

## Levels and checkpoints

The levels for *Estimating and planning* are typified as follows:

- **Controlled:** *The amount of resources per activity required is predicted.*
- **Efficient:** *Formal techniques make estimating and planning reliable.*
- **Optimizing:** *Estimating is based on experience data from the organization.*

Please find the checkpoints below.

### Controlled

1. For test effort estimation, simple techniques are used such as ratios.
2. For each test activity there is an indication of the period in which it runs, the resources required and the products to be delivered. Activities to be identified are: test planning and management, defining test cases and executing test cases.
3. The dependencies between test phases or test activities are plotted in a test planning. A certain overlap of test phases and test activities is allowed.
4. Test estimations and test planning are discussed with the principal stakeholder.

### Efficient

1. To be as accurate as possible, at least two estimating techniques are used.
2. The test phases and/or test activities are estimated and planned, using formal techniques.
3. Metrics are used to support the estimating and planning activities.
4. The test planning includes a testability review of the test basis and the evaluation of the test project.

### Optimizing

1. The test planning includes the conservation of testware for future reuse.
2. A set of estimation techniques and principles are maintained at an organizational level. Key figures/data for the defined estimation techniques are provided at an organizational level.
3. Test process management is regularly evaluated, internally (by the test organization) and with stakeholders.

(Source: “TPI Next, Business Driven Test Process Improvement” ISBN 9072194977)

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