No Estimates: Appeal, Rationale, and Shortfall

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The No Estimates movement did not arise because people suddenly lost interest in planning. It arose because, in many software organizations, estimation had become a ritual that produced false precision and weak decisions. Teams were pressed to provide detailed numbers long before the work was understood, and those numbers were then treated as commitments rather than provisional judgments. In that setting, the movement's critique had force. It challenged a widespread management failure: the use of numbers that looked rigorous but did not reflect actual knowledge.

At the same time, the movement's shortfall began when a valid criticism of poor estimating was turned into a broader rejection of estimation itself. Organizations still needed a basis for comparing alternatives, allocating resources, sequencing work, setting expectations, and making investment decisions before sufficient execution data existed. The issue, therefore, was not whether uncertainty existed. It was how to reason about it.

1. Why No Estimates Had Appeal

The rationale behind No Estimates was easy to understand. Traditional software estimates were often made too early, with too little information, and under organizational pressure to appear definitive. In complex work, especially when it involved innovation, evolving requirements, or unfamiliar technology, the uncertainty was not incidental. It was the defining feature of the situation.

A single estimate such as "four weeks," "five story points," or "delivery in Q3" concealed that uncertainty rather than representing it. It suggested a level of understanding that often did not exist. When reality diverged from the number, the usual pattern followed: pressure increased, corners were cut, morale declined, and leaders lost trust in estimates. The problem was often not the people. It was the form of the estimate itself.

No Estimates also offered a legitimate operational insight. Small increments of delivered work, observed throughput, cycle time, and actual completion data were often more informative than speculative forecasts made far in advance. The movement gained influence because it challenged practices widely perceived as wasteful, misleading, and, in some cases, performative.

2. What the Movement Got Right

The movement was strongest as a critique of bad estimating practice. It was right to challenge the misuse of story points as contractual commitments. It was right to criticize detailed estimates whose apparent rigor exceeded the evidence behind them. It was right to object when leaders confused a planning assumption with a promise.

It was also right to insist that actual evidence mattered more than speculative confidence. Once delivery began, observed performance should influence judgments about likely completion dates, costs, and risks. In that respect, No Estimates served as a corrective. It reminded organizations that

what had actually been learned through execution was more valuable than confidence projected at the start.

3. Where No Estimates Fell Short

Its shortfall began when a valid criticism of traditional estimating was turned into a broader rejection of estimation itself. Before execution data existed, organizations still had to compare alternatives, decide whether to fund a project, choose sequencing, and set initial expectations. Those decisions required forward-looking judgment under uncertainty. Refusing to estimate did not remove that need.

The empirical measures favored by No Estimates did not replace estimation. They informed it. Throughput, cycle time, and observed completion performance were not alternatives to probabilistic judgment. They were evidence that should refine it. Saying "we will use actual data" did not eliminate estimation; it changed the basis on which estimates were formed and revised.

There was another limitation. No Estimates was most plausible when the work was relatively decomposable, the team was stable, and the near future resembled the recent past closely enough that historical flow data was informative. That was not always the case. Novel projects, major architectural changes, new domains, and unusually coupled work all involved uncertainties that were not well captured by simple extrapolation from recent throughput.

4. A Better Framing

The better alternative is not a return to false precision, nor is it the abandonment of estimates. It is to acknowledge uncertainty, embrace it as inherent in innovative work, and manage it explicitly. That requires more than replacing one set of rituals with another. It requires a different intellectual stance: uncertainty is not an embarrassment to be hidden but the central condition that planning and control must address.

Once that point is accepted, the natural next step is to apply probability. Initial judgments about time, cost, scope, and benefits should be represented as probability distributions rather than point claims. As work proceeds, observed performance data should be used to revise those judgments systematically. In that sense, the right response to the defects of conventional estimating is not less analysis but better analysis.

This is where Bayesian methods matter. Bayes is not merely a theorem to be cited. It is part of an applied probability framework for learning under uncertainty. It provides a disciplined way to begin with prior judgments, treat new information as evidence, and update beliefs about likely duration, cost, delivery date, and outcomes. The point is not to generate spurious mathematical elegance. It is to reason explicitly about what is not yet known and to improve that reasoning as evidence accumulates.

That framing preserved the No Estimates critique's strongest points while avoiding its central weakness. It accepted that uncertainty was real, that early point estimates were often misleading, and that observed delivery data mattered. But it also recognized that leaders still had to make decisions before enough data existed and had to continue revising those judgments as the work

unfolded. The best approach, therefore, was neither denial nor abdication. It was to acknowledge, embrace, and manage uncertainty.

5. The Leader's Perspective

For leaders, the issue is not whether a team can avoid the language of estimates. It is whether the organization can make sound decisions in the face of uncertainty. Investment decisions, staffing choices, sequencing decisions, release planning, and portfolio tradeoffs all require some view of the future, however uncertain that view may be. The practical question is what form that view should take.

A single-point estimate is usually too brittle because it suppresses the range of possible outcomes. A refusal to estimate is also insufficient because it leaves leaders without an explicit basis for comparing alternatives or understanding exposure. What leaders actually need is a disciplined representation of uncertainty: the probabilities of different completion dates, the probability distribution of cost to complete, the likelihood of achieving the intended benefits, and a view of which uncertainties are most consequential to the next decision.

That is why probabilistic reasoning is not a technical embellishment. It is the basis of responsible management when outcomes are uncertain. If the central management problem is uncertainty, then the central analytic tool must be probability. Bayesian methods are especially useful because they support learning over time. They allow early judgments to be expressed honestly, and then refined as throughput, completion times, defect patterns, rework, cost experience, and other evidence accumulate.

This also changes the meaning of control. Control is no longer the enforcement of a fixed early estimate. It is the ongoing adjustment of decisions as uncertainty is reduced or exposed. Leaders can ask better questions: Under what conditions should we continue investing? What evidence would justify a pivot? Which uncertainties are worth reducing now? When should scope be reduced, more discovery funded, or the effort halted altogether? Those are the real management questions, and they are better served by probabilistic judgment than by either false precision or anti-estimation rhetoric.

The practical bottom line for leadership is straightforward. Uncertainty must be acknowledged, embraced, and managed. That means using probability to represent what is not yet known, using Bayesian methods to revise judgment as evidence arrives, and using those evolving judgments to support better decisions. Leaders do not need certainty. They need a more honest and more useful way to act under uncertainty.

6. Bottom Line

The influence of No Estimates stemmed from its exposure of a real failure mode in software management: the use of numbers that looked rigorous but did not reflect actual knowledge. Its critique remained important for that reason.

Its shortfall was that organizations did not need less reasoning about uncertain futures. They needed better reasoning. The sound response was to acknowledge uncertainty, embrace it as inherent in innovative work, and manage it explicitly. That meant fewer ritualized commitments,

more explicit treatment of uncertainty, and a disciplined use of probability, especially Bayesian methods, to revise judgment over time.