

Strengthening Estimation Governance in a Large Organization



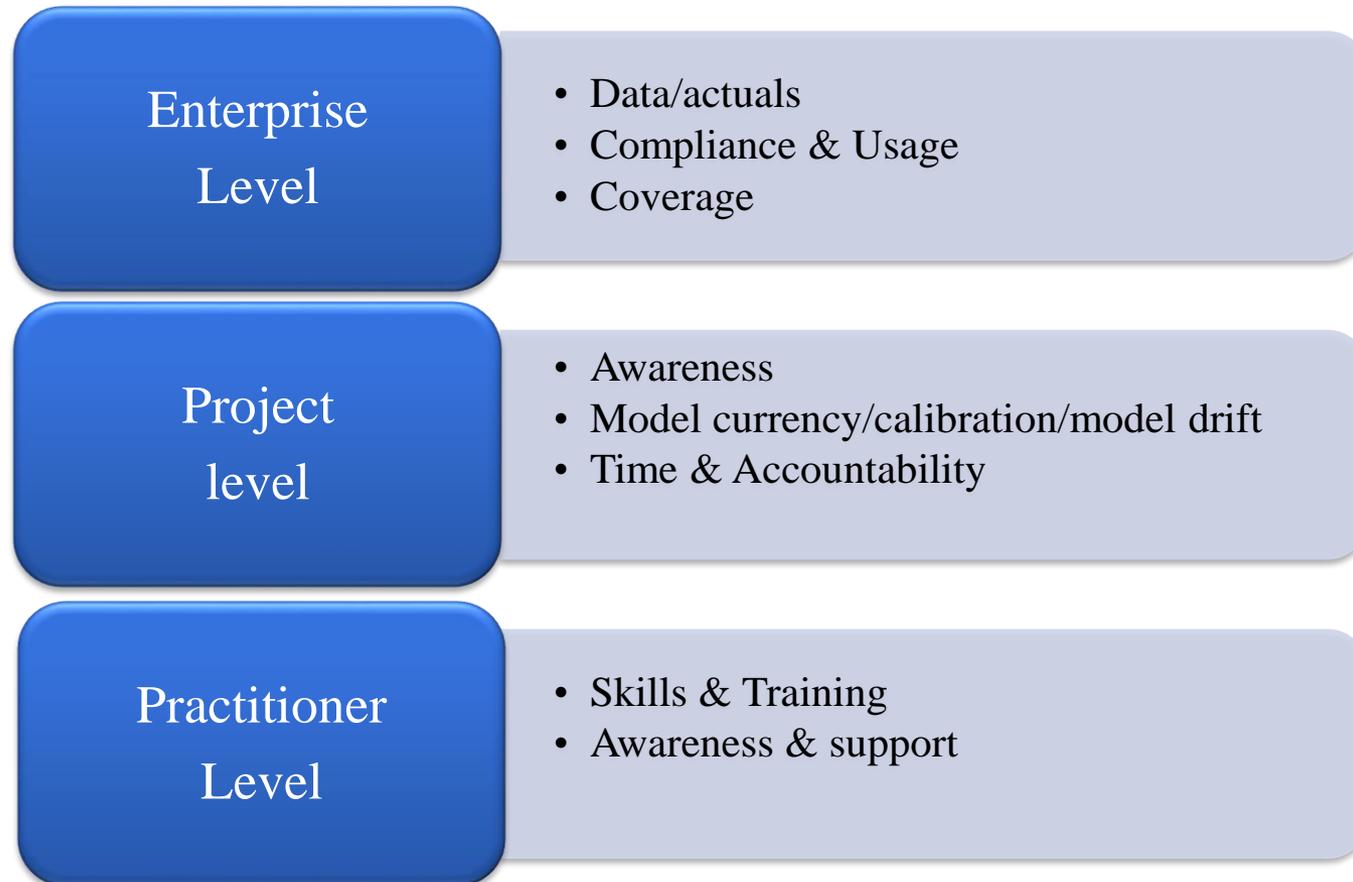
Abstract

- Large, complex, multi-region organizations are uniquely challenged to maintain and comply with their own internally-defined best practice standards. Estimation is not exception. As a result, it's often difficult to effectively deploy standards and ensure they are being used, and share the resulting output data with the enterprise at large. A centralized tool accessed through a web interface can go a long way to addressing some these issues.
- In 2016 Q4, IBM piloted SLIM-Collaborate and started to transition towards SLIM-Collaborate H1 2017. In this presentation, Angelo Moore and Christophe Guillou share the motivating factors that drove IBM to look more closely at SLIM-Collaborate, namely better control and collection of enterprise estimation data, platform independence (Windows/ AppleOS), simplified use and compliance and tracking. IBM's deployment was successfully competed H1 2017 - usage is building and ease of use continues to encourage potential users to adopt.

Problem Statement

- Large, complex, multi-region organizations are uniquely challenged to maintain and comply with their own internally-defined best practice standards. Estimation is not exception.
- As a result, it's often difficult to effectively deploy and adopt estimation standards,
 - ensuring they are being used,
 - share the resulting output data with the enterprise at large,
 - closing the feedback loop.
 - Enabling a learning organization.....
- Contextthe large enterprise
 - Diversity in location, regions, countries
 - Diversity in peopleskill, language, responsibility
 - Diversity in offering from package implementation, integrations, custom build, complexity etc
 - Diversity in estimation approach's (bottom-up, top-down, parametric)

Typical Challenges: Deploying & Adopting Estimation standards



Why it matters !

We are working
too hard !

- What will it take to implement....?
- What resources.....when
- ...is there a standard model...

Learn from
the past

- Final product disclaimer “*past performance is not guarantee of future performances*”

Not simple
to address

- Large complex organizations are “complex”.....and “Large”...lets look at context

Contextthe large enterprise

The Large Enterprise

Diversity

- location, regions, countries
- peopleskill, language, responsibility
- offering from package implementation, integrations, custom build, complexity etc

- It can be really challenging deploy and adopt standards in such a complex environment

