


# Estimating Projects




## Estimating Projects

For Time and Cost

By: Rick Teplitz  
Multi-disciplinary Writer & Translator  
rick@englishcommunicator.com


© 2007 Rick Teplitz. All rights reserved.



## Contents

- ▣ General Considerations
- ▣ In-house vs. Freelance
- ▣ Work Types
- ▣ Deliverables
- ▣ Determining Assets and Scope
- ▣ Online Help Time Factors
- ▣ Listing Document Requirements
- ▣ Estimating Project Time
- ▣ Workflow
- ▣ Other Notes on Writing
- ▣ Pricing Projects


© 2007 Rick Teplitz. All Rights Reserved.



## General Considerations

- ▣ No formula can replace knowing yourself and evaluating your environment
- ▣ Always add a buffer for safety (e.g. add 15% to all time estimates)
- ▣ Workflow:
  - Differs from workplace to workplace
  - Differences between in-house & freelance


© 2007 Rick Teplitz. All Rights Reserved.



## In-house vs. Freelance

- ▣ In-house
  - Typically part of actual development. Sit in on various meetings, help define software, UI, messages, etc.
  - Possess a good understanding of product
  - Usually begin writing before product is finalized
  - Work needs to be reviewed by other parties (documentation manager, QA, development, etc.)
  - Usually work to meet a deadline (I'm not consulted!)
- ▣ Freelance
  - Usually asked to provide a time estimate
  - Have a more superficial understanding of the product
  - Usually write about finished product
  - Spend more time waiting for responses, communication


© 2007 Rick Teplitz. All Rights Reserved.



## Work Types

- ▣ **Writing** from scratch
- ▣ **Editing** existing material
- ▣ **Updating** material with new and updated modules & features
- ▣ **Converting** existing material to online help

© 2007 Rick Teplitz. All Rights Reserved.



## Deliverables

- ▣ User Manuals
- ▣ Online Help
- ▣ Readme and Quickstart Documents
- ▣ Release Notes
- ▣ API Documentation
- ▣ White Papers

© 2007 Rick Teplitz. All Rights Reserved.

# Estimating Projects

**Determining Assets and Scope**  
Do Your Homework

- ▶ Obtain existing materials: MRS, FRS, other background material (softcopy if available)
- ▶ Extract info from SMEs
- ▶ If freelancing:
  - Learn about company & technology (be aware of learning curve)
  - Obtain source files and templates for existing user manuals and OLH
  - Obtain application if possible

7

© 2007 Rick Teplitz. All Rights Reserved.

**Determining Assets and Scope**  
Examine the Application

- ▶ Access all options and list:
  - Menus, menu options, toolbars and buttons
  - Features and tasks
  - Dialog boxes
- ▶ Determine if application is simple or involves complex concepts which require explanation
- ▶ Don't be afraid to ask questions
- ▶ Put in the footwork. Freelancers, there's no avoiding going into the office, speaking with SMEs

If you don't understand the product, your audience won't either!

8

© 2007 Rick Teplitz. All Rights Reserved.

**Determining Assets and Scope**  
Know your Speed, and Theirs

- ▶ **Writing new features / tasks** : 1-2 days/feature
- ▶ **Editing existing material**: 1-5 pages per hour
- ▶ **Creating online help**:
  - When written using a single-sourcing tool and existing template: 2-3 days
  - Importing and formatting: 4-5 days
- ▶ **Preparing index**: simple vs. thorough 1-5 days

Require review by QA? Factor into time estimate.

9

© 2007 Rick Teplitz. All Rights Reserved.

**On-line Help Time Factors**

- ▶ **RoboHelp / Flare**: created in editor vs. importing and formatting
- ▶ **WebWorks / AuthorIT**: using existing templates vs. creating new templates
- ▶ **Additional factors**:
  - Require advanced features: e.g. hotspots, hyperlinks and popup images?
  - Require context sensitive help? (need to coordinate with development and map topic aliases)

10

© 2007 Rick Teplitz. All Rights Reserved.

**List Document Requirements**

<ul style="list-style-type: none"> <li>▶ <b>Cover page</b></li> <li>▶ <b>TOC</b></li> <li>▶ <b>Introduction &amp; overview</b></li> <li>▶ <b>Installation &amp; setup</b></li> <li>▶ <b>Interface</b> (buttons, menus, etc.)</li> <li>▶ <b>Using the product</b> (features and tasks)</li> </ul>	<ul style="list-style-type: none"> <li>▶ <b>Configuring options</b></li> <li>▶ <b>Additional modules</b> (CLI, Glossary, etc.)</li> <li>▶ <b>Index</b> (simple or detailed)</li> <li>▶ <b>Online help</b> (simple or advanced)</li> </ul>
--	---

11

© 2007 Rick Teplitz. All Rights Reserved.


