1 – 2 % of the annual project budget.

Part of the operation is a regular check (at least once a year) of the scope and needs.

MOUSE

This standard approach is based on many years of experience implementing estimation processes and metrics program. It identifies five activity groups and in these groups a number of activities that have to be addressed in scope definition, implementation and operation. It's used as a reference in the assessment and the creation of the implementation plan.

Market View	Operation	Utilisation	Service	Exploitation
Communication	Application	Training	Helpdesk	Registration
Evaluation	Review	Procedures	Guidelines	Control
Improvement	Analysis	Organisation	Information	
Investigation	Advice		Promotion	

A full paper is available on MOUSE. In this sheet some highlights in each group are given to give a flavour of the approach.

Market view
Align or better participate in international communities on estimating, measurement and benchmarking that can help to support and improve your practises. It's also easier to keep track on latest developments.

Operation
Implement review steps to ensure quality:
- correct measurement and use of metrics
- applicability of the process
- to keep it fit for purpose in a constantly changing organisation

Utilisation
In addition to the experts, train also the employees, project managers, management and customers. It will have impact on their way of working and communication.

Service
Don't forget to show and communicate the results of the implemented process. This will keep the suppliers of data motivated to continue measuring

Exploitation
Guard the data as a valuable asset. Collect, store, analyse and supply data according predefined structures.

Tools

Although a tool is not required to implement an estimating process, it definitely supports the application of the process and the acceptance. The added value of a tool is described in a separate sheet in this series.

The benefits at a glance

A structured implementation of an estimating process gives:
- a complete implementation
- a tailored and optimised process
- an appropriate knowledge level
- an optimal organisation
- a fit for purpose metrics program

Galorath and Estimating

Estimating is the core business of Galorath. Over the years Galorath has gained a lot of experience in estimating. This is reflected in the SEER suite and the support organisation. Galorath and associated partners do have a standard approach, known as MOUSE, to embed the estimating process (with or without a tool) in the organisation and to train the employees.

Like to know more?

We would like to tell you more about Estimating, SEER and related subjects. You can contact one of our consultants for a talk without any obligations. Just send an email to pi@galorath.com.

On www.galorath.com you will find a more extensive overview of the possibilities and services Galorath offers.

The paper "Implementing a Metrics Program: MOUSE will help you" can be downloaded for free from the Galorath website.

Estimate | Analyze | Plan | Control