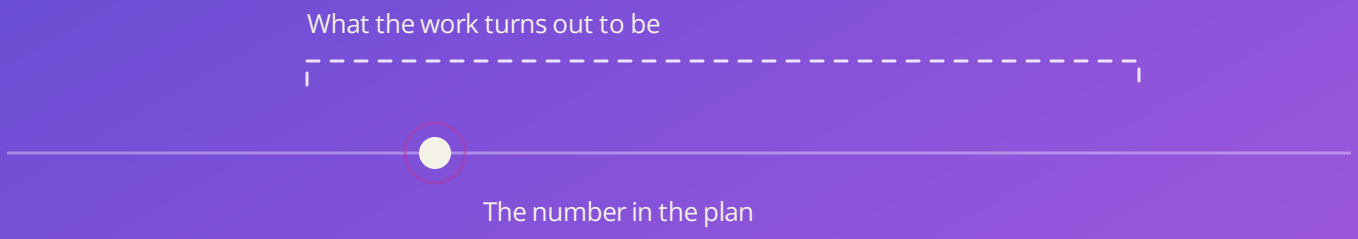
Hylaine

A HYLAINE PHASE ZERO™ GUIDE

The Untested Estimate

For technology leaders finalizing 2027 plans



Your 2027 plan likely runs on estimates nobody tested.

Every initiative in your 2027 plan has a number next to it. Someone produced that number weeks ago from a slide, a vendor quote, or last year's actuals, usually before anyone opened the codebase, pulled the data, or asked the people who will live with the result.

That isn't carelessness. It's how planning works. Budgets close on a calendar, and discovery happens after the money moves. The problem is that the estimate gets treated as a finding when it's really a hypothesis.

In regulated industries the gap costs more. An untested estimate carries compliance and audit exposure along with budget risk.

45%
average budget overrun

7%
over schedule

56%
less value than predicted

Average results for large IT projects (initial budget above $15M) in a McKinsey and University of Oxford study of 5,400+ IT projects, 2012. Industry context, not a Hylaine outcome.

This guide covers 3 things: 5 blind spots an untested estimate can't see, how the Hylaine Phase Zero™ framework finds them, and a scorecard you can run on your own 2027 line items this week.

5 things your estimate doesn't know

The same blind spots show up across Hylaine Phase Zero engagements. None of them is exotic. All of them are invisible from a planning spreadsheet.

WHY THEY STAY HIDDEN

The people who feel a system's pain every day are rarely the people who hold the budget to fix it. Brian Justice, Hylaine's Director of Technical Delivery, made that point on Off the Deck. By the time a problem reaches the person who can pay for it, it has been summarized into a slide, and the slide is what gets estimated. **Listen: If Not Now, When? on Off the Deck**

01 The data isn't what the system says.

IN THE BUDGET A line that assumes clean, complete source data because the documentation says so.

WHAT PHASE ZERO FOUND An engineering firm's ERP marked 89% of projects complete. When the Phase Zero team matched records across the 2 systems that mattered, only 78% of project IDs lined up.

THE QUESTION THAT CATCHES IT

Has anyone pulled a sample of the actual data, or only read the documentation?

02 The system is sicker than the status report.

IN THE BUDGET An enhancement line on a platform everyone assumes is stable enough to build on. You know what they say about assuming.

WHAT PHASE ZERO FOUND A 4-week Phase Zero on a business services firm's data environment found no archiving strategy and no retention policy. Storage was on track to run out within the next quarter.

THE QUESTION THAT CATCHES IT

What do the last 90 days of incidents, failures, and support tickets say?

03 Nobody agreed on the question.

IN THE BUDGET A broad portfolio line, such as "modernize the acquired applications."

WHAT PHASE ZERO FOUND An insurance organization asked Hylaine to price re-platforming a portfolio of applications inherited through acquisitions, none of them ever vetted for use or ROI. The interviews surfaced the real priority: 1 application leadership had already targeted. The team redirected and delivered a detailed plan for it in under a week. The portfolio estimate would have answered a question nobody was asking.

THE QUESTION THAT CATCHES IT

Would every decision-maker on this initiative write down the same 3 questions it must answer?

04 The plan assumes people are ready.

IN THE BUDGET Build costs with no line for adoption, readiness, or the capacity of the teams who have to change.

WHAT PHASE ZERO FOUND Across 60+ interviews and field observations, a Phase Zero at a large consumer products company found business leaders had lost confidence in IT. The findings shaped the IT reorganization and a new enterprise architecture function.