**Estimating Project Time**  
Breakdown (based on size and requirements)

Requirements	Days
▶ Cover page, TOC, Introduction & Overview	3
▶ Installation & Setup	2
▶ Interface	2
▶ Features and tasks (variable)	8
▶ Configuring Options	2
▶ Index (basic)	2
▶ Generating basic OLH (existing template)	3
▶ Total	22

12


© 2007 Rick Teplitz. All Rights Reserved.

# Estimating Projects

 **Estimating Project Time**  
Variable Factors


- ▶ Feature – 1-3 days per feature (task dependent)
  - Introduction and overview
  - Task
    - Configuring/customizing
    - Using
- ▶ A single feature may have multiple tasks
- ▶ Almost all products use some variation of this methodology

13  
© 2007 Rick Teplitz. All Rights Reserved.

 **Other Notes on Writing**

- ▶ Writing 1st draft represents about 70% of work
- ▶ Revisions take significantly less time


14  
© 2007 Rick Teplitz. All Rights Reserved.

 **Workflow – In house**  
User Manual and OLH - Medium Sized Application

How it Works at Shunra

- ▶ FRS is created – basis for new product / feature
- ▶ Use existing user manual template
- ▶ Write content while product being dev. using FRS
- ▶ Update content and screenshots as product develops
- ▶ Create index entries and internal references
- ▶ Provide to QA for review
- ▶ Make QA edits
- ▶ Convert to PDF
- ▶ Convert to online help

15  
© 2007 Rick Teplitz. All Rights Reserved.

 **Workflow – Freelance**  
User Manual and OLH - Medium Sized Application


- ▶ Review background material if available (e.g. FRS)
- ▶ Examine application
- ▶ Determine size and scope (index, OLH, diagrams)
- ▶ Create outline and get approval from client
- ▶ Create user manual template if required
- ▶ Write content
- ▶ Provide to client for review
- ▶ Make client requested edits (x2)
- ▶ Convert to PDF
- ▶ Convert to online help

16  
© 2007 Rick Teplitz. All Rights Reserved.

## Pricing Projects

 © 2007 Rick Teplitz. All rights reserved.

 **Contents**

- ▶ What is a Page?
- ▶ Pricing by Time
- ▶ Pricing by Page
- ▶ Pricing by Project
- ▶ Other Services
- ▶ Contractor Information
- ▶ Resources

18  
© 2007 Rick Teplitz. All Rights Reserved.

# Estimating Projects

**SHUNRA** What is a Page?

- ▶ Matter of preference
  - 1 Page
  - 250 words
  - 1,500 characters
- ▶ Font size and paragraph spacing have no impact on page estimation
- ▶ **Microsoft Word:** Tools/Word count\*
- ▶ **PowerPoint:** File/Properties/Statistics\* (not accurate)

\*Does not count words in graphics

19

© 2007 Rick Teplitz. All Rights Reserved.

**SHUNRA** Pricing by Time

- ▶ Track time throughout course of project
- ▶ Charge by the hour
- ▶ Hourly - range between \$25 - \$45
  - Estimate number of hours: 198
  - Determine hourly charge: \$35
  - Multiply hourly charge by estimated project time (e.g.  $198 \times \$35 = \$6,930$ )
  - Add VAT 15.5% ( $\$6,930 \times 1.155 = \$8,004$ )

20

© 2007 Rick Teplitz. All Rights Reserved.

**SHUNRA** Pricing by Page

- ▶ Determine your speed, e.g. 2 ½ hour per page
- ▶ Determine hourly rate, e.g. \$35 an hour
- ▶ Multiply speed by hourly rate:
  - $2 \frac{1}{2} \times \$35 \text{ an hour} = \$87.5 \text{ page}$
- ▶ 80 page document ( $80 \times \$87.5 = \$7,000$ )
- ▶ Add VAT 15.5% ( $\$7,000 \times 1.155 = \$8,085$ )

21

© 2007 Rick Teplitz. All Rights Reserved.

**SHUNRA** Pricing by Project

- ▶ Evaluate and categorize project size
  - **Small:** up to 200 hours
  - **Large:** above 200 hours
- ▶ Price small projects based on size
- ▶ Work on retainer basis for large projects if possible (more difficult to estimate – longer time)
- ▶ Use page or hourly calculation to determine approximate project cost

Become proficient and earn a higher rate!

22

© 2007 Rick Teplitz. All Rights Reserved.

