

Checklist: *Building Your Estimation Layer*

Estimation modernization does not require a full system overhaul, but it does require structure.

Use this checklist to assess readiness, identify priorities, and begin laying the foundation for an integrated estimation layer that supports real-time planning and long-term confidence.

Action Items

☐ **Audit your current estimation landscape:**

Identify where estimates are created, stored, shared, and updated. Track which functions rely on spreadsheets and where handoffs break down.

☐ **Map integration points:**

Determine where estimates should flow – into sourcing systems, proposal tools, dashboards, or program plans – and identify gaps in connectivity.

☐ **Assess version control and traceability:**

Ensure teams can track changes, validate inputs, and explain assumptions to both technical and non-technical audiences.

☐ **Prioritize explainable AI and parametric logic:**

Choose tools that show how outputs are generated, support adjustments, and reflect domain-specific realities.

☐ **Align your stakeholders:**

Bring engineering, finance, program, and procurement leaders together to define shared success metrics for estimation.

☐ **Plan for adoption, not just deployment:**

Assign internal champions, budget for training, and prepare for process alignment – not just software configuration.