



Collaborative Estimating

Responsible, Accountable, Communicated and Informed (RACI)

Shamraz Razzaq
Executive Consultant
PRICE Systems Ltd (UK Office)





Agenda

- Aim
- Best practise
 - Delivering services
- A possible methodology
 - RACI – What is it?
- What tool can help me here?
 - PRICE TruePlanning Client Server
- Summary
- Questions



Aim of this presentation

- To talk about improving the efficiency of the cost engineering process
 - Present a manual documented way of collaborative working to ensure a successful conclusion of a task
 - Implementation from PRICE Systems in TruePlanning (Client-Server) Capability

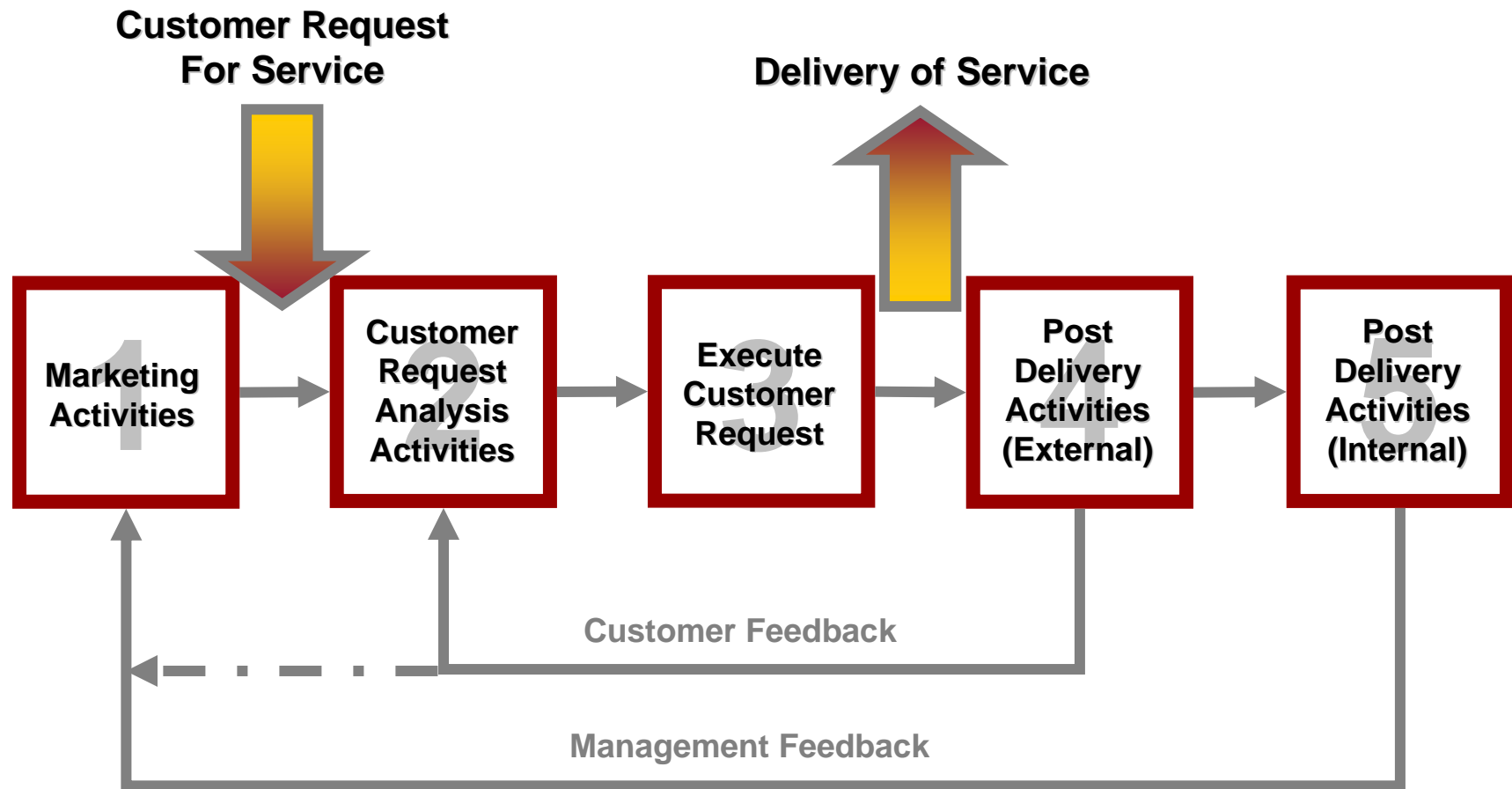


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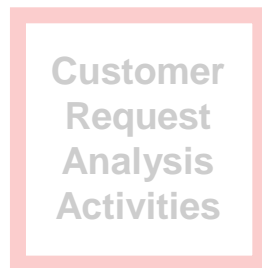
Top level flow - Service delivery