Solution direction

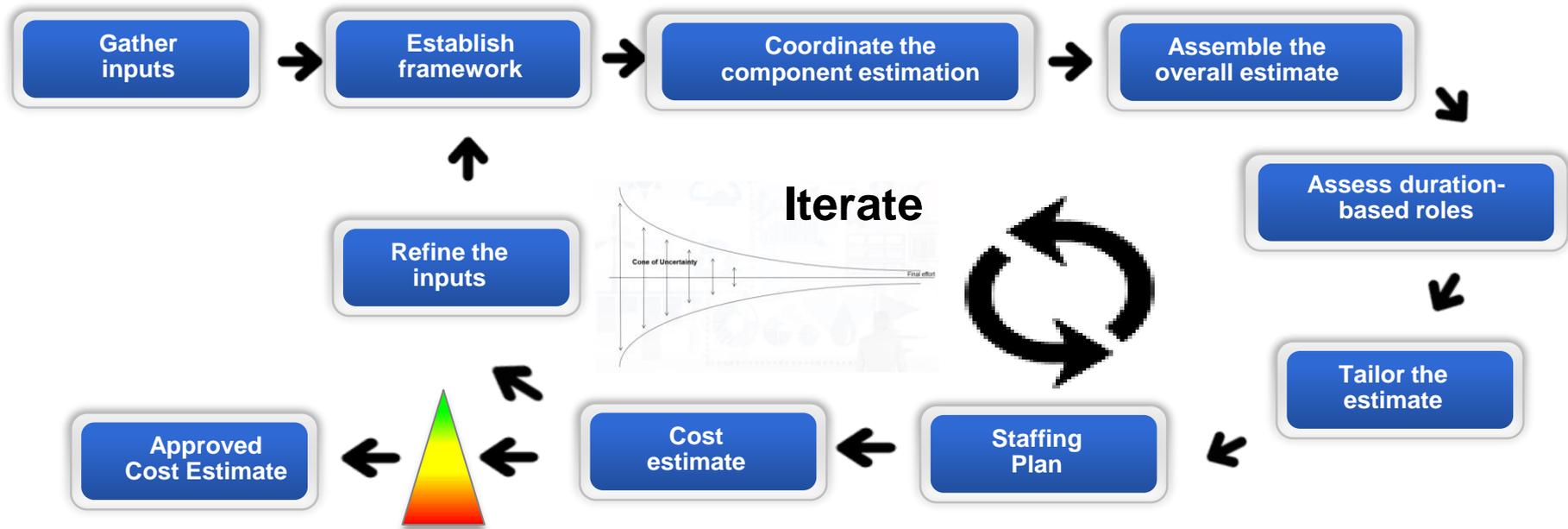
Part of the solution has to include

- Abstraction from the complexity
- Centralization

Context (continued) : Estimation “as a process”

Estimation is a “**process**” not an activity or step

- **Process:** Activities, Connections & Flow



- **LEAN lens:** there are essentially three types of improvement driven by correct action:
 - Point improvement, which improves a specific step in the in process i.e. improved approach to adoption estimation standards for a particular offering type (awareness issue).
