



How Changing our Estimation Process
Took our Project Endgame from
WTF? to FTW!



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Presented by:

Ashleigh Thevenet
Project & Transition Manager
@Bluespark

ashleigh@bluespark.com

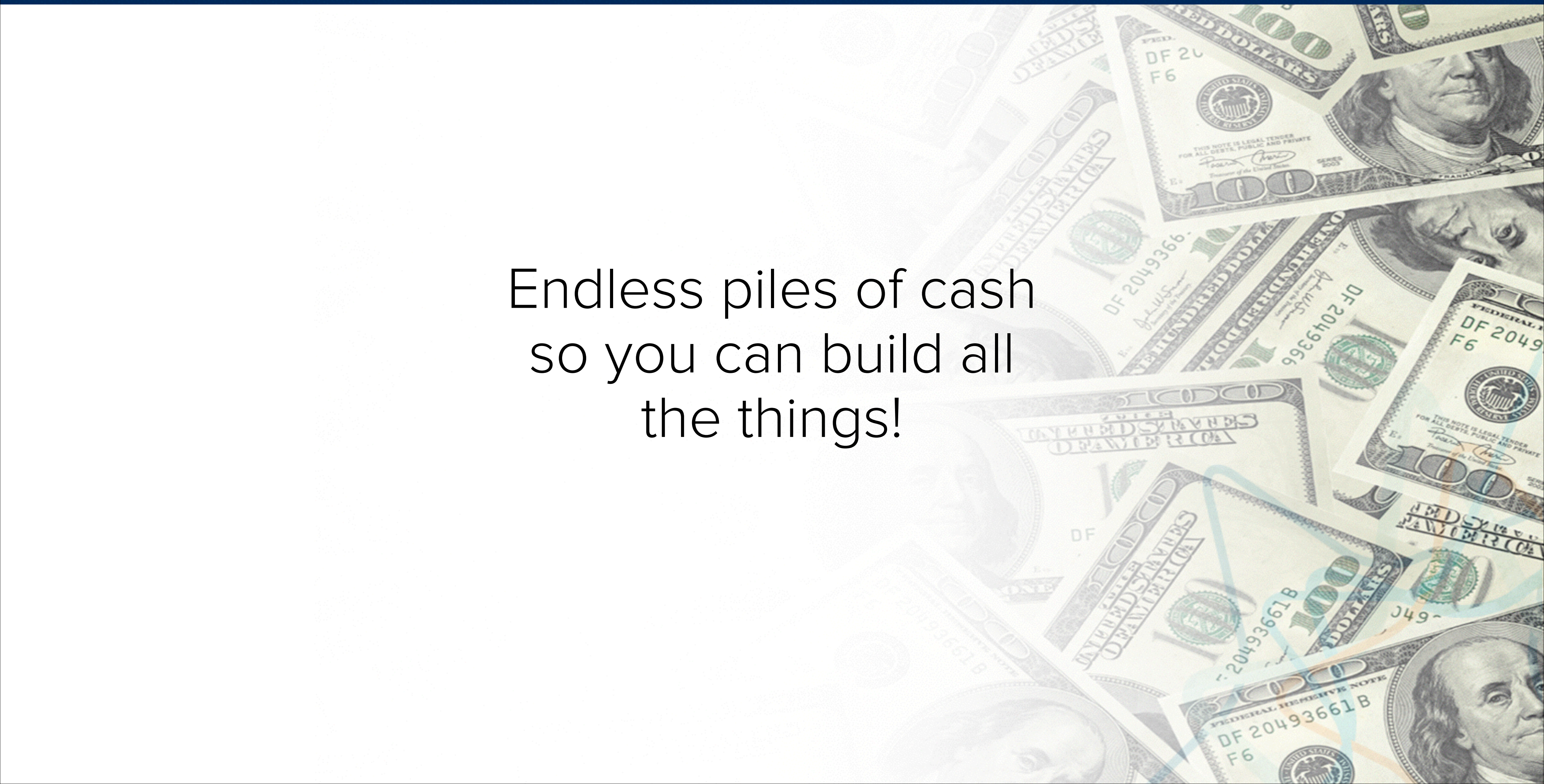
The Ideal Project Budget





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Endless piles of cash
so you can build all
the things!



