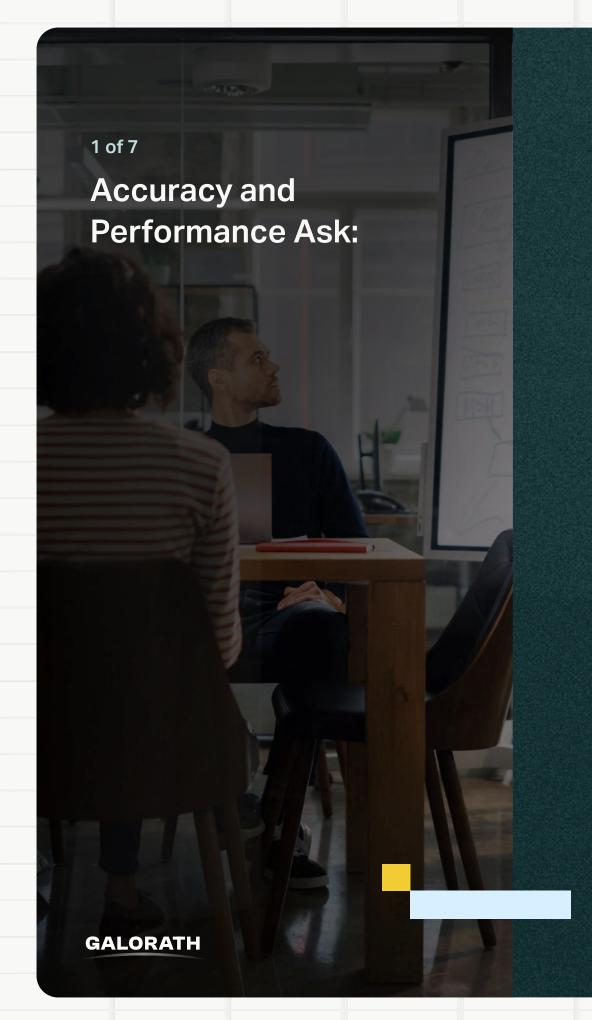




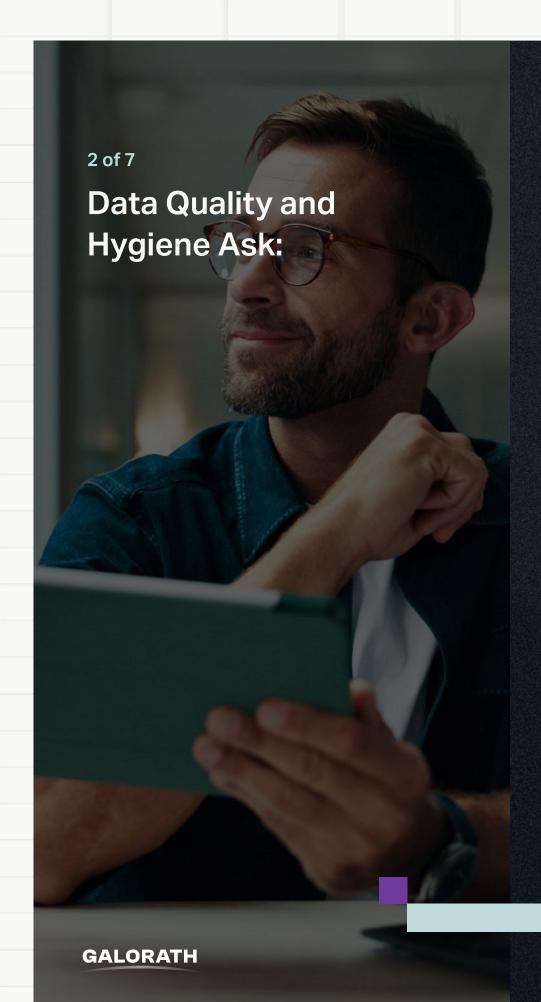
## Is Your Estimation Process Holding You Back?

Use this self-audit to assess your current cost and project estimation process across clarity, risk, efficiency, and business value.