 - Line improvement, which improves flow through series of estimation process steps, such as improved workflow to guide the estimation process and a practice level.
 - System improvement, which is targeted at improving high level (business) processes (portfolio management), such as improved estimation models, improved method adoption, improved actual harvesting & calibration process.

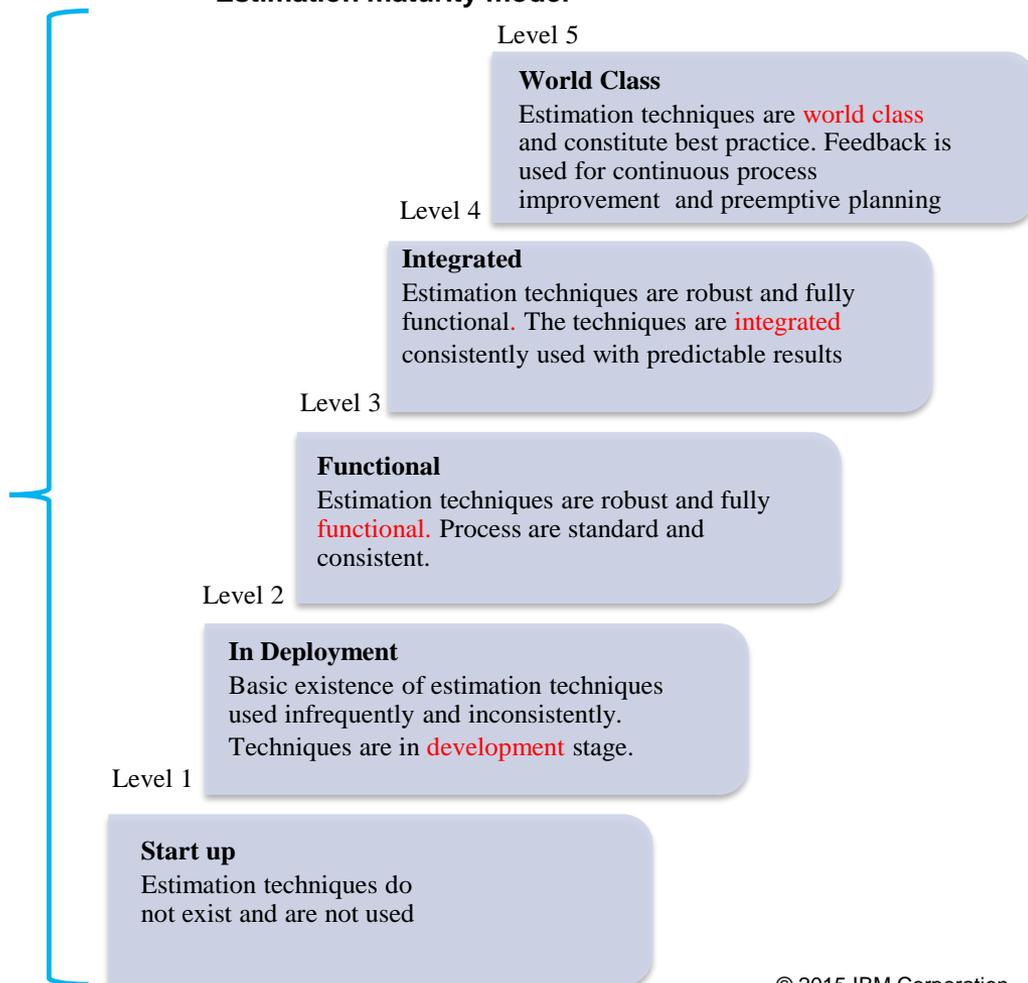
Context (continued) : Estimation “as a practice”

