Driving Effective Product Portfolio Gate Meetings: Five Essentials from CPG Leaders

by Cameron Beattie and Kasey Durbin

Your company has just developed a new phase gate process, but will you be able to adhere to the process and enable successful gate meetings? Nearly 70% of companies claim they have a well-developed and adopted phase gate process, but it is not always executed as intended, primarily due to gate meetings themselves. An inability to manage gate meetings correctly lowers the effectiveness of the overall project portfolio and process.

Smuckers and Land O’ Lakes are two innovation leaders who are currently undertaking multi-year innovation transformation journeys. These companies have realized the value of effective gate meetings to maximizing their full potential.

Here are some of their essentials for effective gate meetings:

Include the Decision Makers.
What use is a gate meeting if it cannot result in a decision? Include the “gate keepers” - the leadership that is responsible for making decisions. This team should be cross-functional and involved at every stage. Don’t wait to incorporate key people until after it is too late!

Establish Criteria in Advance.
In order to enable decision making, a gate meeting needs to have set criteria. This criteria may differentiate from gate to gate. In order to establish the correct criteria, it must be defined in advance with cross functional buy-in from the highest levels in the organization. This ensures a robust set of criteria and quells any need to deviate from the defined process. Criteria can remain the same across business units and products.

Enable Cross Functional Collaboration.
One of the goals of a phase gate process is to break down walls and enable cross functional collaboration. The same goes for gate meetings; enabling this allows for better decision-making and eliminates surprises down the line.

Enforce Simple Discipline.
Discipline in all areas is required to ensure that your phase gate process is successful. At gate meetings, this includes having a defined leader to guide decisions in relation to the defined criteria. Keep discipline simple, as it is likely to change, and remember lack of discipline causes most innovation to fail.

Establish Ground Rules.
Gate meetings need specific formats and rules. Establish a pre-determined agenda that each project team needs to follow, including outlined information to make a gate decisions and time allotted to present.

These insights from Smuckers and Land O’ Lakes were captured in a webcast which is now available for archived viewing. Click Here to View

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