THE QUESTION THAT CATCHES IT

Who has to work differently when this goes live, and has anyone asked them?

05 The estimate is a single number.

IN THE BUDGET 1 cost, 1 date, and no statement of what has to be true for either to hold.

WHAT PHASE ZERO FOUND A 6-week Phase Zero asked whether an HR platform migration was worth doing at all. It returned a decision-ready recommendation, a phased roadmap, and a cost, effort, and benefit workbook leadership could challenge line by line.

THE QUESTION THAT CATCHES IT

What range sits around this number, and which assumption moves it most?

THE HYLAINE PHASE ZERO™ FRAMEWORK

Test the estimate before you fund it.

Hylaine Phase Zero is the framework Hylaine uses to turn an idea with a number attached into a scope a team can execute. It runs 2 to 12 weeks, it's fixed in scope, and it ends in a plan, not a report.

START WITH THE QUESTIONS

Every Phase Zero opens by writing down, in priority order, the questions the plan must answer.

- Is this worth doing?
- What does it really cost?
- What has to be true first?
- Who has to change?

1 **Investigate** Reality, not assumptions.

Interviews across executives, business teams, subject matter experts, and technologists, including the people who live with the system every day, not just the ones who fund it. A Standard engagement typically includes 8 to 15 interviews; the largest have run past 60. Systems, data, and documentation reviewed firsthand. Assumptions flagged for proof.

2 **Analyze** Validated themes, not anecdotes.

Risks classified by severity and probability. Readiness signals captured. Weekly checkpoints, so nothing surprises anyone later.

3 **Solution** Realistic paths forward.

Viable options compared on trade-offs, risk, and effort, then pressure-tested against your constraints.

4 **Plan** Execution made possible.

A phased roadmap tied to business value, estimate ranges with confidence bands, at least 2 timeline options, named dependencies, and decision gates.

A plan a team can execute

Engagement Solution Plan

Vision, findings, current and future state, recommendations, risk matrix, roadmap, estimates, and what's out of scope. Written so a team that was never in the room can pick it up and execute it, with Hylaine or anyone else.

Executive Readout

A decision narrative for leadership, previewed with your sponsor a week early, so the final readout confirms decisions instead of springing them.

Change readiness assessment

Readiness findings, adoption risks, and a 30-60-90 day plan for the people side of the work.

Implementation-ready roadmap

Phases, milestones, resources, and dependencies, with at least 2 timeline options to choose between.

Readiness is part of every engagement. Every Phase Zero assesses people alongside technology: sponsorship, impact, and adoption risk, scaled to the size of the engagement.

3 sizes, 1 engine

Sprint

2 to 4 weeks

A known problem with a narrow scope, or a single decision in flight.

MOST COMMON

Standard

4 to 8 weeks

Alignment across business, technical, and executive teams.

Extended

8 to 12 weeks

Multi-domain initiatives that need strategic depth, a full business case, or proof of value.

You can't share risk you haven't measured.

Phase Zero isn't something Hylaine sells before the real work. It's how Hylaine begins the real work.

Hylaine is building toward engagements that are measured on outcomes, with risk carried on both sides. That's the right direction for technology leaders who are tired of paying for hours. But no one can responsibly put skin in the game on a scope nobody has tested.

Shared risk needs a shared baseline, agreed before the build starts:

- Agreed questions
- Validated facts
- Named risks
- Signed success measures

Phase Zero produces that baseline. It turns “we think this costs about X” into “here's what we're committing to, what it depends on, and how we'll both know it worked.”

Phase Zero is the difference between a guess and a commitment.

What Phase Zero found

3 engagements, anonymized. Each started with a reasonable estimate. Each changed once someone looked.

A compensation platform nobody trusted

56% of pipeline runs failing, found in the vendor's own status emails

ASKED

A financial advisory firm's commission engine failed often, ran 12+ hours, and cost more than $300,000 a year to support. Leadership needed to know whether to fix it or replace it.

FOUND

Nobody had a full view of the architecture, so the team documented it for the first time. A custom tool then read hundreds of vendor status emails and showed 56% of pipeline runs were failing, with the rate climbing.

CHANGED

1 big replacement bet became a 2-part plan: stabilize now with targeted database and integration tuning, then replace. Each of 3 long-term architecture options came with its own ROI analysis.