1. Marketing Activities

- Marketing of services
- Identifying potential market areas
- Develop strategy of obtaining business
- Details of task unknown (speculative)
 - Check on resources availability
 - Staff
 - Tools
 - Funding
- Learn from mistakes
 - Customer feedback
 - Management Feedback





2. Customer Request Analysis Activities

- Firm up activities from customer request
- Confirm resources availability
 - Allocate task manager
- Task manager to begin delegating work
- Learn from mistakes
 - Customer feedback
 - What did the customer not like about this phase last time we carried out a task

Marketing
Activities

**Customer
Request
Analysis
Activities**

Execute
Customer
Request

Post
Delivery
Activities
(External)

Post
Delivery
Activities
(Internal)



3. *Execute Customer Request*

■ Production of service

- Kick off meeting
- Prepare initial documentation i.e. Basis Of Estimate document
 - Agree assumptions & exclusions
 - Agree methodology
 - Agree tool set etc.
- Carry out estimates
 - As agreed with customer
- Review all deliverables with customer
- Deliver what was specified in the original customer request

Marketing
Activities

Customer
Request
Analysis
Activities

**Execute
Customer
Request**

Post
Delivery
Activities
(External)

Post
Delivery
Activities
(Internal)



4. Post Delivery Activities (External)

■ Post delivery of service

- Obtain critique from customer
- Ensure satisfaction
- Any additional work required/opportunities?
- Closure of task

Marketing
Activities

Customer
Request
Analysis
Activities

Execute
Customer
Request

Post
Delivery
Activities
(External)

Post
Delivery
Activities
(Internal)