Standards Maturity Levels

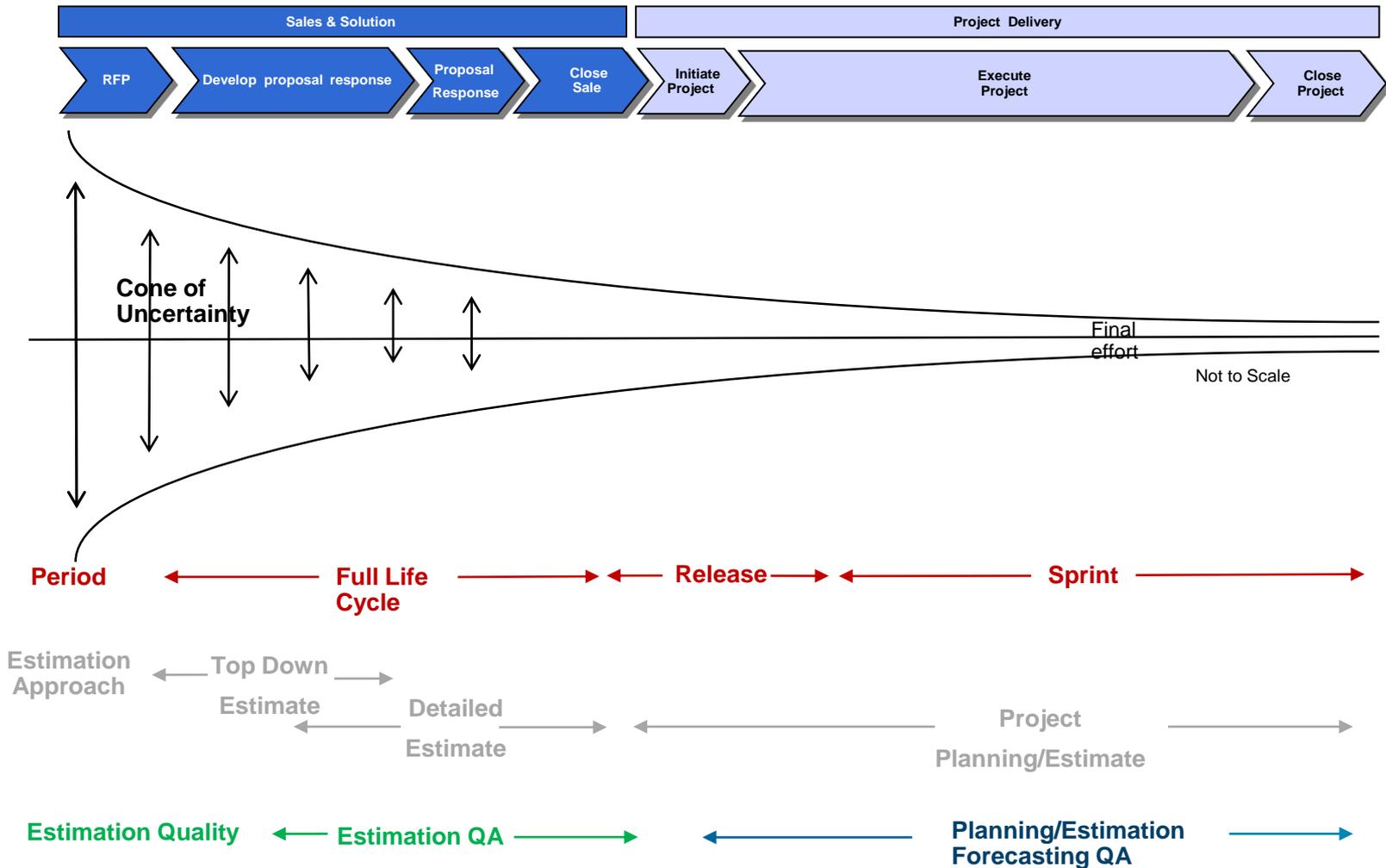
- Like any standards, estimation maturity levels can be assessed & improved
- But maturity can differ at various distinct organization levels

