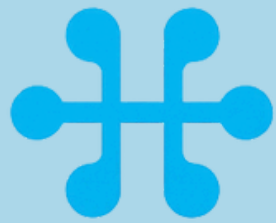# Business Bullet
Delivering better business outcomes

Ucentra
Estimation Framework

Playbook

Purpose of this Playbook

The Ucentra Estimation Process guides teams through a structured flow from understanding the work to tracking delivery.

Each stage builds on the last — moving from scoping, to effort estimation, to planning, and finally to tracking.

Ucentra provides a structured and transparent way for teams to collaborate in building their estimates — driving shared understanding, ownership, and continuous improvement.
Ucentra is built to:

- Create clarity
- Provide estimation structure
- Improve estimation accuracy over time
- Build reusable knowledge
- Encourage shared responsibility for estimates

Ucentra
Estimation Framework

CORE PRINCIPLES

↘ **Effort is driven by the work**

↘ **Elapsed time reflects real-world constraints and availability**

↘ **Use Case Models drive visibility of scope**

↘ **Transparency through assumptions, risks, and drivers**

↘ **Continuous learning from estimates vs actuals**

↘ **The most accurate and valuable estimates come from the people who will actually be doing the work.**

The Ucentra Estimation 4 STEP Process

S — Scope
Define and Visualise the Work
- Use Case Model Diagram
- Clarify scope boundaries
- Identify actors & systems

T — Tally Effort
Estimate Effort for Every Deliverable
- Use Case Estimation Workbook
- Complexity drivers
- Effort in days with assumptions & risks

E — Establish Plan
Map Effort Into a Realistic Delivery Plan
- Dependency Map
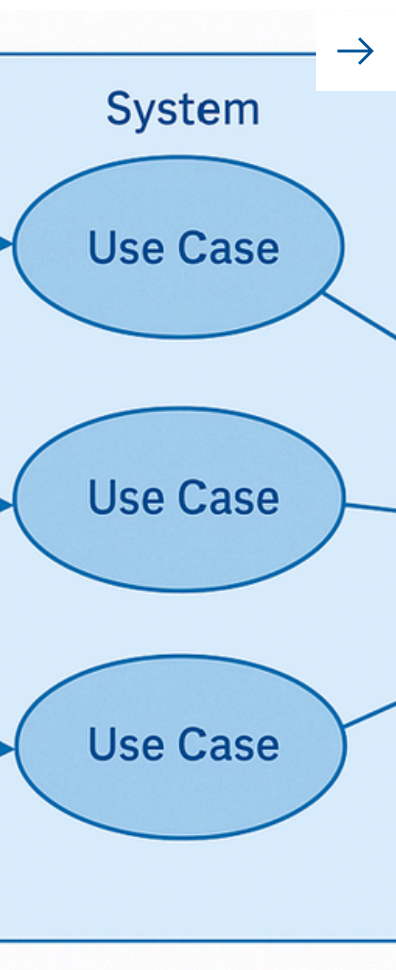- Project Plan with owners, dates, dependencies

P — Threat
Monitor Progress, Effort and Cost
- Resource Cost Tracker
- Variance tracking
- Learning loop

![Ucentra Estimation Framework]

STEP 1: Scoping — Define the Work

→

Create a Ucentra Use Case Model Diagram to visualise the scope of the project.

A Use Case Model is a visual or structured representation of the interactions between users (or systems) and the solution being developed. It captures the key goals users want to achieve (Use Cases) and the actors involved.
It includes:

- All Use Cases on a single page
- Human Actors (People)
- System Actors (Applications)
- Interactions between them

This model gives early visibility of:

- Scale
- Complexity
- Stakeholders involved

It sets the foundation for all estimation and planning activities.

STEP 2: Tally Effort

→ **Effort Modelling is about capturing structured, consistent estimates for all Use Cases — from all teams that will be required in the project.**

Every team involved should complete their assigned Use Cases directly within the Ucentra Estimation Workbook.

This ensures a consistent approach to capturing assumptions, risks, deliverables, and effort estimates — while maintaining a single source of truth across the project. The Estimation Workbook is structured to guide teams in thinking through all key effort drivers for each deliverable or Use Case, including size, complexity, assumptions, and stakeholder considerations.

Once all teams have completed their inputs, the workbook provides a consolidated view of the project's total estimated effort — by team, by deliverable — ready for planning and sequencing.