5. *Post Delivery Activities (Internal)*

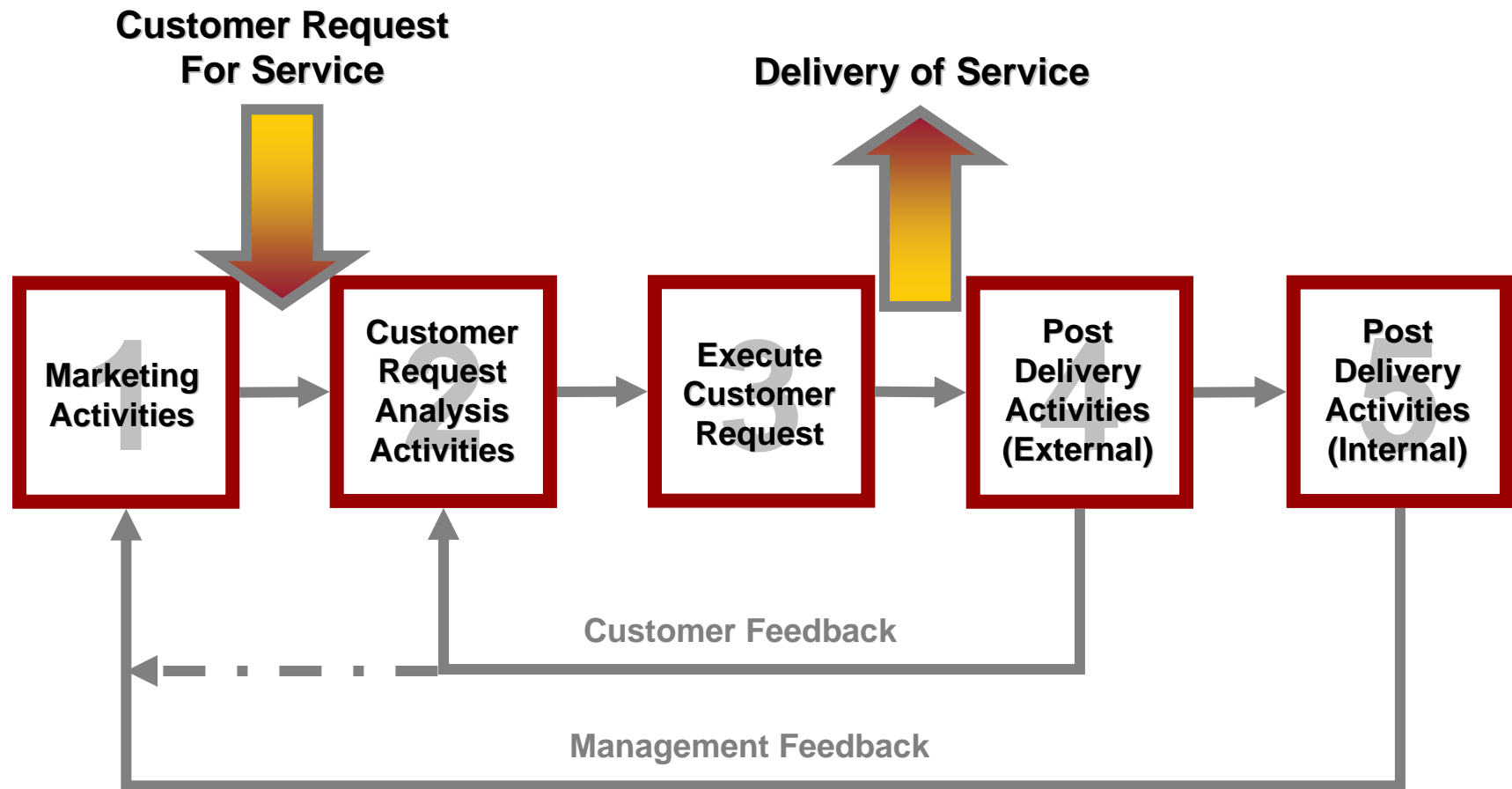
■ Capture

- Lessons learnt
- Efficiency in maintaining time and budget for task





Top level flow - Service delivery





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RACI

- A manual documented way of collaborative working to ensure a successful conclusion of a task
- What is RACI (pronounced Racy)?
 - Responsible – Identify people doing the work
 - Accountable – The buck stops here
 - Communicated – Two way interaction
 - Informed – One way interaction



3. Execute Customer Request – Estimate

	Senior Management	Task Manager	Mass Dept.	Design Dept.	ESTIMATOR	Finance	Customer	Commercial	Marketing
Activities or Decisions	I	R	A	A		R	C		
		I	R	R	A	R	R		
		I	C	R	A		C	R	C
		I	R	R	A		C		
	I	R	A	A	R	R		I	

R = Responsible

A = Accountable

C = Consulted

I = Informed

Many people

One person

Two way communication

One way communication

Work, reports or data required

"The buck stops here!"

Positive input, ideas or thoughts

Supplied with output



Wish List

- Any estimating tool will need to ensure;
 - RACI method viable – **Real Time** data access
 - Ability to **share the data** amongst management, colleagues, suppliers and customers alike
 - Utilises **latest software technologies** to ensure maximum compatibility with other commercial tools
 - Flexible environment that can be tailored to **different estimating methodologies**
 - Ability to provide a **quick management view** progress of all estimating tasks
 - Easy to use Graphical User Interface (GUI) - **minimum training** required
 - Security is maintained in **secure environments**



