Task estimation worksheet

Estimate one task from past work, check its finish date, and compare the forecast with the actual result.

Use pages 1 and 2 together. Separate active work from elapsed time. The range is a planning judgment, not a statistical confidence interval.

Define the output

Task and date estimated _____

Finished output and required checks _____

_____

Outside scope _____

Start with comparable completed work

Choose similar scope, familiarity and review needs. Use records where possible; label remembered times as rough. Three examples are a starting point, not a reliable statistical sample.

Past task and source	Active effort	Elapsed time	Important difference

Typical result and spread _____

Adjustment and evidence _____

_____

Check necessary stages

Stage and included work	Effort range	Dependency or uncertainty
Inputs and checks		
Production		
Verification and revision		
Handoff or other work		

Total range _____ Central planning estimate _____

Does this agree with the comparable tasks? Check missing work and double-counted allowances.

Turn effort into a finish date

Task _____

Map dependencies before promising a date

Input or review needed	Owner and expected timing	What it blocks

Which waits can overlap other work? _____

_____

Check usable capacity

Available active hours by day _____

Existing commitments accounted for _____

Planned work sequence and review window _____

_____

Tentative finish date or range _____

Assumptions to confirm and with whom _____

Checkpoint and change trigger _____

_____

Complete this after the task

Original forecast	Actual result	Reason for difference
Effort:		
Start and finish:		
Scope and quality:		

Actual effort ÷ original central effort estimate = _____

Use the same units and scope. Above 1 means more effort than forecast; below 1 means less. Record changed scope separately.

One adjustment to the next similar forecast _____

_____

Estimate a short report

Maya is preparing an internal recommendation. These numbers are invented to demonstrate the worksheet; they are not measured results or recommended time limits.

Output and boundaries

Required output: A two-page recommendation using existing data, with three checked findings, one review round, and an editable final file.

Outside scope: A slide presentation, new interviews, and extra review rounds.

Comparable completed reports

Past task and source	Active effort	Elapsed time	Important difference
Report A; time log	5 hours	3 workdays	Familiar data.
Report B; time log	6 hours	4 workdays	Familiar data.
Report C; time log	7 hours	5 workdays	Familiar data.

All three totals include one revision round. The middle effort is 6 hours; the observed range is 5–7 hours. That small set is useful context, not a probability model.

Current difference: An unfamiliar data check adds an estimated 1–2 active hours. Initial adjusted effort range: 6–9 hours.

Check the estimate against necessary stages

Stage	Effort range	Included work
Check inputs	1–1.5 hours	Validate definitions and inconsistencies.
Analyze findings	2–3 hours	Compare results; select supported findings.
Write draft	2–3 hours	Recommendation and evidence summary.
Review and finalize	1–1.5 hours	Read feedback, correct, check final file.

Total effort range: 6–9 hours. Central planning estimate: 7.5 hours. The midpoint is a working choice, not a calculated expected value.

The breakdown agrees with the adjusted comparables. Routine revision is already included, so Maya does not add a second blanket revision allowance.

Early checkpoint

After the first data-check block, confirm whether the input can be validated. If not, identify the missing information and revise the forecast before continuing on an unreliable assumption.

Schedule and calibrate

Continue Maya's example by separating active effort from the wait for review.

Dependencies and capacity

Dependency	Expected timing	Effect on the plan
Validated input data	First working block	If unresolved, flag the missing input and revise the forecast.
Reviewer receives draft	Thursday morning	Confirm the reviewer can accept it then.
One review round	Two working days	Feedback expected the following Monday; final work waits for it.

Available capacity: Two usable active hours each working day, after existing commitments. The central estimate needs nearly four days of active capacity.

Working sequence: Use Monday through Wednesday and part of Thursday for inputs, analysis, and the draft. Reserve finalization capacity for the following Monday after feedback.

Tentative handoff: The following Monday, conditional on validated data and the agreed review window. Confirm availability before making a commitment.

Two days waiting for feedback are not two days of Maya's active effort. The waiting period may overlap other tasks, but it still affects when this report can finish.

Completed review

Original forecast	Fictional actual result	What to learn
6–9 active hours; central 7.5	8 active hours	Inside the range. Data validation used the high end of its allowance.
Following Monday, conditional	Finished the following Monday	The review window held.
Defined report; one review round	Same scope and required checks	Comparable enough to add to the next forecast.

Effort ratio: 8 ÷ 7.5 = approximately 1.07. The task used slightly more effort than the central estimate, while remaining inside the planning range.

Next forecast: Retain the data-validation stage explicitly and compare it with similar data work. Do not multiply every unrelated task by 1.07 based on one result.

Use the record again

Save the original scope, range, actual effort, elapsed timing, and explanation together. If scope changes, record the extra work separately so the next comparison remains meaningful.