Fixed Bid Realities



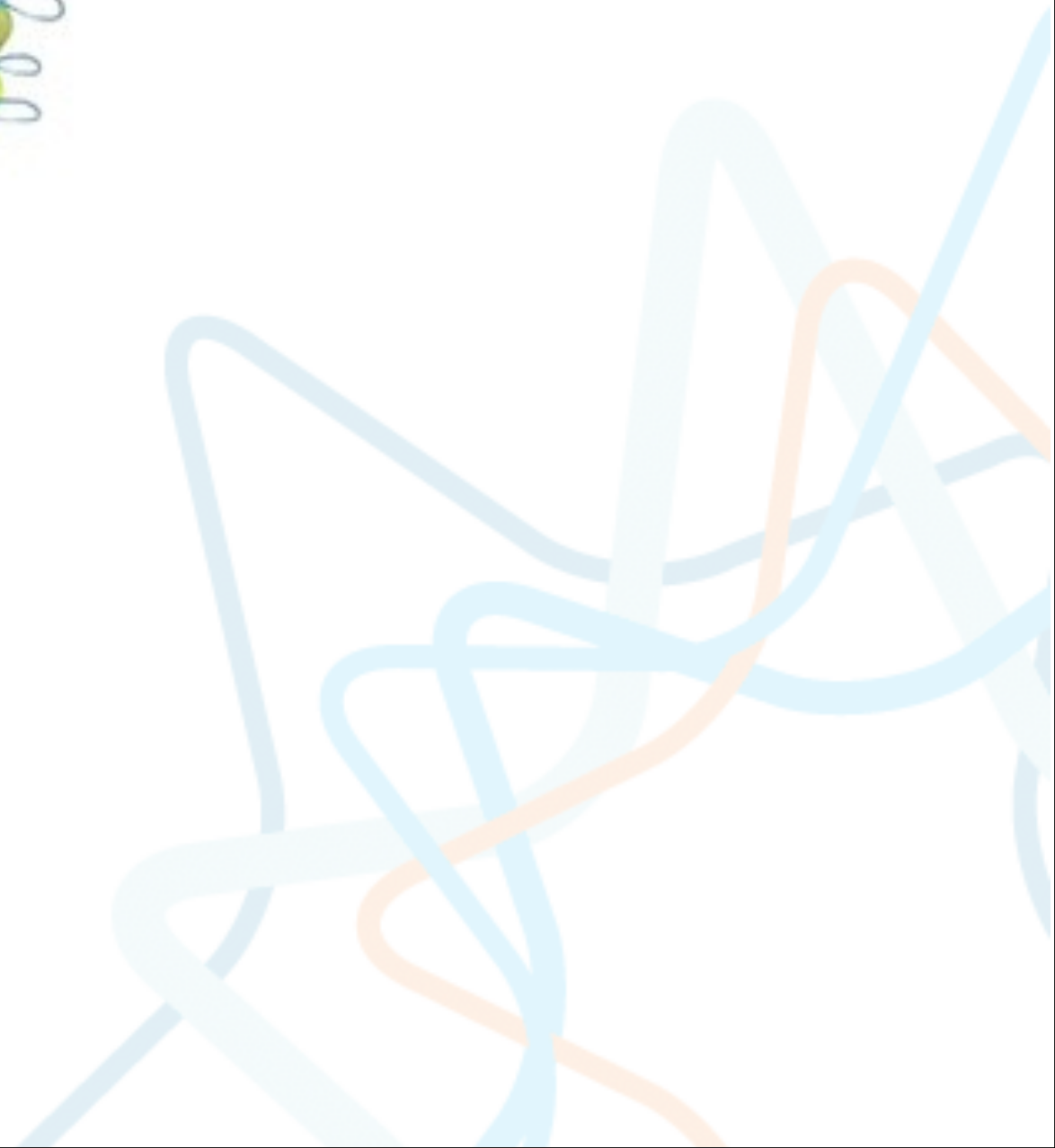
The real budget:



(and not a penny more).

RFP Estimate Doom

RFP + Detailed Estimate =



So you receive an RFP...

Artists

- Artists who are looking to apply should be able to easily find out about the prospectus and be able to apply and upload images to the site.
- Multiple prospectuses for submission should be available.
- Artists who are juried into the competition should be able to see schedule information and will be able to see schedule information that is unique to the juried artists.
- Artist galleries from previous years should be available.

Visitors

- Visitors should be able to see previous galleries as well as see current year's artists bios.
- Will be able to see content objects with general information about the festival.
- Will be able to purchase tickets for events.
- Will be able to clearly understand the programming that is involved. (Events occur in many locations and at many times.)

Press

- Will have access to:
 - Current and historical press releases
 - Radio and television stories
 - Print articles
 - Video B-roll clips
 - Video blogs and other finished content
 - Photography stock

Volunteers

- Will be able to express interest in working on and to describe their interests, time limitations, and availability.

Website

- The site back-end must be easy to use for site admins. Staff and volunteers should be able to supply the content and upload the information in a timely manner.
- The search function should be robust across multiple taxonomies. Examples of taxonomies include: content types, user types, e.g. artists (with subcategories), visitors, press, volunteers; tags, e.g. 2012, John Doe, grand prize, watercolor.
- Search results will be presented in a clear and concise manner. A finger hovers over the subject a descriptive sentence will appear with a link button that takes the user to a full detail subpage.
- A "Shopping Cart" for tickets, donations, artists registrations with a follow up confirmation reply to be sent to purchaser/registrant.
- Site design will incorporate responsive design in order to deliver content to mobile users without additional site development.

Annotations:

- Application process
- Event management with attachments
- Online selection process of user submissions
- Galleries
- User bios
- Event ticket purchasing
- Blog with archived articles, videos, audio clips, images..
- Contact web form with multiple required fields
- Ease of use for site admins
- Robust search across multiple taxonomies, content and user types
- Graphic and dynamic search results
- E-commerce with multiple product types
- Oh, and responsive design

And surprise, it includes all the things!

And of course, the budget for this is...



(and not a penny more).

You put together your proposal and attach a budget

Estimated Budget Worksheet

DISCOVERY		PLANNING		DESIGN		DEVELOPMENT		TRANSITION	
Creative		Creative		Creative		Creative		Creative	
Interviews	8	Design Style Tiles	24	Site Style Guide	16	Design Support	8	Final Review	4
Creative Brief	4			Site Design	24	Theming	32		
User Experience		User Experience		User Experience		User Experience		User Experience	
Interviews	8	User Req's and Wires Peer Review	24	UX Support	4	UX Support	4	Final Review	4
UX Brief									
Technical		Technical		Technical		Technical		Technical	
Interviews	8	Technical Plan	16	Sprint Planning	16	Agile Sprint 1	80	Final Review	16
Technical Brief	4					Agile Sprint 2	80	QA + Bug Fixes	16
						Agile Sprint 3	80	User Documentation	16
						QA/Testing	16	Training	8
Acct Management		Acct Management		Acct Management		Acct Management		Acct Management	
Project Estimate		Project Mgmt	6.4	Project Mgmt	6.0	Project Mgmt	30.0	Project Mgmt	6.4
CONSULTING	\$8,000	CONSULTING	\$10,000	CONSULTING	\$14,000	CONSULTING	\$2,000	CONSULTING	\$1,000
PRODUCTION	\$0	PRODUCTION	\$4,560	PRODUCTION	\$1,500	PRODUCTION	\$48,300	PRODUCTION	\$9,960
Discovery Budget	\$8,000	Planning Budget	\$14,560	Design Budget	\$15,500	Dev Budget	\$50,300	Transition Budget	\$10,960

BUDGET SUMMARY	
DISCOVERY	\$8,000.00
PLANNING	\$14,560.00
DESIGN	\$15,500.00
DEVELOPMENT	\$50,300.00
TRANSITION	\$10,960.00
Project Subtotal	\$99,320.00
Expenses	
GRAND TOTAL	\$99,320.00