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PRICE TruePlanning Client-Server Capability

- With TruePlanning you can **share estimating models** across teams or functions
 - Encourage all Cost Engineers to share a **common Graphical User Interface (GUI)** – save time and cost on training
 - Motivate subject matter experts (Technical / Program / Financial) to **directly contribute** their cost drivers / parameter values and populate the estimate
 - Consistent cost modelling across the organisation introduced by utilising **common Cost Models** – save time and cost on model maintenance - either:
 - Commercial (True S / COCOMO, True IT, True H, True Systems /COSYSMO)
 - In-house (Custom built models)



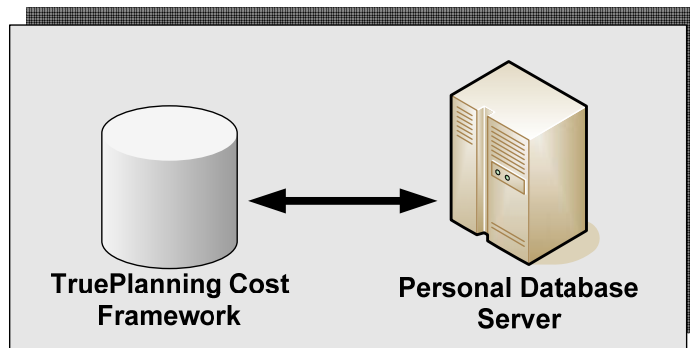
PRICE TruePlanning Client-Server Capability

- The ability to exploit **internal project estimates**.
 - The best, most accurate cost estimates are based on your **organization's past experiences captured** in your past estimates.
 - **Increased confidence** in estimates is based on estimates generated by the appropriate expert.
- A better way to **store estimates**.
 - **Easy access** to the latest project estimates.
 - Consistent, logical organization for **rapid searches and analysis**.
 - Easily maintainable because of the use of **industry standard technologies** (i.e. Search facility, SQL Database, Internet Browser, XML).
 - **Local or Shared Storage**

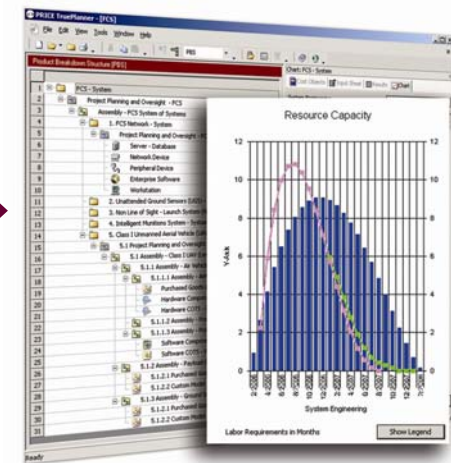


TruePlanning Configurations

STANDALONE



All residing on your local PC



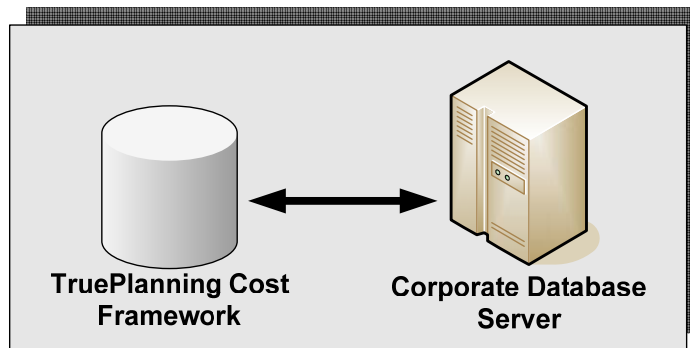
TruePlanning Graphical User Interface (GUI)

Today which doesn't resolve the communications issue!