Organization	Governance
Organization	Estimation Office (Estimation CoC)
Organization	Estimation Maturity Assessment
Organization	Estimation Policy
Organization	Estimation Method
Organization	Estimation Tools
Organization	Estimation Process
Process	Work Management
Process	Stakeholder Management
Process	Issue Management
Process	Change Management
Process	Quality Assessment Management
Process	Approval
People	Estimation SME Qualification
People	Roles & Responsibilities
People	Skills Development
People	Accountability
People	Estimation Community

Estimation maturity model



Typical approach



Enterprise tools for Enterprise standards

To help improve
the *process* and
practice

- Abstraction from the complexity
- Centralization

What does
such a tool like ?

- Web based
- Enterprise logon
- Back end DB
- Centralized infrastructure

Complementary
Approaches

- Top-down/parametric
- Bottom-up - WBS

Our Journey to SLIM Collaborate

What is an Estimation model (in practice)?



What is an Estimation model (better-practice!) ?

Area	Eave	Rake	SF	Material	Quantity	Unit Cost	Total Cost
11 Area #1	30	14	420	Waste	110%		
12 Area #2	30	14	420	Totals			
13 Area #3	50	16	800	Actual Eave	150	30	4,500
14 Area #4	50	16	800	Actual Rake	145	30	4,350
15 Area #5	30	3	900	Valley LF	86	50	4,300
16 Area #6	30	3	90	LF of Hip and Ridge	141	26	3,666
17 Area #7			0	Ridge Vent LF	96	15	1,440
18 Area #8			0	LF of Winterguard	396	16	6,336
19 Area #9			0	Rolls of winterguard	12	20	240
20 Area #10			0	# of Pipe Flashing	2	20	40
21 Roof Area Subtotal			2620	Chimney Vent Flashing	1		
22 Hip And Ridge		Bundles	5	# of can vents to replace	4		
23 Total SF			2785	Tin Shingle areas	1		
24 Total Squares			2R	Satellite Dish	1		
43 Winterguard 1 Sq roll	\$ 49.00	12	\$ 468.00	8/12 simple		\$ -	
44 Metal			\$ -	8/12 with valley		\$ -	
45 Gutter Apron	\$ 7.29	15	\$ 109.35	12/12 with valley		\$ -	
46 ODF	\$ 9.49	140	\$ 1,328.60	Ridge Vent		\$ -	
47 W-Valley 20"	\$ 23.50	1	\$ 23.50	Out for ridge vent		\$ -	
48 Flashings			\$ -	Tin Shingles		\$ -	
49 Chimney Flashing	\$ 55.00		\$ 55.00			\$ -	



As discussed earlier challenges exist in larger organizations ?