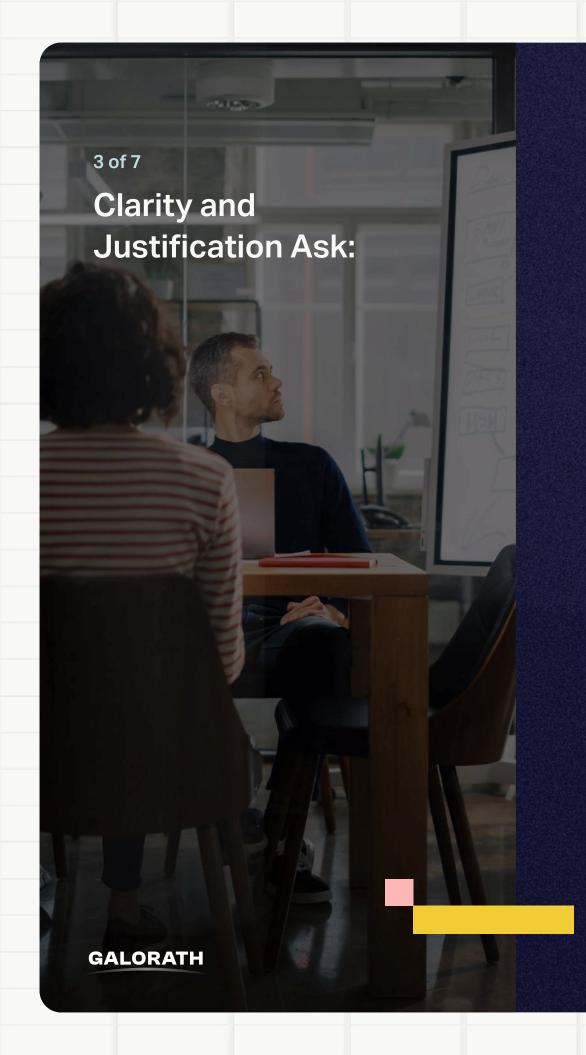
Are our estimates consistently dependable?

We know what percentage of estimates miss schedule or cost targets.	True	Partially True	☐ Not yet
We track rework due to inaccurate or outdated estimates.	True	Partially True	☐ Not yet
Estimates are credible and defensible across technical and executive stakeholders.	True	Partially True	☐ Not yet
Estimates support on-time approvals and planning milestones.	True	Partially True	☐ Not yet
We review historical accuracy to improve future projections.	True	Partially True	☐ Not yet



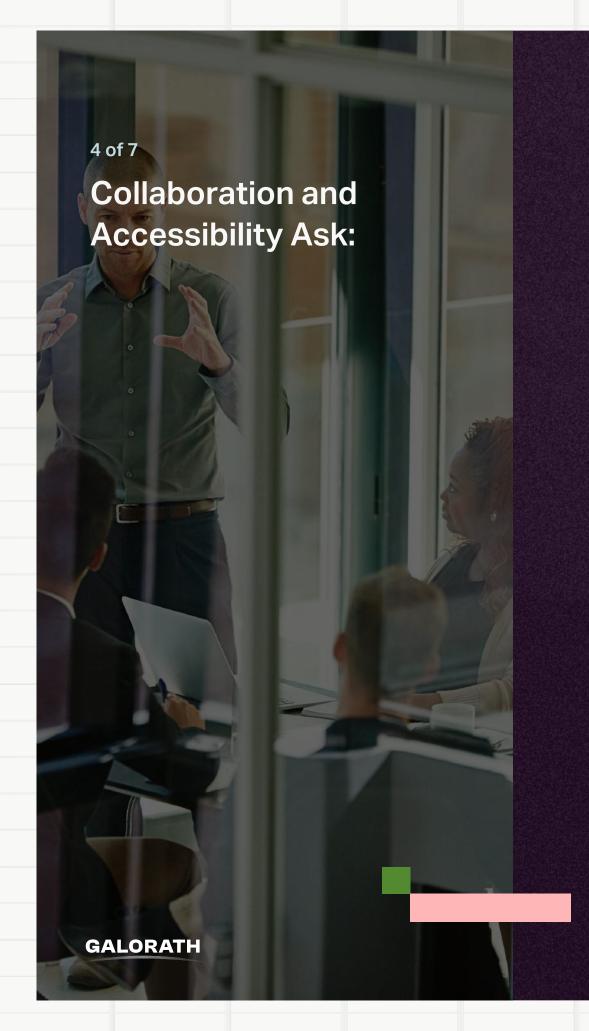
### Is our data consistent, trusted, and up to date?