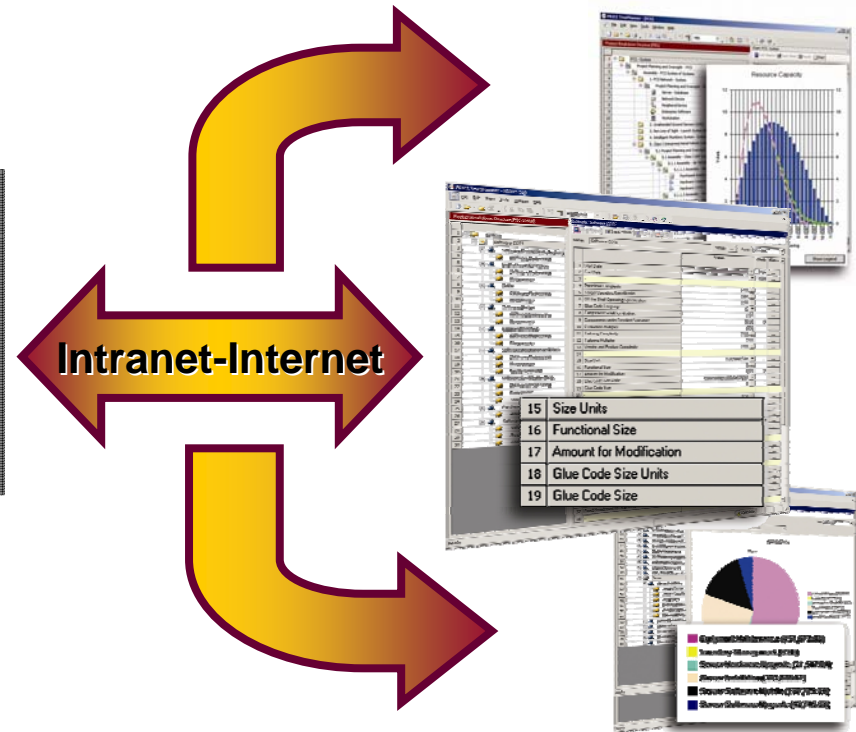


TruePlanning Configurations

CLIENT-SERVER



All residing on your Corporate and/or Remote server

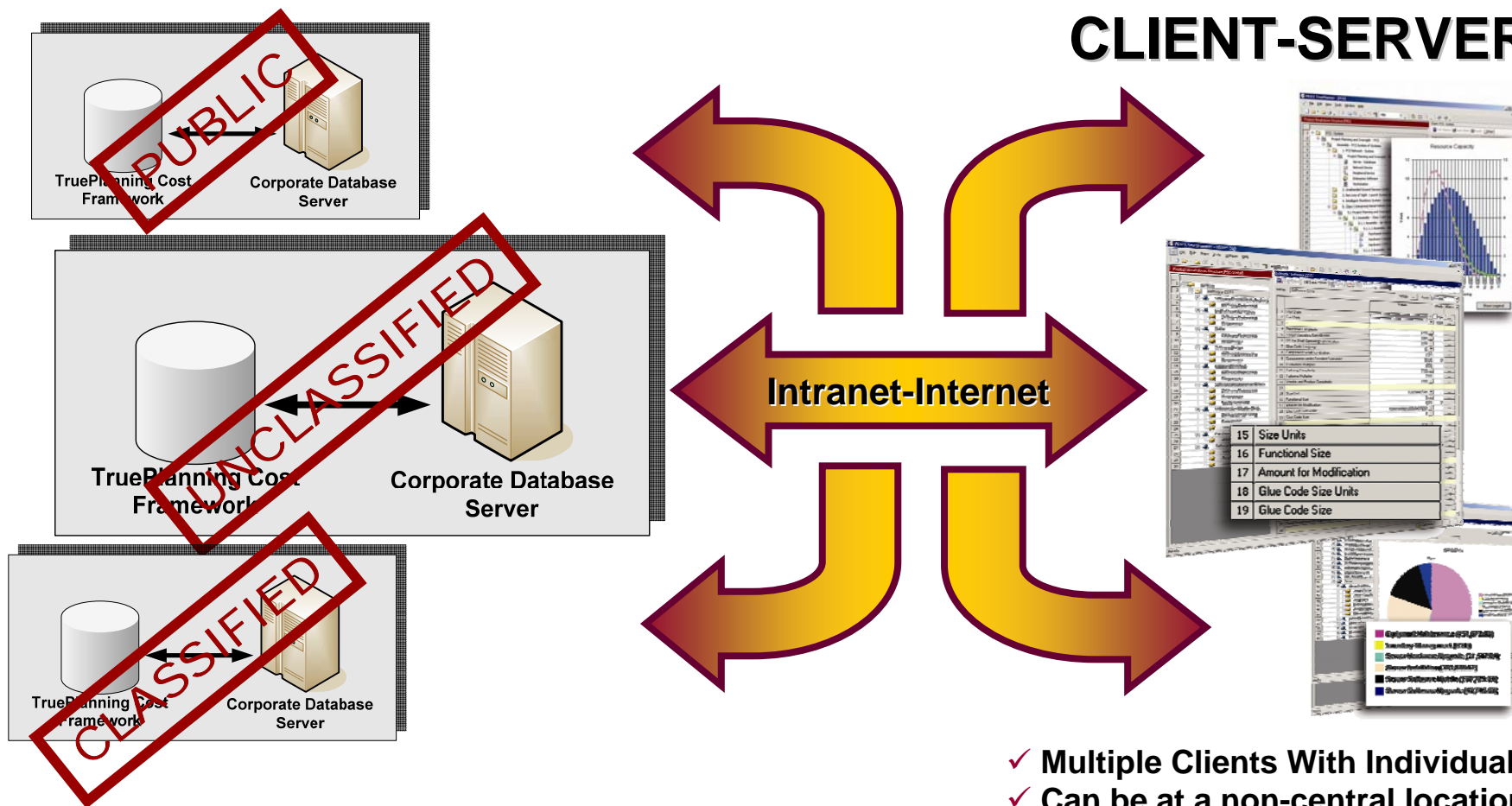


- ✓ Multiple Clients With Individual GUI
- ✓ Can be at a non-central location
- ✓ All utilising the same GUI



TruePlanning Configurations

CLIENT-SERVER



- ✓ Multiple Servers
- ✓ Can be at a non-central location
- ✓ Can be different networks

- ✓ Multiple Clients With Individual GUI
- ✓ Can be at a non-central location
- ✓ All utilising the same GUI