It's a beautiful budget and you've worked very hard on it, but at this point it is based on assumptions and might as well look like this:

Estimated Budget Worksheet

		Deliverables	Activities	
DISCOVERY	PLANNING	DESIGN	DEVELOPMENT	TRANSITION
Creative	Creative	Creative	Creative	Creative
Interviews	Design Style Tiles	Site Style Guide	Design Support	Final Review
Creative Brief		Site Design	Themeing	
User Experience	User Experience	User Experience	User Experience	User Experience
Interviews	User Req's and	UX Support	UX Support	Final Review
UX Brief	Wires Peer Review			
Technical	Technical	Technical	Technical	Technical
Interviews	Technical Plan	Sprint Planning	Agile Sprint 1	Final Review
Technical Brief			Agile Sprint 2	QA + Bug Fixes
			Agile Sprint 3	User Documentation
			QA/Testing	Training
Acct Management	Acct Management	Acct Management	Acct Management	Acct Management
Project Estimate	Project Mgmt	Project Mgmt	Project Mgmt	Project Mgmt
CONSULTING	CONSULTING	CONSULTING	CONSULTING	CONSULTING
PRODUCTION	PRODUCTION	PRODUCTION	PRODUCTION	PRODUCTION
Discovery Budget	Planning Budget	Design Budget	Dev Budget	Transition Budget
\$8,000	\$14,560	\$15,500	\$50,300	\$10,960

BUDGET SUMMARY	
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GRAND TOTAL	\$99,320.00

The client wants to see that you can meet their stated objectives within their defined budget, the actual numbers of how you get there aren't of much importance at this stage.

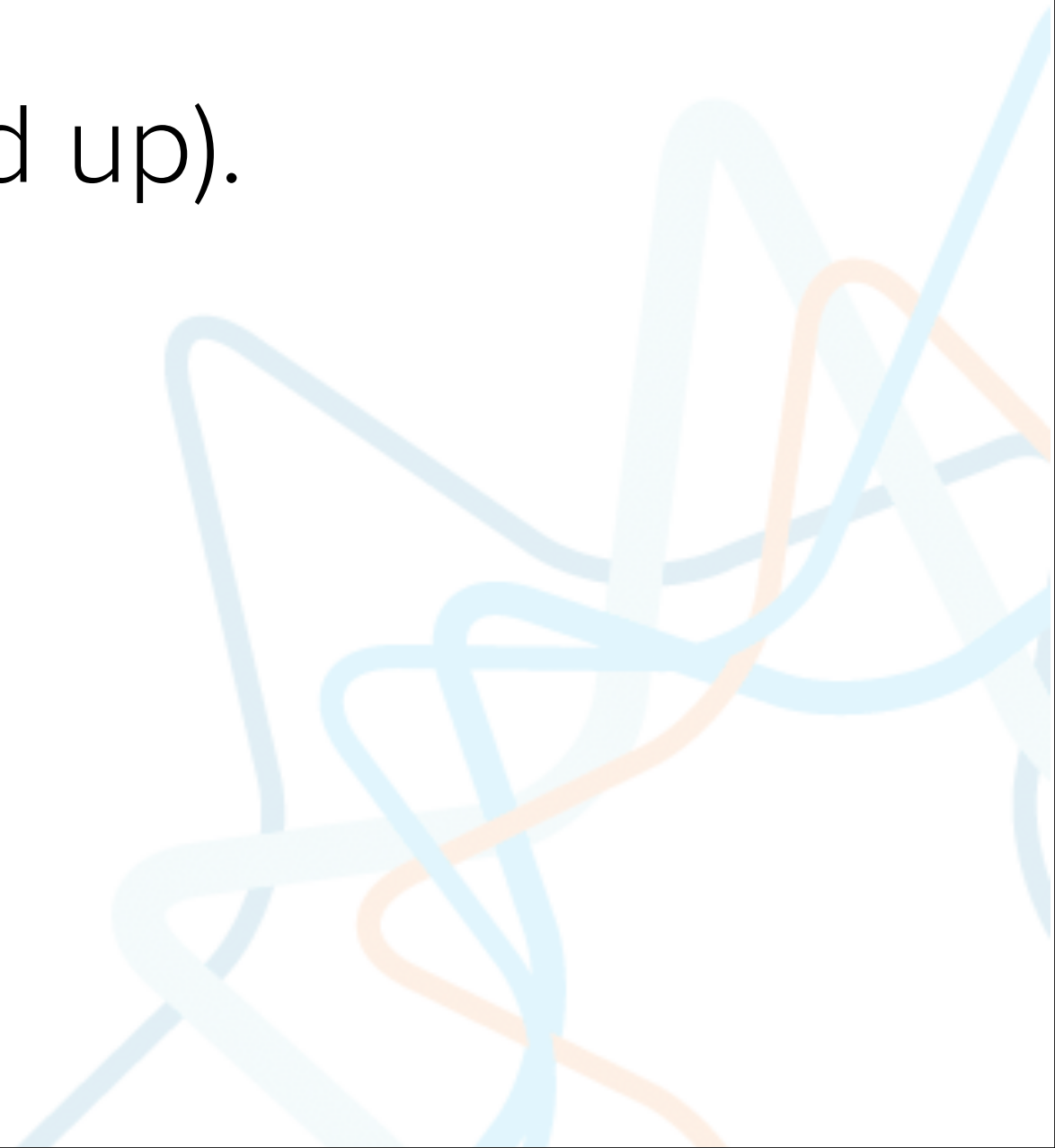
So, this means that once your proposal is accepted the estimate needs to be updated as the project evolves.

I learned this the hard way on one particular project...

A decorative graphic in the bottom right corner of the slide, consisting of several overlapping, abstract, multi-colored lines (light blue, orange, and white) that form a complex, star-like or scribbled pattern.

How NOT to Manage a Fixed Bid Project

(A brief case study of that one time I messed up).



