

# SLIM-Estimate® Validation Checklist

**Purpose:**

The SLIM estimation methodology promotes defensible estimates based on historical data that validate proven capability, both industry and organizational. Project scope, capability, and desired outcomes are used to produce multiple estimates where risk is explicitly calculated and assessed.

Use this simple checklist to assess the rigor of the estimate approach, supporting data, and assumptions. Identify areas for improvement in subsequent estimates.

**Validation Checklist:**

Use this checklist to identify project characteristics, such the business need and technical approach, input data and data sources, assumptions, and analyses performed.

Enter Y for Yes and N for No. Use the Comments section to supply additional detail and document special considerations.

(Y/N)	ESTIMATE CRITERIA or CHARACTERISTICS	COMMENTS
<i>PROJECT PURPOSE, DESCRIPTION, and GOALS (Who is asking for this estimate and why?)</i>		
	Project stakeholders are clearly identified	
	Business need and priority are clearly identified	
	Project goals and constraints are known and prioritized <i>(check all that apply)</i>	
	<ul style="list-style-type: none"> <li>• Schedule / Duration</li> </ul>	
	<ul style="list-style-type: none"> <li>• Effort</li> </ul>	
	<ul style="list-style-type: none"> <li>• Cost</li> </ul>	
	<ul style="list-style-type: none"> <li>• Team Size / Staffing</li> </ul>	
	<ul style="list-style-type: none"> <li>• Quality</li> </ul>	
<i>LIFECYCLE METHODOLOGY &amp; TECHNICAL APPROACH (Industry default or calibrated?)</i>		
	QSM Default used	
	Specific development methodology is required	
	Phases, activities, and milestones used support the development methodology	
	Phase names and acronyms match organization’s environment <i>(speak their language)</i>	

(Y/N)	ESTIMATE CRITERIA or ATTRIBUTE	COMMENTS
	<b>INPUT DATA &amp; SOLUTION METHODS</b> <i>(Industry default or calibrated? What do you know?)</i>	
	SLIM Out-of-the-box (Unconstrained) <i>User Input = Size, PI, Phase Tuning Output = Duration, Effort</i>	50% Solution
	Typical (Trend Based) <i>User Input = Size System Input = Duration, Effort Output = PI</i>	50% Solution
	Typical (Solve From Trends) <i>User Input = Size System Input = Duration, Effort, Phase Tuning Output = PI</i>	50% Solution
	Optimized for Single Goal (Design to Input) <i>User Input = Size, PI, Phase Tuning, Goal (e.g., Duration, Effort, Cost, Staffing, Quality) Output = Remaining Unknowns</i>	50% Solution
	Time Boxed (Solve for Size) <i>User Input = PI, Duration, Effort or Staffing Output = Size</i>	50% Solution
	Bid Evaluation, Replay (Solve for PI) <i>User Input = Size, Duration, Effort or Staffing Output = PI</i>	50% Solution
	Flexible Risk Buffered (Constrained) <i>User Input = Size, PI, Phase Tuning, Goal and Desired Probability Output = Goal and Calculated Probability, Remaining Unknowns</i>	Risk Gauge enabled
	Fixed Risk Buffered (Contingency Plan)	Displays higher assurance derived from any 50% Solution
	Other User Inputs <i>(check all that apply)</i>	
	<ul style="list-style-type: none"> <li>Size Uncertainty Range (consistent w/lifecycle stage)</li> </ul>	
	<ul style="list-style-type: none"> <li>PI Uncertainty Range (consistent w/lifecycle stage)</li> </ul>	
	<ul style="list-style-type: none"> <li>PI Adjustment (Special considerations or challenges)</li> </ul>	Adjust PI when Size changes
	<ul style="list-style-type: none"> <li>Defect Tuning Factor (from organization's history)</li> </ul>	
	<b>SIZING</b> <i>(Check all that apply)</i>	
	Scope is conceptual and not well documented	
	Scope is well documented, enabling Function Unit count	
	Size estimate supplied by Subject Matter Experts	
	Function Units and Gearing Factors based upon QSM data	
	Function Units and Gearing Factors consistent with like projects in organization's historical database	

<b>BASIS OF ESTIMATION</b> <i>(Industry or Organization History)</i>	
QSM Trend Group or Trend Mix is the source of ALL key input data	Trends used:
QSM Trend Group or Trend Mix is the source of SOME key input data	Trends used:
Core metrics from organization's history (completed projects) are identified and loaded	
Comparison to History Analysis performed	
History Tuning solution calculated (PI, MBI Phase Tuning, DTF)	
<b>ALTERNATIVE SOLUTIONS</b> <i>(Explore potential outcomes)</i>	
Size - Best & Worst Case	
Team Size / Staffing - Best & Worst Case	
Duration - Best & Worst Case	
Effort / Cost - Best & Worst Case	
<b>RECOMMENDED SOLUTION</b> <i>(Select commit-to solution(s) based project goals and risk)</i>	
Best Case – Most optimistic	
Most Likely – Consistent with history; realistic	
Worst Case – Most conservative	

NOTES: