

Pre-Engagement

1. Analyze Needs

Working with the client, determine the following:

- a. business reason for the estimate; e.g., how is estimate going to be used?
- b. what is the current lifecycle phase?
- c. what exists regarding system documentation?
- d. what is being counted - project(s), application(s), enhancement(s)?
- e. the scope of work regarding the type of count to be performed; e.g. one or more applications.
- f. the need for a detailed size measure
- g. the type of estimation (granularity) and which estimation process and/or tool would best serve the engagement.

Participants: Client and DCG

Techniques: phone interview

DCG Roadmap Step: A

Output: Information related to Estimation Expectations

Session Duration: one hour

2. Identify the Deliverables

Understand the client's expectations with regard to the delivered output

Review with the client the various outputs that are available based upon the estimation model being used

- a) Estimation reports
- b) Worksheets

Participants: Client and DCG

Techniques: phone interview

DCG Roadmap Step: B

Output: Information related to Expected Deliverables

Session Duration: one hour

3. Statement of Work

Prepare and review the SOW with the client to ensure their understanding of key assumptions:

- a. Roles and responsibilities
- b. Type of Sizing
- c. Type of estimate
- d. Number of estimations (iterations)
- e. Sizing and estimation reviews
- f. Deliverables



david consulting group

DCG One-Off Estimation Process

Participants: Client and DCG

DCG Roadmap Step: C

Output: Accepted SOW

Engagement

1. Conduct Sizing

DCG sizing expert will work with the client Subject Matter Expert (SME) and apply the appropriate sizing technique. Results are reviewed with the client.

Adjustments to the size are made as necessary.

Participants: Client (PM, SME) and DCG counter

Techniques: Applied counting method

DCG Roadmap Step: 1

Output: Accepted size, sizing worksheet with detailed descriptions

Session Duration: 8 – 24 hours

2. Identify Parameters

DCG estimator will work with the client to select the appropriate parameters (e.g. Galorath's Knowledge Bases) that describe the technical environment and complexity. Adjustments to all applicable qualitative parameters will be made in accordance with the information gained in discussions with PM and SME.

Participants: Client (PM, SME) and DCG estimator. Galorath consultant as needed.

Techniques: Interviews

DCG Roadmap Step: 2

Output: A completed estimating worksheet/model

Session Duration: 8 hours

3. Generate Estimate

Produce an estimate based on all inputs (size, parameters). Review the resulting values with the client and make any necessary adjustments.

Participants: Client (PM, SME) and DCG estimator. Galorath consultant as needed.

Techniques: Working session

DCG Roadmap Step: 3

Output: An acceptable estimate

Session Duration: 8 hours

4. Final Estimate Report

Generate a final estimate report based on agreements reached during the proposal phase.

Participants: Client and DCG estimator.

Techniques: Standard report format

DCG Roadmap Step: 4



david consulting group

Output: Formal Report

Session Duration: 4 hours

DCG One-Off Estimation Process



DCG One-Off Estimation Process

DCG One-Off Estimating
Process Roadmap