Excerpt of the RFP from my fixed bid failure:

- Artists**
- Artists who are looking to apply should be able to easily find out about the prospectus and be able to apply and upload images to the site.
 - Multiple prospectuses for submission should be available.
 - Artists who are juried into the competition should be able to see schedule information and will be able to see schedule information that is unique to the juried artists.
 - Artist galleries from previous years should be available.
 - All historical information should be standardized throughout the site.
 - All general public facing information should be standardized throughout the site.
- Visitors**
- Will be able to see previous galleries as well as see current year's artists bios.
 - Will be able to see content objects with general information about the festival.
 - Will be able to purchase tickets for events.
 - Will be able to clearly understand the programming that is involved. (Events occur in many locations and at many times.)
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- The site back-end must be easy to use for site admins. Staff and volunteers should be able to supply the content and upload the information in a timely manner.
 - The search function must be robust across multiple taxonomies. Examples of taxonomies include: content types, user types; e.g. artists (with subcategories), visitors, press, volunteers; tags, e.g. 2012, John Doe, grand prize, watercolor.
 - Search results will be presented in a dynamic and graphic manner. When a user's finger hovers over the subject a descriptive sentence will appear with a "click" that takes the user to a full detail subpage.
 - A "Shopping Cart" for tickets, donations, artists registrations with a follow up confirmation reply to be sent to purchaser/registrant.
 - Site design must incorporate responsive design in order to deliver content to mobile users without additional site development.

Application process

Event management

with attachments

Online selection process

of user submissions

Galleries

User bios

Event ticket purchasing

Blog with archived articles, videos, audio clips, images..

Contact web form with multiple required fields

Ease of use for site admins

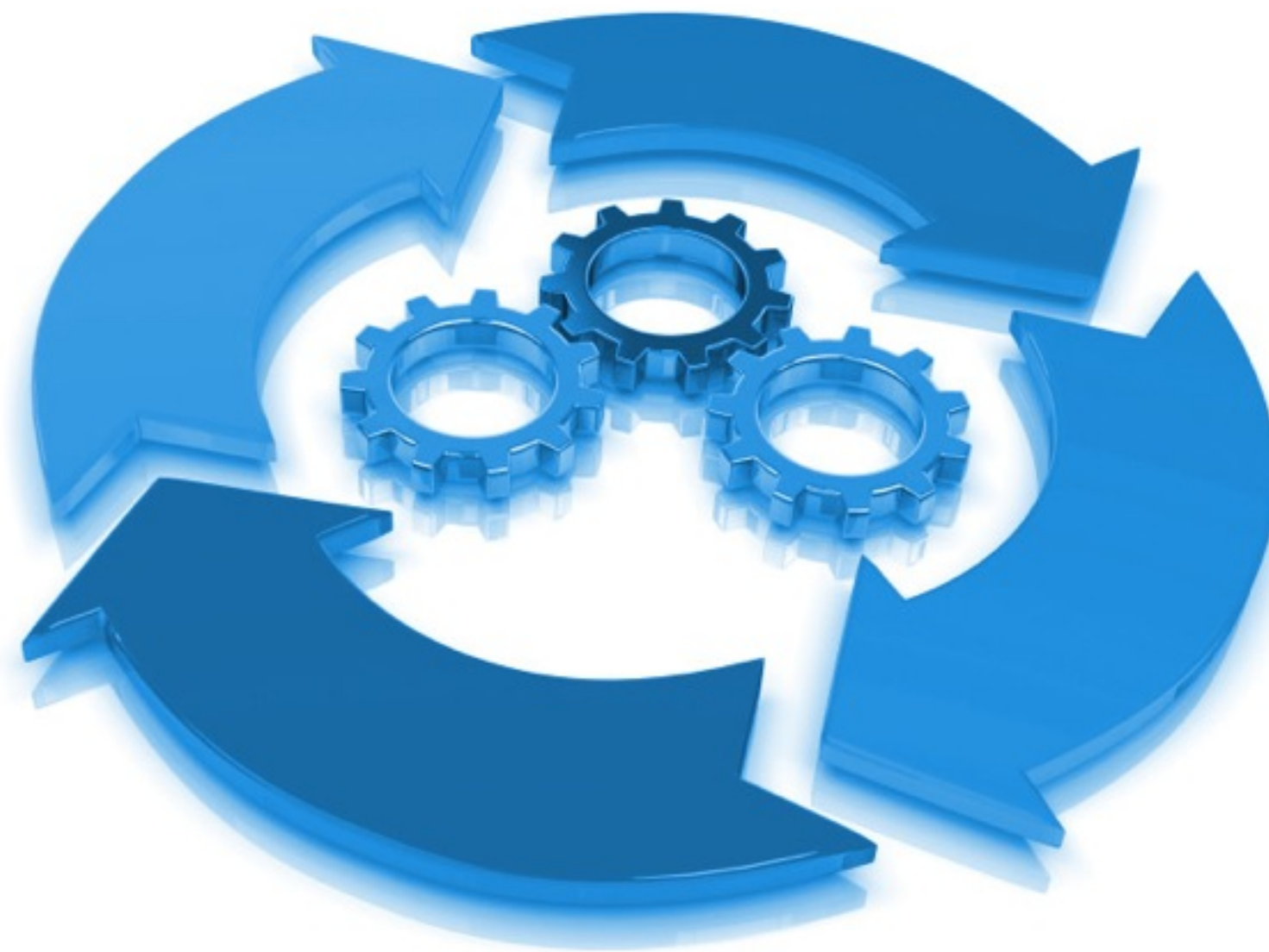
Robust search across multiple taxonomies, content types and user types