**SHUNRA** How to Charge  
Translation

- ▶ Typically charged by page/word/character
- ▶ Word count is made from finished material, not source
- ▶ Work directly with client: 60 – 120 NIS per page
- ▶ Work through agency: approx. 30 NIS per page
- ▶ Special fields earn more. e.g., technical, medical, law, copy-translation
- ▶ Example – 20 page document with word count of 4500 words  $4500/250 = 18 \text{ pages} \times 90 \text{ NIS per page} = 1,620 + \text{VAT (15.5\%)} = 1,871 \text{ NIS}$

23

© 2007 Rick Teplitz. All Rights Reserved.

**SHUNRA** How to Charge  
Editing

- ▶ Never price before seeing material
- ▶ Determine level of editing required (beware of material written by non-native English speakers)
- ▶ 1 – 5 pages per hour
- ▶ Charge by hour, page or project
- ▶ If editing translated material, request source document
- ▶ Sometimes easier retranslating than editing translated material

24

© 2007 Rick Teplitz. All Rights Reserved.

# Estimating Projects

**SHUNRA** **How to Charge**  
Technical Services

- ▶ Creating flowcharts
- ▶ Formatting MSWord documents
- ▶ Editing images and adding callouts
- ▶ Layout for publishing
- ▶ Charts, graphs and Excel spreadsheets
- ▶ Working with HTML, updating websites

Do your homework, determine a worthwhile rate.  
See Histadrut rate table referenced at end of this presentation.

25

© 2007 Rick Teplitz. All Rights Reserved.

**SHUNRA** **How to Charge**  
Sample Rates

- ▶ **Translation:** NIS 90 per page for general text, more for specialized
- ▶ **Editing:** \$22 per hour (approx. 3 pages per hour)
- ▶ **Other Services:**
  - Layout for publishing: \$25 per hour
  - Charts, graphs and Excel spreadsheets: \$30 per hour

YOU CAN CHARGE MUCH MORE!

26

© 2007 Rick Teplitz. All Rights Reserved.

**SHUNRA** **Write it in the Contract**

- ▶ The price proposal is the contract
- ▶ Get a down payment if possible
- ▶ Don't begin working until you receive a signed copy of price proposal
- ▶ Clearly note in price proposal:
  - Cost + VAT
  - Payment guidelines: 30% down, shotef + 30 days
  - Job includes 2 sets of revisions, additional revisions involve charge based on hourly fee

27

© 2007 Rick Teplitz. All Rights Reserved.

**SHUNRA** **Your Options as a Contractor**

- ▶ **Tium Mas**
  - Don't need to register as a freelancer
  - Can be conducted 2 – 3 times a year
- ▶ **Osek Patur**
  - Enables you to work freelance up to 60 hours a month earning up to 60,000 NIS extra a year
  - Cannot deduct expenses
  - Don't pay VAT
- ▶ **Osek Morshe**
  - Registered entity
  - Can deduct expenses
  - Pay VAT - once you're in, tax authorities watch you like a hawk

Speak to an Accountant!

28

© 2007 Rick Teplitz. All Rights Reserved.

**SHUNRA** **How Much is My Work Worth?**

- ▶ **Whatever the client is willing to pay**
- ▶ New client – good rate to get the work
- ▶ Build a good working relationship
- ▶ Be competitive – you're not the only writer on the market
- ▶ Be outrageous at your own risk, or benefit

29

© 2007 Rick Teplitz. All Rights Reserved.

**SHUNRA** **Resources**

- ▶ **EnglishCommunicator:** <http://www.englishcommunicator.com>
- ▶ **Society for Technical Communications:** <http://www.stc-israel.org.il/>
- ▶ **Elephant.org:** writer's salary survey [www.elephant.org.il](http://www.elephant.org.il)
- ▶ **CJI Salary Survey:** <http://www.cji.co.il/docs.htm>
- ▶ **Histadrut Rate Table for Writing:** [http://groups.yahoo.com/group/CIWI/files/http://www.ita.org.il/download/pdf/transrate-eng\\_261106.pdf](http://groups.yahoo.com/group/CIWI/files/http://www.ita.org.il/download/pdf/transrate-eng_261106.pdf)
- ▶ **Israel Translation Association:** <http://www.ita.org.il/>
- ▶ **Yahoo! Groups in Israel.** Conduct a search for "rates" or other keywords in the relevant group. Useful Yahoo! groups include:
  - **Ciwi:** Independent Writers
  - **Techshore:** Technical Writers
  - **MarcomIsrael:** Marketing Writers
  - **Targum:** Translators

30

© 2007 Rick Teplitz. All Rights Reserved.