Effort Estimation Model
Story

Segmentation:
Consultants whose day to day work is to visit client and gather necessary requirement and provide them with delivery details like timelines required, budget estimates, resources etc then this APP will help them with all those details after initial configuration.

Targeting:
This App is for consultants in service industry or any company which provide software solutions or any other related services to clients.

Positioning:
This App will help consultants to avoid multiple iterations of mails with teams, meetings with client and team members, while providing estimates as and when needed instead of referring to multiple documents and discussing with multiple people.

Point of View

User
Consultant with 25+ years of experience in software services industry

Needs a way to
- Quickly provide estimates for customer required developments.
- Estimates/Billing Rates that are going to be committed with the clients should be up to date with industry and company’s standards.
- E-Mail option to send discussed estimates to colleagues & clients for further review or as proof of requirement.

Surprisingly/Because/But/So that
A handy App is needed because if at the time of meeting if those details are not available handy then has to take notes of client’s requirements, send that notes to team, team will review and provide estimates and have to schedule another meeting with client to discuss revised estimates and for getting final approval.

A handy App can avoid these multiple iterations of meetings and reaching out to different teams and saves lot of time. This App can be updated by a separate team at company level and all one has to do is just enter the developments and App will give all the necessary details.
**Mr. K**

**Background:**
- 25 years or experience in consulting services
- 85% Traveling, Regular client visits, good communication skills

**Job Title / Role:** Sr. Manager

**Main Goals:**
- Provide clients with necessary developments needed and the cost involved in implementing them and the timelines

**Main Tasks and Frequency:**
1. Interacting with Clients on regular basis
2. Gather requirements related to software Projects.
3. Provide clients with the details like
   a. Implementation timelines
   b. Budget required
   c. Resources
4. Get the updated billing rates with respect to multiple factors

**Needs:**
- Needs a handy tool
- Tool has to be up to date with latest billing rates
- Should have an option of E-Mail

**Stakeholders:**
- Main persons in contact during work:
  - Clients
  - Senior Management

**Pain Points:**
- Have to reach out to team to get the details that has to be communicated to the client.
- Get the latest billing and resourcing details.
- Validate the information with company standards.
- Multiple iterations with client

**For me, I would like to...**
make client meetings more fruitful by decreasing the response time and by avoiding multiple iterations
User Experience Journey

Current User Experience Journey

**Mindset**
- Gather all the requirements
- Discuss the estimates

**Actions**
- Meet client and discuss requirements
- Discuss estimates and delivery dates
- Take notes and email to team
- Take clients approval
- Mail the confirmation to management
- Plan for resources

**Touch Points**
- End Clients
- Remote teams
- Meetings
- Discounts
- E-MAILS
- Re Usability
- Mobile Device
- Client Approvals
- Management Approval

Duration of the Journey: 1 week

**Estimation Model**
- Another meeting with client
- Client adds few more requirements 😊
- Send requirements to the team
- Another meeting 😊
- Wait till the team responds back
- Keep the team ready
- E Mail requirements
- Meet client again
- Schedule another meeting with client
- Validate teams estimates
- Plan for resources
Mock Up

Screen 1:

Effort Estimation Model

SAP ABAP

SAP HR

<table>
<thead>
<tr>
<th>Object Type</th>
<th>Complexity</th>
<th># of Objects</th>
<th>Reusability (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Report</td>
<td>Low</td>
<td>2</td>
<td>0</td>
</tr>
<tr>
<td>Interfaces</td>
<td>Low</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Conversions</td>
<td>Low</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Enhancements</td>
<td>Low</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Forms</td>
<td>Low</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

Submit

Screen 2:

Effort Estimation Model

SAP ABAP

SAP HR

<table>
<thead>
<tr>
<th>Effort Category</th>
<th>Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Hours</td>
<td>210</td>
</tr>
<tr>
<td>Resources</td>
<td>2</td>
</tr>
<tr>
<td>Cost</td>
<td>4500 $</td>
</tr>
</tbody>
</table>

Estimate Break Up:

- Functional: 66 Hrs
- Technical: 103 Hrs
- Support: 41 Hrs

Splash/Build Prototype:

https://standard.experiencesplash.com:443/api/projects/9d0df56add1c1ea70ba9be20/prototype/snapshot/latest/index.html#/1458053290900_S0

Splash Study Link:

https://standard.experiencesplash.com/home/projects/9d0df56add1c1ea70ba9be20/research/participant/6e29003163a128880bda9a7f
Master-Detail template has been used to achieve the design requirement.

Header table will hold different types of Development areas and Items table will hold different types of development components, along with development components Items table will also hold other parameters like Complexity, Number of Objects and Re-Usability which are used to determine the final details which will be presented in the next view.

Detailed efforts of the development will be provided once after user selecting the submit button.
Detailed Efforts for the selection

User can navigate between different tabs to understand which component consumes how many hours, also user has provided with an option to unselect the components that he think are not needed for the project, based on that the total hours and linked resources and cost estimates should get updated real-time.

Detailed Summary for the developments which can be discussed with client

Icon Tab bar with different icons, each of them hold different components involved in the development

Different components of development with hour split up. By default, all the components will be selected but if client wants only specific components to be outsourced then total can be provided for only those components by un-checking the ones that are not needed.

Simple donut chart for graphical representation for the Breakup table displayed on the left.
Effort Estimation Model

Different components of technical development for offshore/onshore model projects, within this user can un-select certain components based on the needs.

User can also plan and discuss with the client real-time on who all resources will be working for the selected development work, based on client/project requirements, he can remove certain roles which are not required and change the locations for the roles which will adjust the overall hours/resources/estimates of the plan.
There is also an option provided to the user to email the details that has been discussed with the client or want to discuss with client or team.

With these options user will have the control to customize the contents of the mail based on the target audience in the email without even going to Mail broadcasting tools.

User will be provided an option to email the discussed details to different teams/clients.