Graphic and dynamic search results

E-commerce with multiple product types

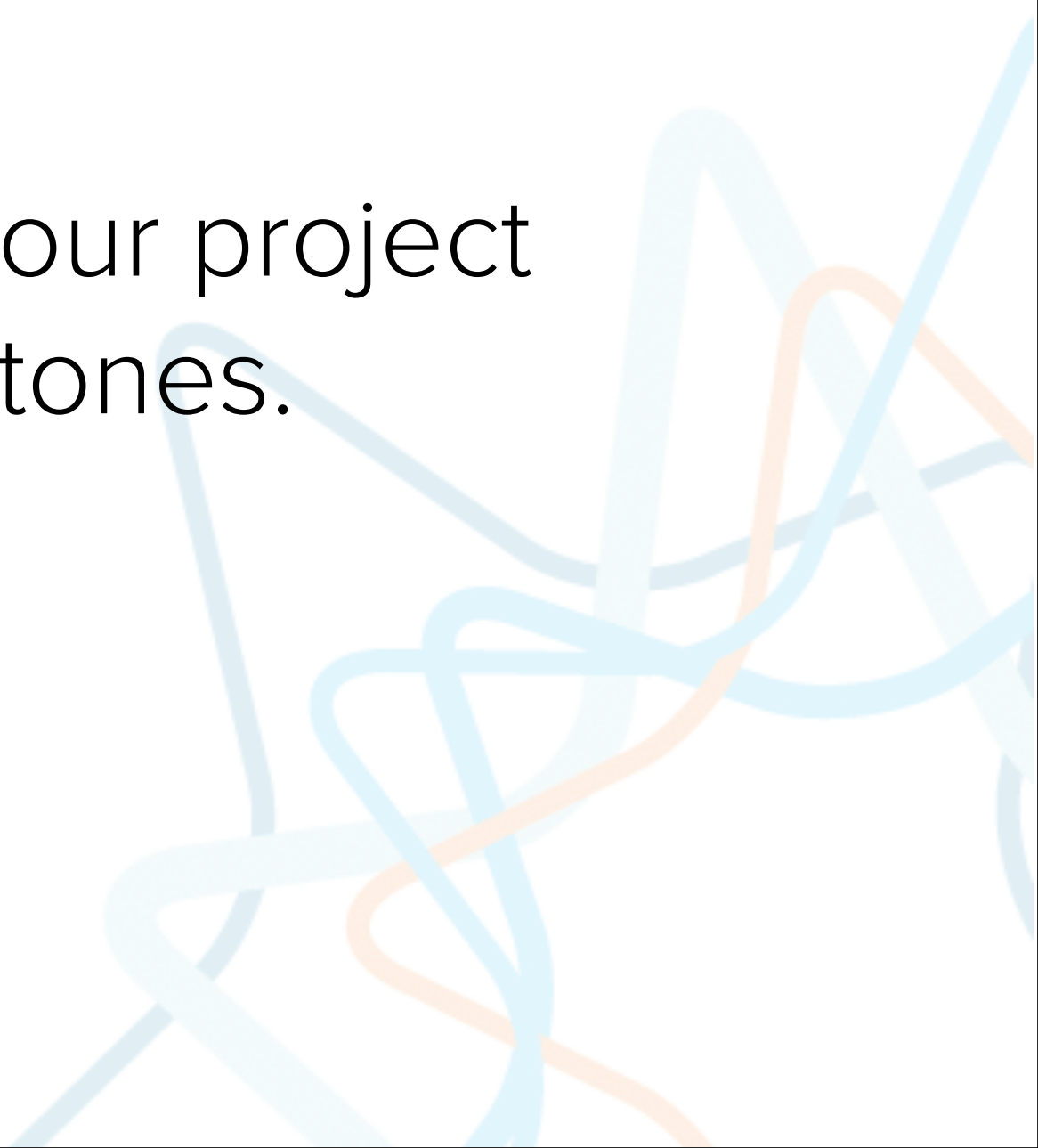
Oh, and responsive design

Revising our Process: Fixing what Needed Fixing



How could we do a better job of being accurate
with our estimates?

Our solution: integrating two estimate revisions in our project
discovery and design phase, as project milestones.

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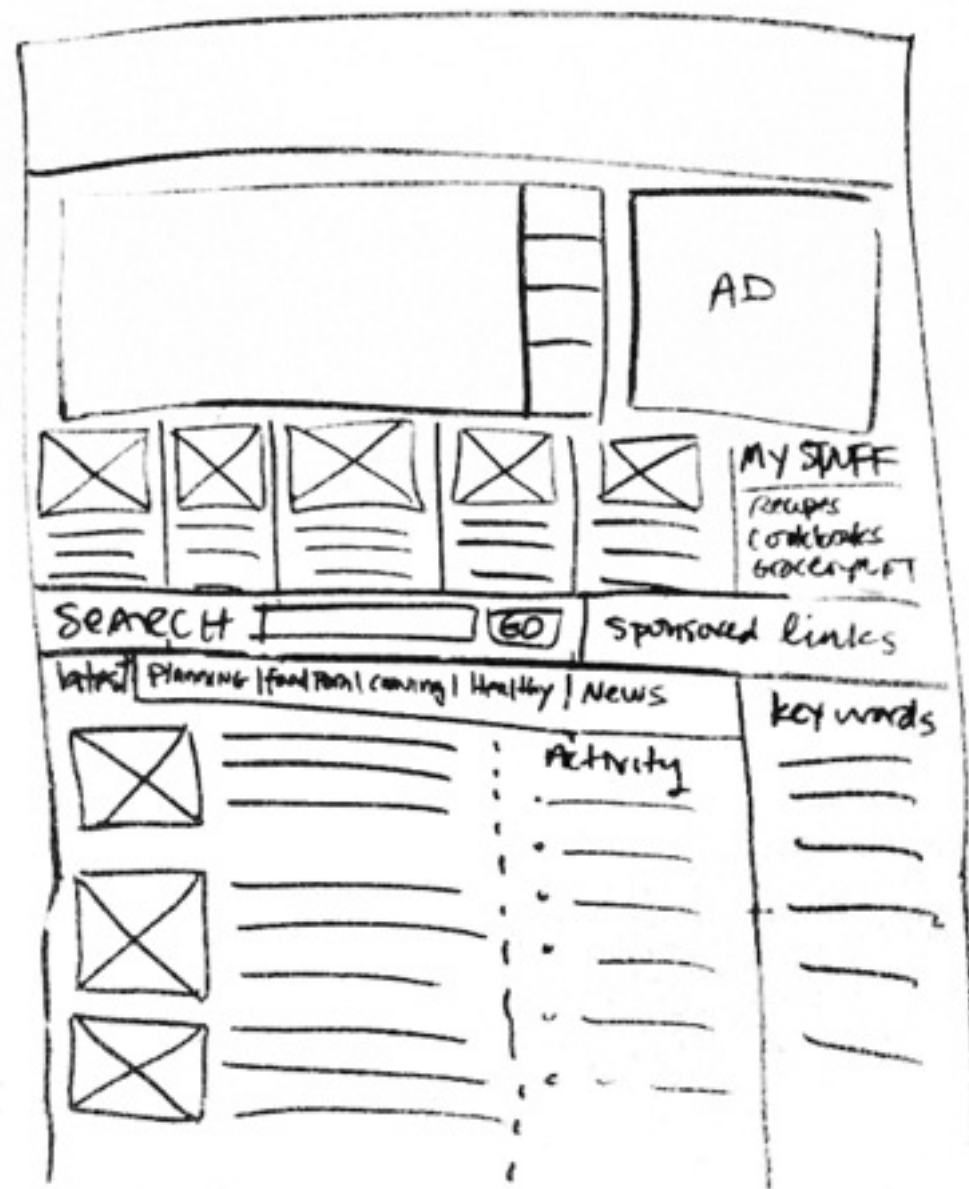
How could we do a better job explaining the effect that decisions made during the design process have on the overall project scope and budget?

Our solution: Transparency. Explaining before, during, and after.
What the process is and where the money is going.

Process Milestones: Kick Off Meeting

- Ask the right questions
- Review your process
- Discuss project milestones, scope definition, determining MVP and budget/estimate updates

Process Milestones: UX Sketches




- Client discovery meetings with UX designer
- Rapid Iterative Design: incorporating feedback and making updates
- Sketch approval

Process Milestones: Early Tech Planning

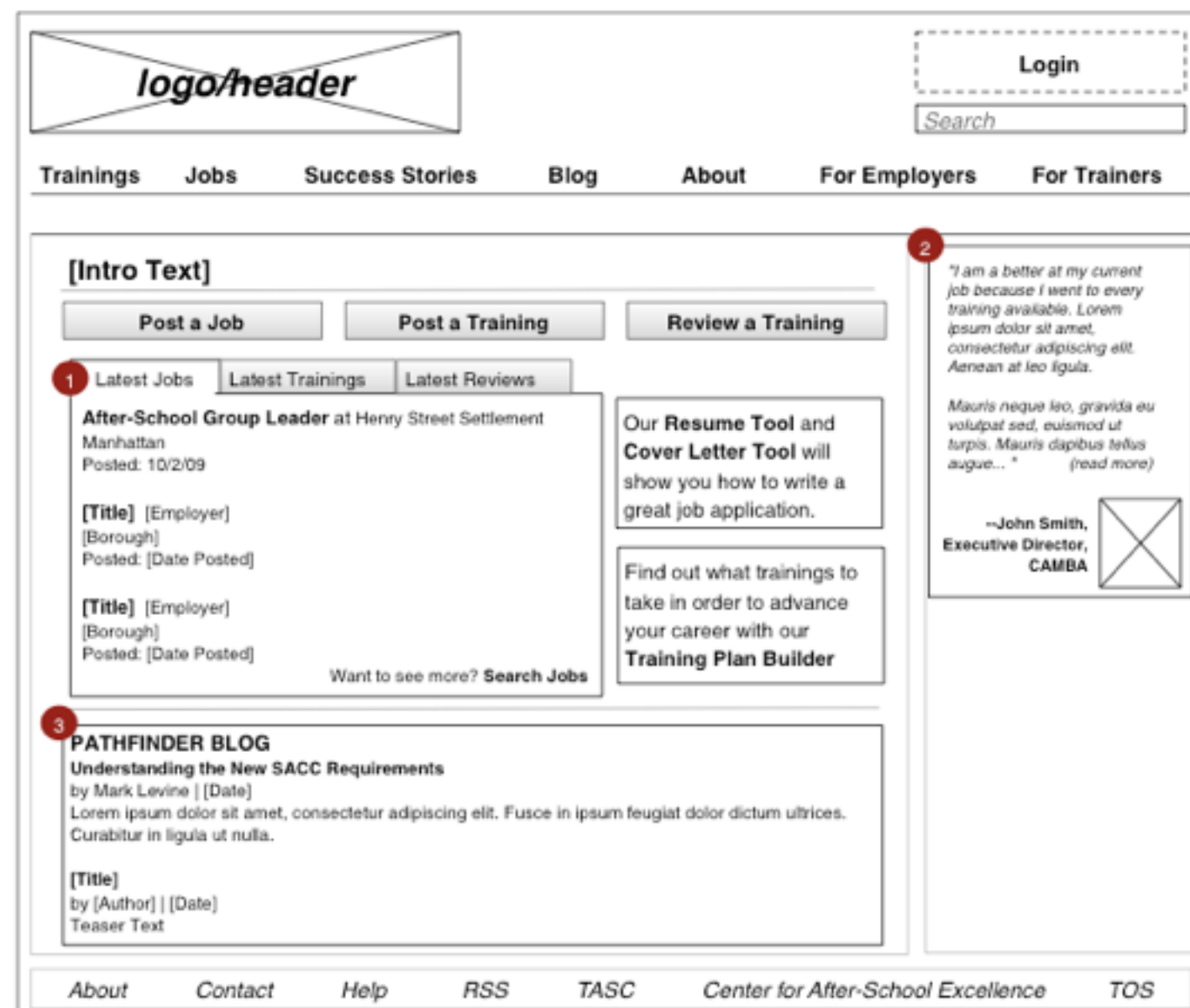
- UX designer, Tech Lead, Project Manager
- Sketch review
- Open broad tickets and provide rough estimates (i.e. Build the homepage, Theme the homepage, Built Event CT)
- Goal: +/- 40% from actual project hours

Process Milestones: Early Tech Planning

Advantages: Gives overview of feature complexity in terms of dev hours to allow for early prioritization before moving into wireframes and long before anything is built.