- Many standardized (and non standard “home grown”) Excel-based Estimation Models
- Many Estimation Model to refresh and recalibrate due to technological change
- Collecting project delivery feedback across Offerings / Geos is a constant challenge, as experts move on to different roles !
- Estimation catalogue & Compliance KPIs constantly change



Why we adopted SLIM Collaborate

- Cross-platforms compatibility (eg. **Mac** / Linux/ Windows / iOS / Android)
- Built-in Enterprise Data-Warehouse to store **Solution Estimates** as well as **Closeout projects**
- Enables Track usage & compliance to Estimation Best practices
- Close the Feedback loop between Solutioning & Delivery
- Supports creation and recalibration of Offering trend groups to adapt to new technological changes



SLIM Collaborate – Adoption Roadmap 2017

Q4 2016

Q1 2017

Q2 2017

SLIM Collaborate Pilot (QSM Sandbox)

- Identify Target Audience
- Minimal Requirements
- Sandbox Configuration
- Estimation Practitioners on-boarding
- 1:1 Coaching sessions
- Pilot Kick-off activities

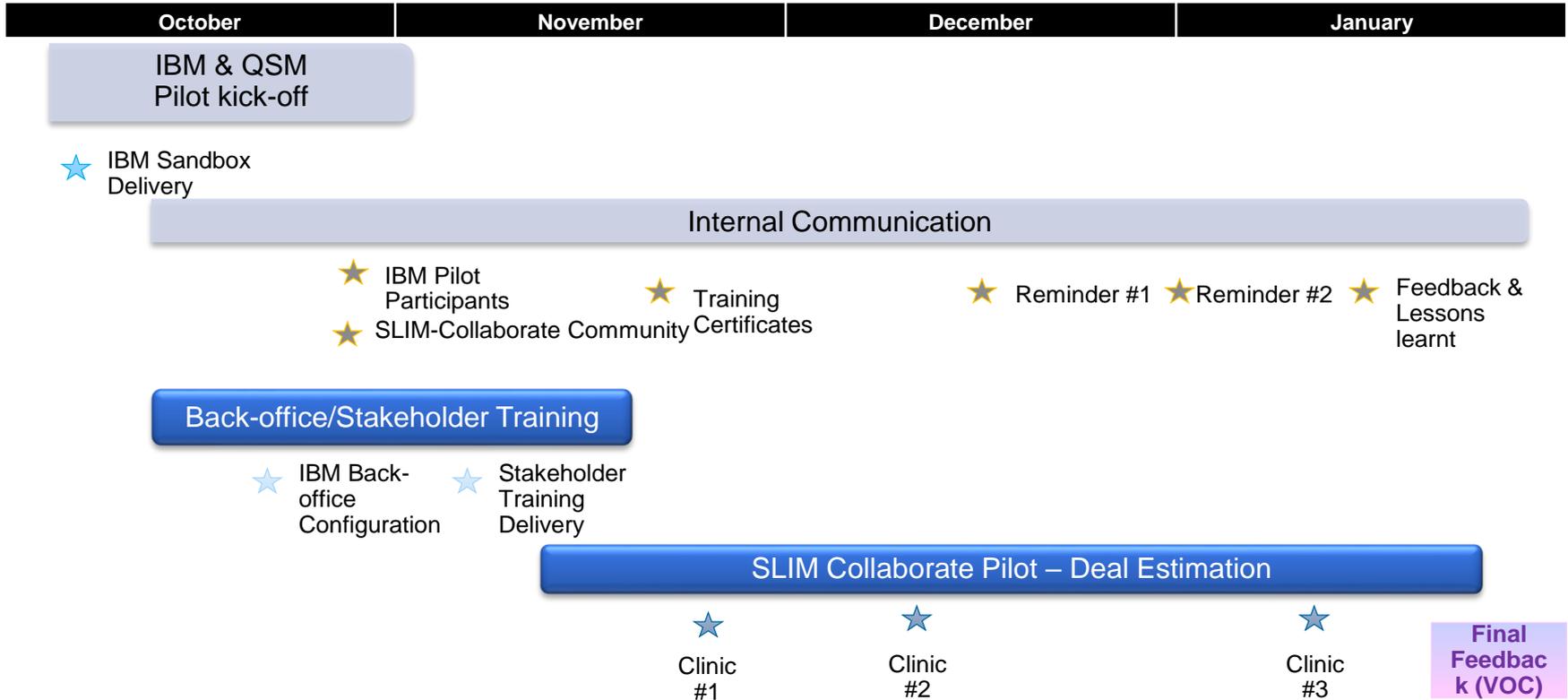
QSM / IBM Regular Team Interlocks

- Review Voice of Customer
- Flesh out a prioritize list of Features
- Identify Deployment options & Estimates
- MVP Roadmap
- Project Kick-off activities

SLIM Collaborate “As-a-Service” (Production Deployment)

- Technical Interlocks
- Architecture / Product Configuration
- Development / Testing
- GA
- Announcement

SLIM Collaborate – Pilot (Q4 2016 -> Q1 2017)



SLIM Collaborate – QSM / IBM Interlocks / Proposed Enhancements (Q1 2017 -> Q2 2017)

Must-Haves

Nice to Have

Product & Feature Development			Non-Functional Requirements	
Configurable Risk / Confidence Level	Adjustable Risks Sliders	Calculator Improvements	Federated Authentication IBM w3Id	Configurable Data Storage Locations
Workflow State Persistence	Integration REST APIs	Gearing Factors Auto-Tuning	Cloud Scalability / Elasticity	Cloud Deployment (Bluemix)