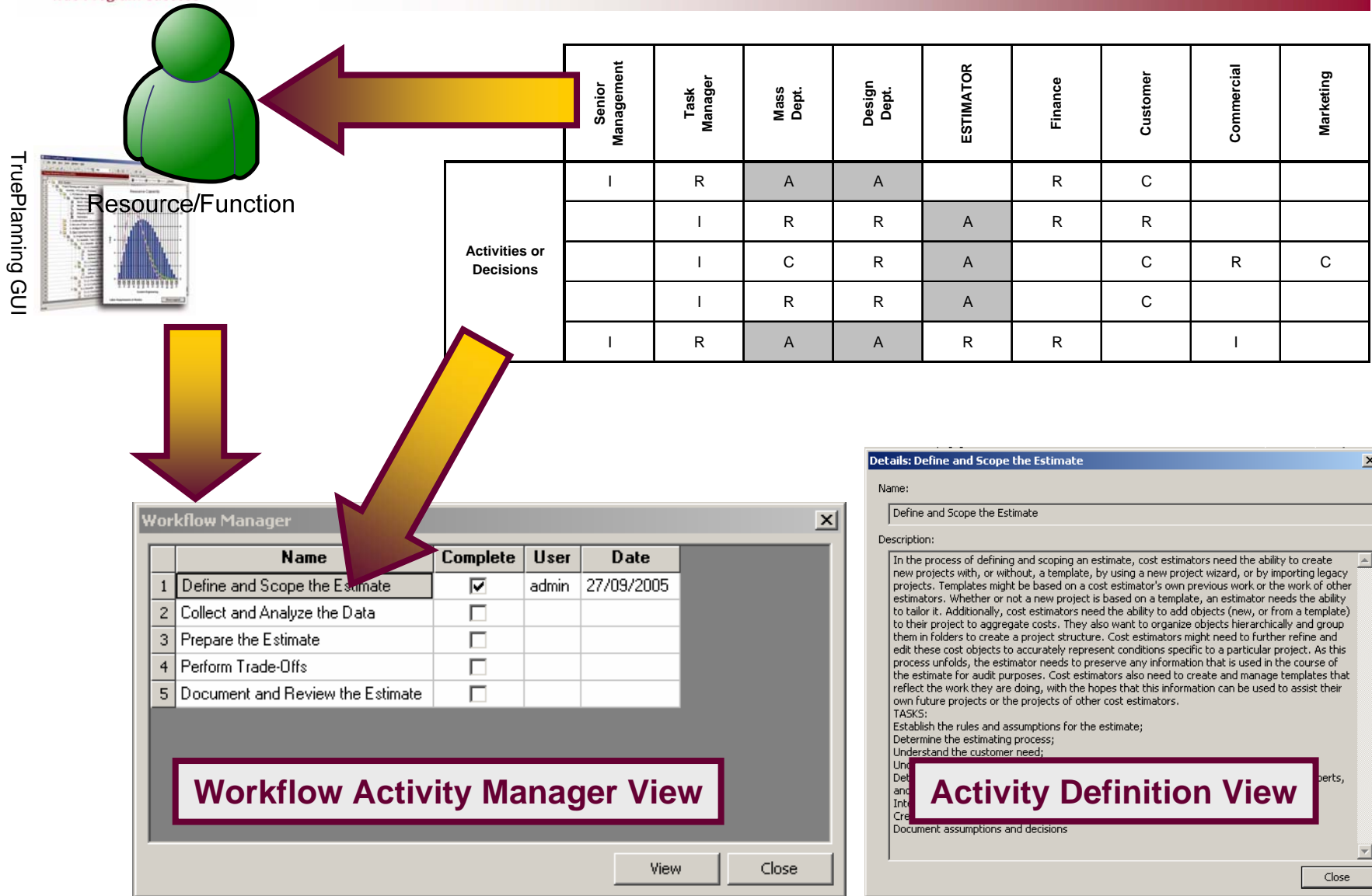


Workflow Management

- Workflow Management activities
 - Potentially **customisable** to suit project/team/circumstances
 - Define Workflow/Activities
 - Establish definition of each Workflow/Activities to aid users
 - Ability to **'check off' the work completed**
 - TruePlanning records when and by whom the activity was completed
- Gives management an **overview of the progress** including the estimated value



Workflow Management





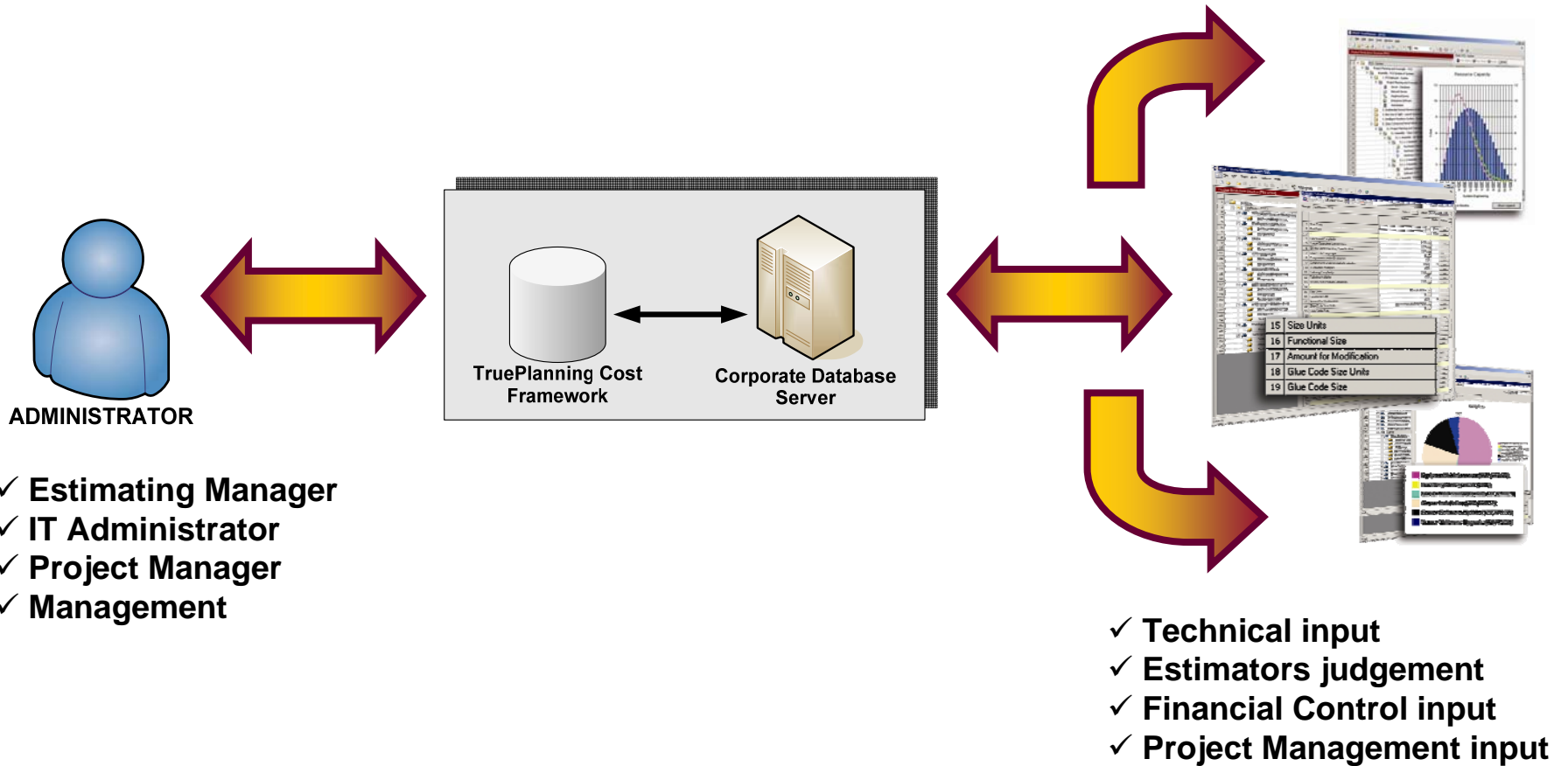
PRICE TruePlanning Client-Server Capability

