

body { font-family: 'ArialUnicode'; font-size: 11pt; line-height: 1.35; } h1 { color: #0B3558; font-size: 20pt; margin-bottom: 6pt; } h2 { color: #0B3558; font-size: 14pt; margin-top: 12pt; } h3 { color: #0B3558; font-size: 12pt; margin-top: 10pt; } p { margin: 4pt 0; } ul { margin: 0 0 6pt 18pt; } ol { margin: 0 0 6pt 20pt; } table { width: 100%; border-collapse: collapse; margin-bottom: 8pt; } th { background: #F0F4F8; font-weight: bold; } th, td { border: 0.5pt solid #D3DADF; padding: 4pt; } blockquote { border-left: 3pt solid #0B3558; padding-left: 6pt; color: #333; }

# Workflow Playbook – Development Estimation

Goal: Deliver assumption-free, executable development scenarios (including infra/AI implications) for Sales within 5 business days.

## 1. Quick Reference

- Trigger: Product/change/infra inputs submitted for estimation.
- Exit: Scenario pack delivered to Sales or estimation blocked with documented gaps.
- Owner: Delivery Owner.
- SLA: 5 business days from acceptance of inputs.

## 2. Input Pathways

Choose one pathway; ensure all required artifacts exist.

Path	Required Docs
A – Full product scope	Product doc, delivery scenario or roadmap, validated design.
B – Change scope	Change specification, updated design if impacted.
C – Infra change	Infrastructure change brief + relevant tech context.

Gate Checklist - [ ] Inputs mapped to Path A/B/C. - [ ] Ownership + stakeholders confirmed. - [ ] No assumptions required (if yes → request clarification).

## 3. Roles & RACI

Activity	Delivery Owner	Project Lead	Tech Lead	Staffing Manager	AI PO / AI Tech	Sales (Client Interface)	Quality Guardian
Input sufficiency review	A/R	C	C	C	C	C	I
Build scenarios	A/R	R	R	R	R	I	I
15-week enforcement	C	C	A/R	C	I	I	I
Infra & staffing estimates	C	I	C	A/R	I	I	I
Package for Sales	A/R	C	C	C	C	R	C

## 4. Phase Details

State 0 – Estimation Readiness Check (Owner: Delivery Owner, SLA 0.5 day)

Checklist - [ ] Inputs categorized (A/B/C) with source links. - [ ] Ambiguities/questions logged. - [ ] Decision recorded (Proceed / Blocked) with timestamp.

If blocked: send gap report to Sales within 4 hours.

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## State 1 – Scenario Construction (Owner: Delivery Owner, SLA 3 days)

Steps 1. Baseline scenario – PPL drafts 1-person-per-role plan, timeline, dependencies, high-level risks. 2. 15-week rule – Tech Lead validates duration  $\leq 15$  weeks. If longer, create alternative scenario with increased capacity; capture trade-offs. 3. Infrastructure integration – Staffing Manager + Tech Lead document infra setup, tooling, security/compliance, cost ranges (CapEx + OpEx). 4. AI impact (if applicable) – AI PO/Tech adds data, model, governance considerations, annotation needs. 5. Risk scoring – Use standard risk heatmap (complexity, dependency, environment, team availability).

Artifacts - Scenario workbook (sheet) with baseline + accelerated options. - Risk & assumption log.

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## State 2 – Estimation Consolidation (Owner: Delivery Owner, SLA 1.5 days)

Checklist - [ ] Internal coherence review with PPL + Tech Lead complete. - [ ] Quality Guardian formats client-safe pack (no internal rates, includes scope summary, staffing profile, timeline, risks, infra notes). - [ ] Sales brief prepared (talk-track, comparison between scenarios, blockers). - [ ] Version stored in repository with date + author.

Exit: Sales acknowledges receipt; CRM updated.

## 5. KPIs & Controls

- SLA adherence:  $\geq 90\%$  estimations delivered within 5 business days.
- Assumption-free rate: 100%; if assumptions discovered post-handover, log incident.
- Scenario accuracy: Variance between estimated vs actual duration  $< \pm 20\%$  (tracked quarterly).

## 6. Templates & References

- Input validation form.
- Scenario workbook template (includes 15-week calculator).
- Risk heatmap template.
- Sales handoff deck template.

## 7. Escalation Paths

- Missing inputs → escalate to Sales Director after 2 business days.
- Infra blockers → trigger Infrastructure Change workflow before publishing scenarios.
- AI compliance concerns → notify Governance/Legal.