Export Project Sizing Metrics	Auto-Project Assignment	Closeout Projects View		
Last Modified date / Last Modified By	Human Readable URLs	Adjustable Project Phases		
Customizable Staffing Plans	Cross-Browser Compatibility			
Trend group Generation	Quick Tagging / Filtering	Accessibility Conformance	Performance	Data & Analytics Reporting
Notifications / Push-Notifications	@Mentions & User TypeAheads	Reactive UI		

SLIM Collaborate “As-a-Service” – MVP (Q2 2017 -> Q3 2017)

May

June

July

IBM Deployment Options Review

★ Deployment option selected

Single Sign-on– Dev /Integration Testing

- ★ Use Cases Development (QSM)
- ★ SAML Test Sandbox Configuration (QSM)
- ★ Test Bluepages Users & Test Bluegroup (IBM)
- ★ W3Id Test Service Provider Provisioning (IBM)
- ★ Issues / Troubleshooting (QSM/ IBM)

Production Environment Preparation

- ★ IBM Production Server (QSM) <https://ibm.slimcollaborate.com/>
- ★ IBM Sandbox Data / Template Migration (QSM)
- ★ W3Id Production Instance Provisioning (IBM)
- ★ OBS Node Configuration (IBM)

Execute Deployment Plan

- ★ Install IBMSAML Plugin (QSM)
- ★ Provision Authentication Code (IBM)
- ★ Provision Bluegroup (IBM)

★ Lessons Learnt

Internal communications

- ★ Entitled Users for SLIM Collaborate License
- ★ SLIM Collaborate Pilot Completion + Next Steps to Retain access
- ★ Enablement Training Session (Week 1-2 in August) SLIM Community Updates & Support Channel

Benefits of a platformed estimation tool like SLIM Collaborate

- **80+ users** on-boarded since completion of the **Pilot**
- Storage of **many** reference **Closeout** projects
- Creation of **new Offering trend-groups** implemented during in 2018

Next steps...More to come ahead of 2019

- Each new offering will have a corresponding trend group
- Link our top/down and bottom-up platform tools

Final words on Estimation...

Many acceptable ways to deliver projects....

... Different Estimates are perfectly acceptable.



Thanks & Q&A

What's the weight of this giant pumpkin ?