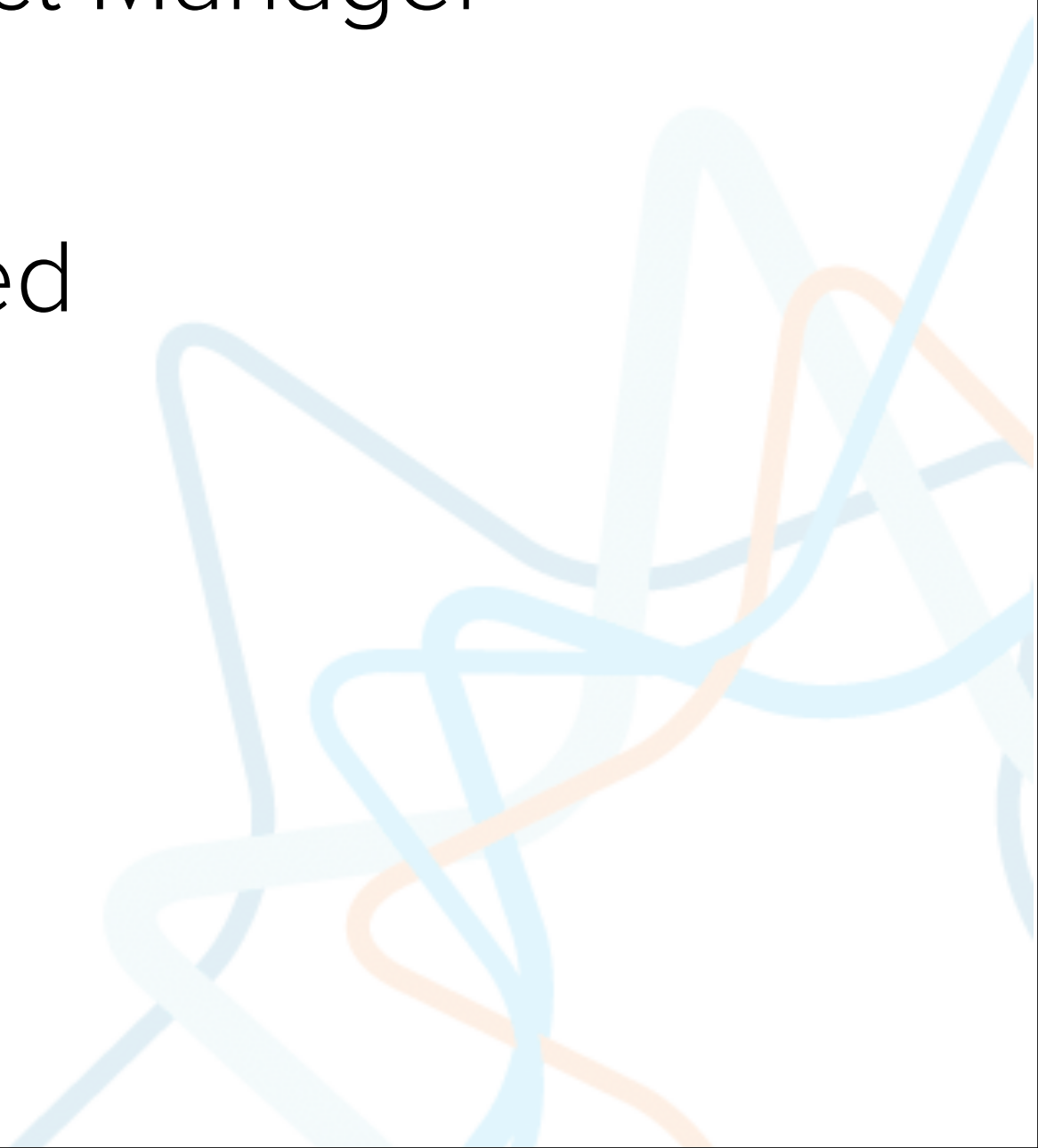
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Process Milestones: Wireframe



Must have complete and approved wireframes and interaction requirements in order to proceed with next step.

Process Milestones: Final Tech Planning

- Several 1.5 - 2h meetings spread over 1 week
 - UX designer, Tech Lead, 2 Developers, 1 Themmer, Project Manager
 - Review wireframes and interaction requirements
 - Estimate in existing tickets and add new ones as needed
 - Add implementation notes
 - Goal: + / - 10% of actual project hours
- 

 [redacted] / [redacted] 66
Build Destinations CT

Edit Comment Assign More Resolve Issue Close Issue Admin

Details

Type: Improvement Status: **OPEN** (View Workflow)
Priority: **Major** Resolution: Unresolved
Labels: None
Epic Link: Locations

Description

Wires: <https://bluespark.atlassian.net/wiki/download/attachments/38732057/Destination.png?version=2&modificationDate=1388983298985&api=v2> (from [https://bluespark.atlassian.net/wiki/display/\[redacted\]/Hours+Management](https://bluespark.atlassian.net/wiki/display/[redacted]/Hours+Management) page)

Content type that references a Location.

Fields:

- Opening Hours Field: Single Value
- Title
- Description
- Phone number field
- Email field
- Link field : Schedule an app't
- Entity reference field to reference a Location
- Category fields: Taxonomy Term Reference multivalued (non-linked, displayed as icon) (Amenities, Study areas and Equipment Vocabularies)

Issue Links

is blocked by

<a>+ [redacted]-41 Build library hours functionality	OPEN
<a>+ [redacted]-28 Build Location CT pages and navigation	RESOLVED
<a>[redacted]-67 Categories Vocabularies	OPEN

mentioned in

2014-02-25 Meeting notes

Wiki Page

At this Location (Destinations)

Complete implementation notes

Issue mapping with blockers

Links to wires and other relevant docs

Final Tech Planning Results

(these are also deliverables)

Here is a breakdown:

Total Tier 2 Project Estimate	777 hours
Total Hours Spent to Date	319 hours
Total Hours Needed to Complete Project	458 hours
Total Available Hours in Project Budget	334 hours
Hours Needed vs Hours Available	124 hours

Budget breakdown

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Full Feature List with dev estimates

Homepage = 15 Hours

+ ↑ ██████-97 Build Homepage	Homepage	3h
+ ↑ ██████-98 Theme Homepage	Homepage	12h

