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Template Guide

What is a Project Estimate document?

A Project Estimate document provides a forecast of the size and duration of the required work tasks for all phases of a project.

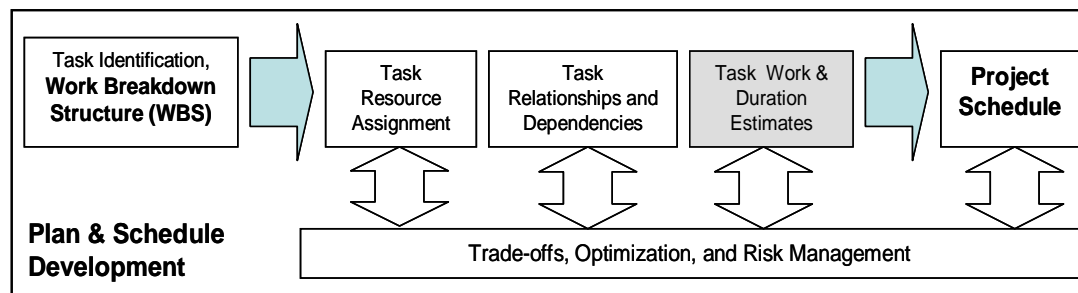
- A description of the project scope
- A description of the project constraints
- A description of the project sizing guidelines
- A description of the work breakdown structure for the project
- A description of the estimated level of effort and duration of the work tasks
- An estimated cost for the required project resources (labor)

When do I use a Project Estimate document?

The Project Estimate document is developed by the Business Analyst and Project Manager, in conjunction with functional business leads, after the development of the Statement of Work for the project. The work tasks and associated time estimates identified during the initial Project Estimation activity should be used as the basis for the initial Project Schedule.

How to use this template

This template incorporates components of the work breakdown structure method of estimating the size of a project. The Work Breakdown Structure (WBS) method creates a multi-level decomposition of the project effort that is used for identifying and authorizing work, monitoring performance, and reporting on all project activities.



The top level of the Work Breakdown Structure (WBS) refers to the entire project. The next two levels, sometimes referred to as the Contract Work Breakdown Structure (CWBS), break the project into its major components (subprojects) and deliverables. The full Work Breakdown Structure, sometimes referred to as the Detailed Work Breakdown Structure, decomposes each component of the project into the activities and tasks required to complete the component. Typically, the Detailed Work Breakdown Structure can only be fully completed, after the identification of the detailed-level functional and technical requirements for a project.

The WBS for a small project can be developed by simply decomposing the work of the project into detailed low-level activities and tasks. However, for medium and large projects, developing the WBS is an iterative process involving at least two passes.

An initial high-level pass is made at a coarse level of detail to develop the high-level WBS. The high-level WBS is used to support the development of initial cost estimates and high-level project plans. At this level of planning, the resources to be used are considered primarily in terms of skills sets and job categories.

This document is designed to allow the user to enter the known details of the Work Breakdown Structure for the project, enter estimates of the size and duration of the required work tasks for all phases of the project and enter labor/resource data, in order to develop initial project cost estimates. Sections may be added, removed or redefined at your leisure to meet your particular business circumstance. Example tables, diagrams and charts have been added (where suitable) to provide further guidance on how to complete each relevant section.

1 Project Scope

1.1 Project Milestones by Project Phase

[Provide a high-level overview of the scope of the project, by project phase (if applicable), in the table below:]

Phase I [mm/yyyy]-[mm/yyyy]	Phase II [mm/yyyy]-[mm/yyyy]	Phase III [mm/yyyy]-[mm/yyyy]
<ul style="list-style-type: none"> [Enter Project Milestone] [Enter Project Milestone] [Enter Project Milestone] 	<ul style="list-style-type: none"> [Enter Project Milestone] [Enter Project Milestone] [Enter Project Milestone] 	<ul style="list-style-type: none"> [Enter Project Milestone] [Enter Project Milestone] [Enter Project Milestone]
Targeted Release Date:	Targeted Release Date:	Targeted Release Date:
[mm/dd/yyyy]	[mm/dd/yyyy]	[mm/dd/yyyy]

1.2 Project Scope Details

[Provide a detailed description of the items that will be included in the scope of the project. Note: Sample scope items have been included for illustrative purposes only:]

Project Scope Description	Project Phase
<i>Reporting and Analytics</i>	
Business Intelligence/Reporting from new Service Management Application.	[Enter Project Phase]
[Enter Description of Scope Item]	[Enter Project Phase]
<i>System Process Integration</i>	
Integration of Service Management Application customer account data into Oracle Accounting Application.	[Enter Project Phase]
[Enter Description of Scope Item]	[Enter Project Phase]
<i>System Administration</i>	
System Security/Authentication	[Enter Project Phase]
[Enter Description of Scope Item]	[Enter Project Phase]
<i>[Enter Name of Functional Area]</i>	
[Enter Description of Scope Item]	[Enter Project Phase]