PROJECT ESTIMATE QUESTION GUIDE

Whether you're estimating a project based on a formal request, a discussion, or an email from a stakeholder or manager, you need to know as many project details as possible before you can provide a realistic estimate of time or cost. Use this guide as a basis to start a conversation so you get everything you need to estimate your work accurately.

THE Art & Science OF LEADING PROJECTS

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LOOK INWARD FIRST

Before you reach out to others to ask questions, make sure you have your house in order. That means you need to understand your team, how you work, and what works best.

These questions are a great place to start:

- What skills do I need for this project, and who might be able to fill these roles?
- What processes do we use, and what might work for this kind of project?
- Have we conducted projects like this one in the past? If so, can I look up past estimates, retrospective meeting notes, or even hours logged in our time tracking system?

You might inherently know the answers to these questions due to your experience with your organization or team. If so, that's great! Then move on to some more questions—don't be bashful!

DIG INTO THE DETAILS WITH YOUR STAKEHOLDERS

Many stakeholders or product owners don't realize you need a tremendous amount of information to prepare a true and fair estimate. They also might not realize they already have the answers to your questions.

One of the biggest culprits behind misestimated projects is the lack of pertinent information and background provided for would-be projects. Get your project stakeholders to clear up that gray area and help you break the project down into pieces. That way, you'll be able to create an estimate based on what they need—not what you think they need.

It's also often easy to take a project request at face value. The problem with doing that is the fact that there are likely a lot of details to uncover. So put your thinking cap on, and scrutinize the request.

Here are some questions to consider for any project request:

- **What's the goal of the project?**

- **How will we determine if the project is successful?**

- **What returns do you want to see as a result of the project?**

- **Who will participate in the project from your side? Have you discussed roles and responsibility, or even project ownership?**

- **How much time have you carved out to work on the project with our team?**

- **What range of services does the project require?**

- **What's your project budget?**

- **Is technology involved? If so, what's the technology? (Is there a technology lead I can put our technologists in contact with to work through specifics?)**

- **Do you employ anyone with expertise on the work we'll be conducting? If so, how do you expect them to be involved in our work? Or will they be taking over our work when it's complete?**

- **What's the project timeline? Will you require our services or support after our work is complete?**

This list could go on and on depending on the level of information you're provided. Be persistent, and get the answers you need.

If you're doing this as a precursor to a client project and your client isn't inclined to answer every question, take it as a sign. If answering a set of questions to help you form a good estimate now is too much, will partnering with you when the project is underway be too much as well? Use your judgment in this respect. Not every estimate becomes a real project, so not every request needs to become a real estimate.

Remember: Asking questions is a good thing, as long as they're direct and serve a purpose.

HAPPY ESTIMATING!