P&PM Dispatch: Who Should and Who Should NOT Attend Gate Meetings

by Reinier Stomp and Tiffany Le Brun

When a new phase gate process is designed and implemented, it can be tricky to adapt to the new way of working. One of the biggest challenges: organizing effective gate meetings that move beyond project reviews to enable real time decision-making. How can you do it? Involve the right people in the right gate meetings.

In its most simplistic form, the sole purpose of a gate meeting is to decide the fate of all projects, ultimately deciding between which projects should be ‘killed’ or granted the resources needed to ensure success. So why is it that projects are so rarely cancelled, and instead are pushed forward without the appropriate resource allocation? Many times, it’s because the wrong people are in the room.

The project team, naturally biased towards their project, should not be tasked with making a gate decision and should rarely participate in gate meetings. So who should?

There are two main decisions made in gate meetings:

1. Stop the project and free-up resources for other projects
2. Continue the project and associated investments

These decisions require gatekeepers who:

1. Have the knowledge to assess the quality of the work done in the previous phase and the ongoing potential of the project
2. Have the authority necessary to stop projects and/or allocate resources for the next phases of ongoing projects

Not all projects are the same; different project types will require gatekeepers from different levels and functions of the organization. Even though there is no optimal number of participants for gate meetings, too many participants can negatively impact the effectiveness of the decision making during the meeting.

There are many success factors critical to conducting effective gate meetings, but having the right people at the table is an important first step.

In the future we will cover other critical success factors, including how to set clear definitions of decision criteria, and how to link these meetings with portfolio meetings.

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