Search and Research = 12 Hours

+ ↑ ██████-11 Build Search & Research landing page	Search & Research	3h
+ ↑ ██████-12 Theme the Search & Research landing page	Search & Research	3h
+ ↑ ██████-15 Build Resources CT	Search & Research	4h
+ ↑ ██████-16 Theme Resource CT	Search & Research	2h

Support and Services = 3 Hours

+ ↑ ██████-17 Build Support & Services landing page	Support & Services	2h
+ ↑ ██████-19 Theme Support & Services landing page	Support & Services	1h

Locations = 79 Hours

+ ↑ ██████-26 Build Locations Search Page	Locations	16h
+ ↑ ██████-27 Theme Locations Search Page	Locations	8h
+ ↑ ██████-28 Build Location CT pages and navigation	Locations	4h
+ ↑ ██████-29 Theme Location CT	Locations	15h
+ ↑ ██████-43 Build library hours page	Locations	2h
+ ↑ ██████-52 Theme library hours page	Locations	2h
+ ↑ ██████-41 Build library hours functionality	Locations	16h
+ ↑ ██████-42 Theme library hours functionality	Locations	4h
+ ↑ ██████-66 Build Destinations CT	Locations	2h
+ ↑ ██████-69 Build At This Location page	Locations	4h
+ ↑ ██████-68 Optionally cloned parent location hours: NICE TO HAVE	Locations	6h

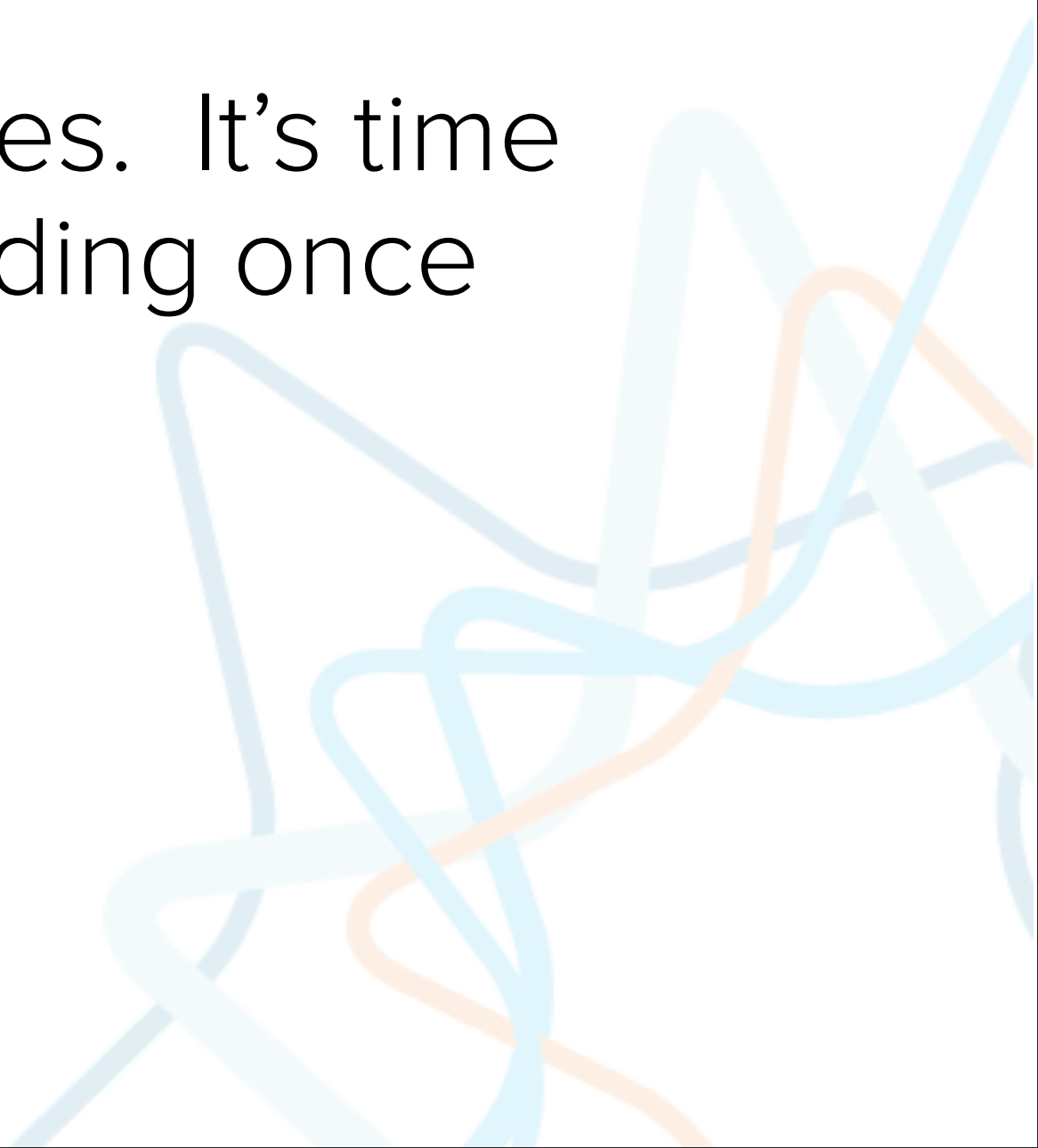
Presenting Revised Estimate and Recommendations to your Client

If over budget, give options:

- De-scope items X, Y, Z to a later phase
- Divide dev work between client and vendor teams
- If everything is a priority - can more budget be found?

So the Client Pays for all this Estimating?

Really, it's technical planning with valuable deliverables. It's time wisely spent up front to avoid rabbit holes and rebuilding once development begins.



From Building to Wrapping the Project

- Dev team should report any serious overages, discuss with client and empower them to make decisions.
- Overall project hours should be + / - 10% final Tech Planning Estimate amount
- Happy client, got their MVP, within budget, and were informed throughout the process

When Doesn't this Process Work?

- Client provides UX - No true discovery process
- Time and materials projects - no need to bother in that case!
Estimate features as you go and Agile - away!



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Questions?





**How Changing our Estimation Process
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Thank you!