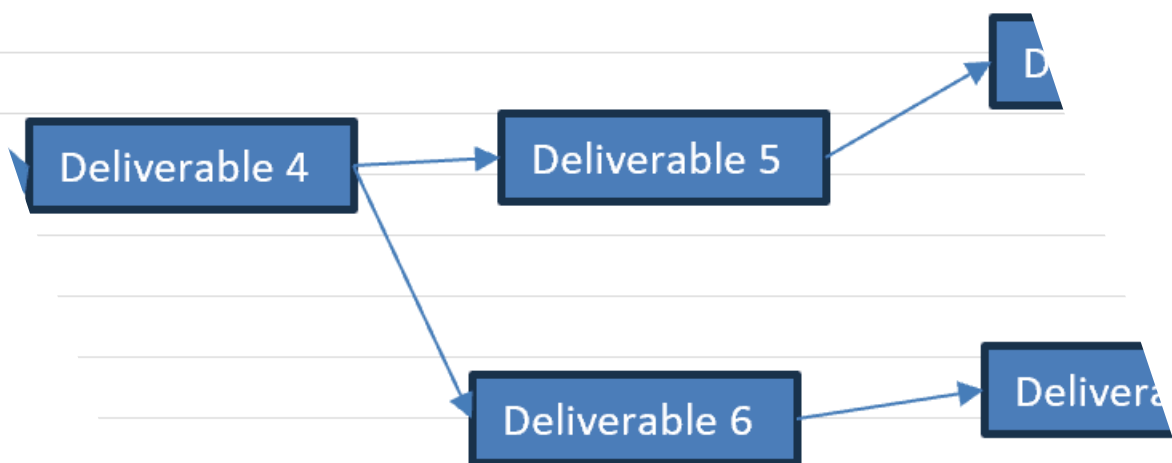| Field	Description	Answers
Use Case Name	Name or ID of the Use Case	
Use Case Description	Brief description of the functionality or goal	
Size (Simple / Medium / Complex)	Overall size classification	
Complexity Factors (Technical, Data, UI, Integration)	List key complexity factors influencing effort	
Stakeholders Involved	List of stakeholders impacted or involved	
Deliverables required	What outputs will need to be created to complete this use case? (e.g. Requirements Document, Process Flow, Wireframes, API Spec, Data Mapping etc.)	
Estimated Number of Meetings	Number and type of meetings required for this Use Case	
Reource Skill Level Required	Expected experience level needed from the resources	
Assumptions Made	List any key assumptions made for this estimate	
Risks Identified	List identified risks that could impact effort	
Dependencies	Dependencies on other teams, systems, or deliverables	
Estimated Effort (Days)	Effort estimate in working days	
Confidence Rating (High / Medium / Low)	Confidence level in the estimate provided	

STEP 3: Establishing the plan

→ **This step is about understanding how and when the estimated work can be delivered**

Translate effort into a realistic delivery plan using:
- Dependency Map — Visualise deliverables and their sequencing
- Project Plan — Build out the timeline, track deliverables, owners, status and dependencies

This is where dependencies, resource constraints, and real-world factors shape the plan.

STEP 4: Progress and Track

→ **Progress &Tracking supports delivery management, provides visibility for stakeholders, and enables valuable learning to improve future estimates.**

Key Activities in Tracking:

1. Monitor Progress of Deliverables
   - Track status: Not Started / In Progress / Completed
   - Update regularly in the Project Plan
2. Track Effort & Cost by Resource
   - Record actual effort per week against each deliverable
   - Compare estimated vs actual effort
   - Calculate costs and variances
   - Use the Resource Cost Tracker
3. Capture Variance & Learning
   - Record where effort differed from estimates
   - Capture reasons why (e.g. new scope, availability issues, added complexity)
   - Feed learning into future estimation work

UCENTRA TOOLS & TEMPLATES OVERVIEW

Tool	Purpose	Step
Use Case Model Diagram	Visualises project scope — showing Use Cases, Actors (people/systems), and interactions	Step 1 - Scoping
Estimation Workbook	Captures effort drivers and deliverables for each Use Case, while consolidating all team estimates into a single project-wide view.	Step 2 - Tally
Dependency Map	Visualises deliverables and their dependencies or sequencing	Step 3 - Establish plan
Project Plan	Maps deliverables to resources over time and tracks progress	Step 3 - Establish plan
Resource Cost Tracker	Tracks estimated vs actual effort and cost for each resource per week	Step 4 - Track

Ucentra
Estimation Framework

Tips for Success

- Always state assumptions
- Add tolerance for unclear scope
- Review past use case patterns
- Visualise your use case model early
- Share estimation rationale openly
- Update estimates regularly
- Capture learnings at regular intervals throughout the project, don't leave as an afterthought at the end
- Treat estimation as a collaborative activity, not a solo task

→

Ucentra
Estimation Framework

Final Thoughts

↘ **Ucentra is more than a set of templates.**

It's a mindset of structured thinking, evidence-based estimation, and continuous learning.
It enables teams to confidently explain what work needs doing, why it takes the time it does, and how those estimates were created.
For more resources and templates visit: www.businessbullet.co.uk