Input data is validated and sourced from authoritative systems	True Partially True Not yet
We avoid copy/paste data transfers across systems	True Partially True Not yet
We maintain consistent naming, structure, and formats across teams	True Partially True Not yet
Version control is in place for inputs and outputs	True Partially True Not yet
Errors or inconsistencies are caught before estimates are finalized	True Partially True Not yet



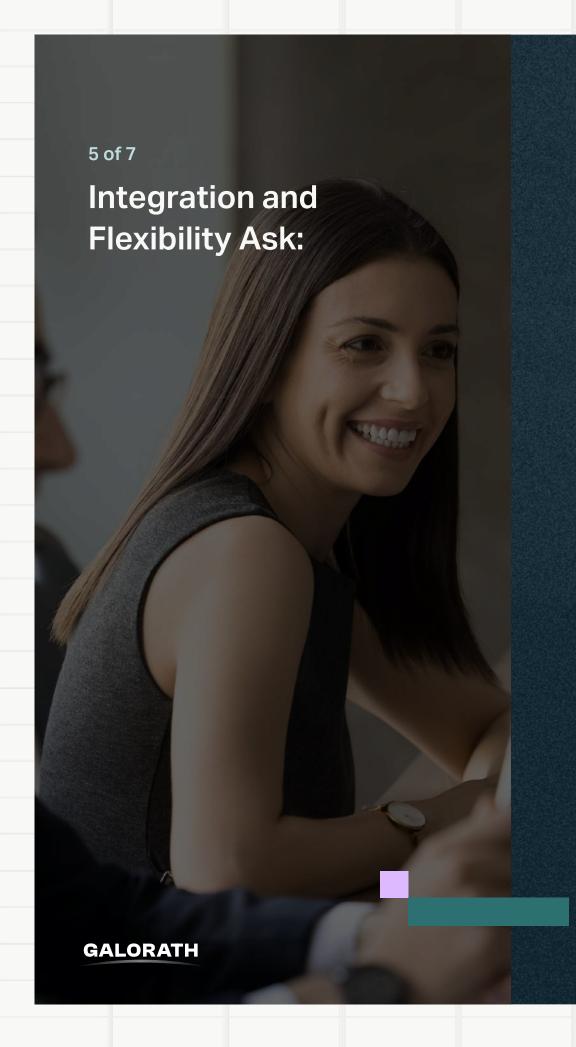
### Can we easily explain & justify our estimates?

Assumptions and logic are documented and accessible	☐ True ☐ Partially True ☐ Not yet
Estimates are traceable from output to input	☐ True ☐ Partially True ☐ Not yet
We can explain why a specific value or range was used	True Partially True Not yet
Past estimates can be reviewed and explained efficiently	☐ True ☐ Partially True ☐ Not yet
Confidence levels and contextual risk are presented with each estimate	True Partially True Not yet