■ Web capable (Internet Explorer) for administration:

- Creating and Deleting Users
- Creating and Deleting Passwords
- Monitoring workflow:
 - Cost Engineer responsible workload
 - Percentage of the work completed
 - Estimated value of Projects
 - Cost model(s) utilised
 - When the estimate was last modified



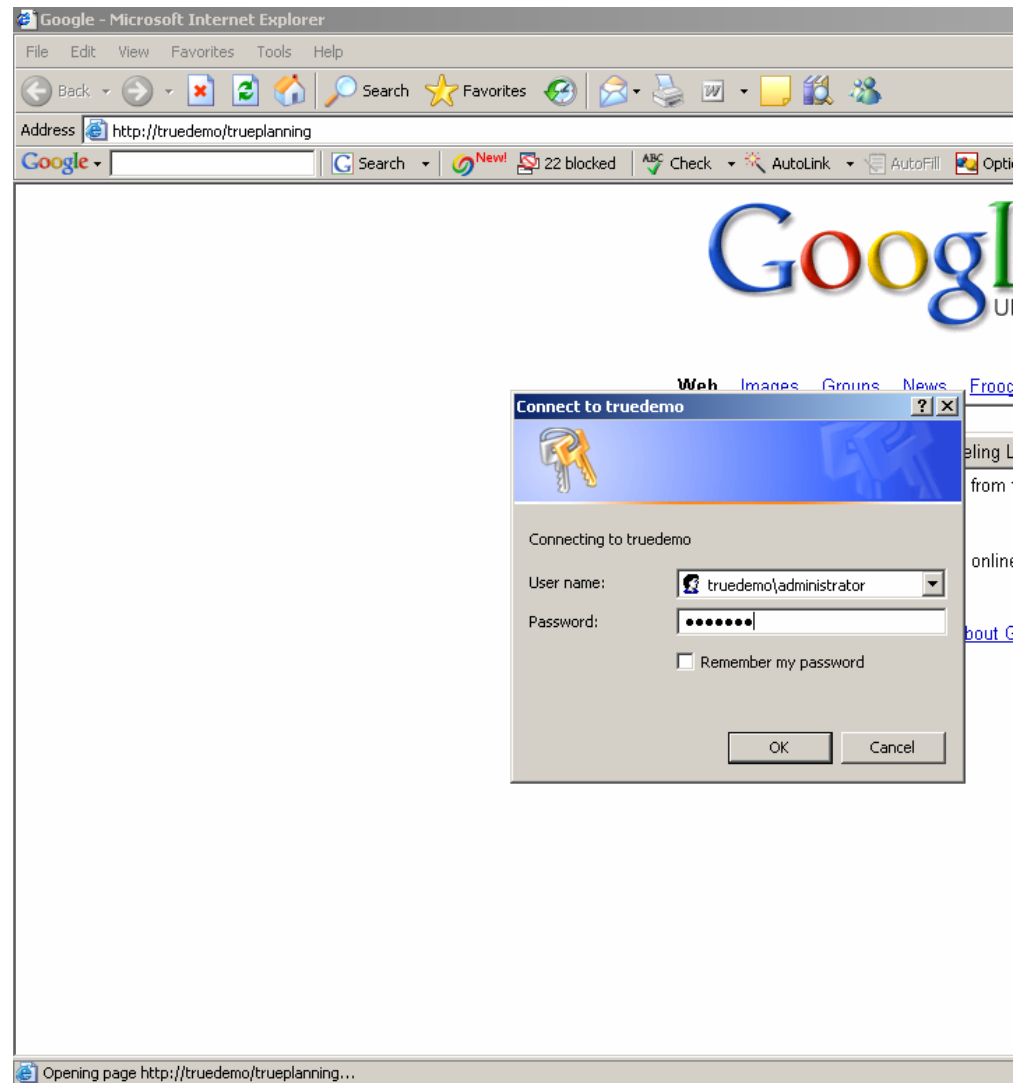
Administrative Control





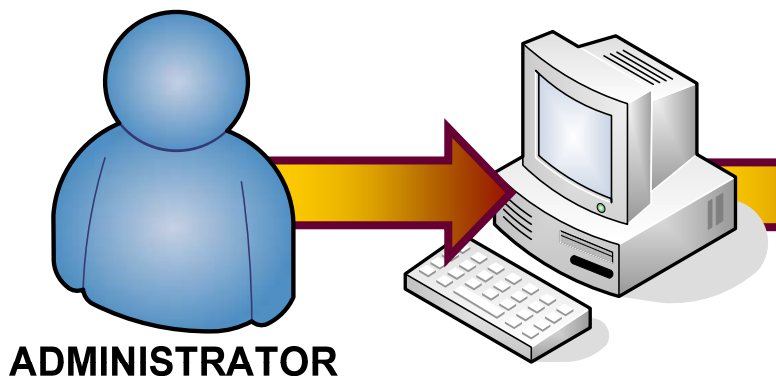
Administrative Control

- Accessed Using
 - Web browser (IE)
 - Username
 - Password
- Administrative functions
 - Set access levels
 - Usernames for individuals
 - Password for individuals
- Project Overview
 - Individuals work packages
 - Percentage complete
 - Project Value
 - Catalogs used to generate estimate
 - Date last worked on





Administrative Control (Current View)



Name	Percent Complete	Estimated Cost	Catalogs In Use	Last Modified
admin				
Template Data Center	0%	\$3,322,500	True IT 2006 b v189, True Universal 2006 b v3, True S 2006 b v265	-
marino				
Backup of Targeting Software CUR	100%	\$18,159,593	True Universal 2006 b v3, True S 2005 b v231	-
Targeting Software CUR	45%	\$18,159,593	True Universal 2006 b v3, True S 2006 b v265	1/20/2006 2:21:09 PM
Targeting Software v1	0%	\$18,159,593	True Universal 2006 b v3, True S 2005 b v231	-
Targeting Software v2	0%	\$18,159,593	True Universal 2006 b v3, True S 2005 b v231	-
Template Wheeled Truck	0%	\$66,145,286	True H 2006 b v85, True Universal 2006 b v3	1/20/2006 3:04:31 PM
mckenzie				
Bristol Data Center Deployment	40%	\$11,491,819	True IT 2006 b v189, True Universal 2006 b v3, True S 2006 b v265	1/23/2006 9:00:18 AM
Template Large Software	0%	\$18,159,593	True Universal 2006 b v3, True S 2005 b v231	1/20/2006 2:14:11 PM
Template Server Farm	0%	-	True IT 2006 b v189, True Universal 2006 b v3, True S 2006 b v265	-



Administrative Control (Possible Future View)

TruePlanning: A PRICE Systems Solution

File Edit View Favorites Tools Help