An invoicing engine behind a $40B book

8x faster, delivered on time and within budget

ASKED

An insurance platform invoiced millions of member lives through legacy stored procedures that needed weekend oversight. A failure could lock databases shared with the policy system behind $40B+ in annual premiums.

FOUND

Phase Zero produced timeline and cost estimates, high- and low-level designs, and a rollout strategy, with an architecture the client's engineers could build alongside Hylaine.

CHANGED

The new engine shipped on time and within budget, ran 8x faster than the legacy system, and ended the need to schedule invoicing around low-demand windows.

The 78% that reshaped an archive plan

5.15 TB archived in 36 hours, zero data loss

ASKED

An engineering firm's project files were growing about 30% a year, and inactive projects were filling high-cost storage. The plan: archive completed work automatically.

FOUND

The 78% match from blind spot 01. Phase Zero reconciled ERP and file-system records, set a retention policy, and built the business case, with potential ROI of up to $1.7M over 3 years.*

CHANGED

The follow-on build archived 5.15 TB of closed project data in its first 36 hours with zero data loss.

*Projected in the Phase Zero business case. Not a realized result.

WHAT THE 3 HAVE IN COMMON

The first number was reasonable.

Each estimate came from capable people working with the information they had.

The facts were already there.

In status emails, file systems, and conversations nobody had time to have.

Looking cost less than not looking.

Each Phase Zero was fixed in scope and measured in weeks. What it found reshaped plans worth far more.

The question isn't whether your 2027 estimates are wrong. It's which ones, and by how much.

The 2027 Line-Item Scorecard

Run this on every major initiative in your 2027 plan. Score each dimension 0, 1, or 2, then add them up. Better yet, have 2 people score separately and compare. A big spread is a signal to talk, not to average.

DIMENSION	0 Untested	1 Partly tested	2 Tested
Question	Described as an activity ("modernize X")	A goal exists, but decision-makers describe it differently	A prioritized list of questions every decision-maker agrees on
Ground truth	Rests on documentation and memory	Someone has looked at the systems, not the data	Systems, data, and recent incidents examined firsthand
Ownership	No owner with authority to make trade-offs	An owner, but decisions escalate by committee	A named sponsor with budget authority and a clear escalation path
Readiness	Nobody has asked the teams who have to change	Impacted teams known, capacity and adoption unplanned	Impacted groups, capacity, and adoption are in the scope
Estimate shape	A single number	A range, without the assumptions behind it	A range with named assumptions, dependencies, and 2+ timeline options

SCORE 8 TO 10

Fund it.

The estimate has been tested. Build, and hold it to its assumptions.

SCORE 5 TO 7

Test it first.

Fund a Phase Zero before the full line. Weeks now beat quarters later.

SCORE 0 TO 4

Hold it.

This is an idea with a number attached. Answer the questions before you ask for money.

Score your 2027 line items

List your largest initiatives, score each dimension from the previous page, and make the call. Print it, or bring it to your next planning review.

Initiative	Q	G	O	R	E	Total	Call
							Fund / Test / Hold
							Fund / Test / Hold
							Fund / Test / Hold
							Fund / Test / Hold
							Fund / Test / Hold
							Fund / Test / Hold
							Fund / Test / Hold
							Fund / Test / Hold

Q Question **G** Ground truth **O** Ownership **R** Readiness **E** Estimate shape

Low scores aren't failures. They're the most useful thing a planning cycle can produce: a list of what you don't know yet, found while it's still cheap.

Pressure-test 1 of your 2027 bets.

Pick the initiative with the biggest number, the thinnest scope, or the most history. Bring your scorecard. In a discovery call with the Hylaine team, you'll walk through it together: where the estimate holds, where it's exposed, and what it would take to test it before the budget locks.

Book a discovery call → hylaine.com/contact-us

Ben Cole

Hylaine Phase Zero Architect

Ben Cole owns the Hylaine Phase Zero framework: how it's defined, how it's delivered, and how it improves after every engagement. He shapes the standards and templates each engagement works from, from the questions it opens with to the roadmap it hands off. Ben works across Hylaine's practices with technology leaders weighing modernization, integration, and enterprise strategy decisions, and he makes sure every Phase Zero ends in a plan a team can actually execute.

ABOUT HYLAINE

Hylaine is a values-first technology consulting firm serving Fortune 1000 and high-growth enterprises in regulated, data-intensive industries. Advisory, Data Intelligence, Application Development, and Delivery Services, from experienced consultants who stay with the work.

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