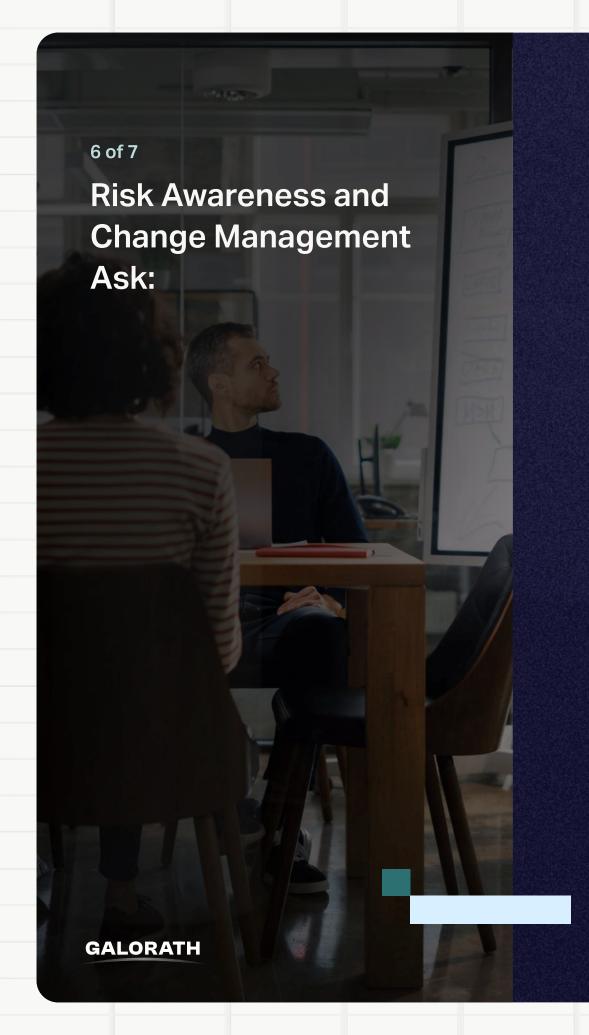
### Is estimation inclusive across teams?

PMO, engineering, and finance use the same core data and assumptions	True	Partially True	☐ Not yet
Engineering and finance align around shared priorities and timelines	True	Partially True	☐ Not yet
Stakeholders can access estimates in a format relevant to them	True	Partially True	☐ Not yet
Reviews involve cross-functional input early	True	Partially True	☐ Not yet
Technical and non-technical users can both engage with the data	True	Partially True	☐ Not yet



### Is our estimation process integrated with other systems?

Estimates are linked to ERP, PLM, PPM, or time-tracking systems	True	Partially True	☐ Not yet
Changes in scope or inputs are automatically reflected	True	Partially True	☐ Not yet
We can easily refresh a model based on live or updated data	True	Partially True	☐ Not yet
Estimate data supports procurement, planning, and governance processes	True	Partially True	☐ Not yet
We can run multiple scenarios from the same model	True	Partially True	☐ Not yet



### Can we respond quickly to change?

Risk is modeled alongside cost and schedule	True	Partially True	☐ Not yet
We can assess the impact of a design or supplier change in hours, not days	True	Partially True	☐ Not yet
Reforecasting happens regularly — not just when a crisis hits	True	Partially True	☐ Not yet
Project leads trust that estimates reflect current delivery risk	True	Partially True	☐ Not yet
We can simulate scope creep, staffing adjustments, or cost volatility	True	Partially True	☐ Not yet

# 7 of 7 Strategic Value and Readiness Ask: **GALORATH**

### Does our estimation process support the business as a whole?

Estimation is considered in board- level planning or investment decisions	True	Partially True	☐ Not yet
Outputs support funding approvals, investment cases, and compliance	True	Partially True	☐ Not yet
Our organization sees estimation as strategic, not just technical	True	Partially True	☐ Not yet
Leadership is engaged in improving the process	True	Partially True	☐ Not yet
We're exploring platforms or processes to scale and modernize	True	Partially True	☐ Not yet

## Tally Your Responses

For each of the seven sections, count how many items you marked as:

True

**Partially True** 

Not yet

This gives you a high-level snapshot of your estimation process maturity across performance, collaboration, and strategic value.

### Interpretation

Most items marked

True

This area is well-established and performing consistently

Most items marked

Partially True

There may be known issues or workarounds, worth exploring further

Most items marked

Not yet

This area could be introducing risk, delays, or misalignment across teams

ङ

Highlight any categories with 3 or more Not yet marks

These are your top candidates for improvement or modernization.