PROJECT EDIT VIEW TOOLS ADMINISTRATION HELP Welcome Michael Brooks

TruePlanning POWERED BY PRICE Research

PROJECT CENTER > My Projects Manage: Select

Project Name	% Complete	Projected to Date	Cost Objects in Use	Last Modified	By	In Use by	Owner	Connections in Use
Folder abc	Folder description to be displayed in this space							
Project 3	100%	\$ 1,000,000	True S 2005	Jun 14, 2005	Neal J.	Neal J.	David C.	Local, Server
Folder ghi	Tempor magna quis Neque porro quisquam est, qui dorem ipsum nostrud exercitaton dolor lorem ipsum dolor magna							
Folder 2005								
Project 1	100%	\$ 300,000	True S 2005, True H 2005	Jan 25, 2005	Rob F.	Ethan P.	Ethan P.	Local
Project 2	75%	\$ 1,000,000	True S 2005, True H 2005	Jun 14, 2005	Sam A.	Neal J.	Neal J.	Local, Server
Project 3	100%	\$ 2,000,000	True S 2005	Nov 24, 2004	Sue W.	Rob F.	Rob F.	Local
Project 4	75%	\$ 500,000	True S 2005	Nov 2, 2005	Michael B.	Michael B.	Sue W.	Local
Project 5	50%	\$ 300,000	True S 2005	Jun 17, 2005	Rob F.	Tony U.	Michael K.	Local
Project 6	0%	\$ 1,000,000	True S2005	Jul 22, 2005	Neal J.	Sam A.	Sam A.	Server
Folder jkl	Sed duo eiusmod tempor incididunt ut labore et dolore magna alia							
Folder mno								

Action: Select Enter Filter Name Save Filter

Notes Charts Project 4

Chart: Cost Profile Labor Cost Over Time Type: Vertical Bar (2D) X-Axis: Period Timescale: Quarterly

Cost

System

Currency in USD(\$) (as spent)

Internet



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Summary

- RACI methodology presented and reviewed
- TruePlanning Configurations – Standalone & Client Server
- Client Server enables
 - Sharing of estimates
 - Workflow monitoring
- TruePlanning implements the RACI methodology but in a real time and efficient manner
- Benefits of managing the workload of cost engineering



Thank you for your time – QUESTIONS?



Shamraz Razzaq
Executive Consultant
PRICE Systems Ltd.
Telephone: +44 (0)1256 760012
Email: shamraz.razzaq@pricesystems.com
www.PRICESystems.com