Project Development Stages

PREFEASIBILITY STUDY	FEASIBILITY STUDY	DESIGN APPROVALS	CONSTRUCTION	PRE-OPERATION
Stage 1	Stage 2	Stage 3, Stage 4, Stage 5 and Stage 6	Stage 7	Stage 8

OUTPUT   OUTPUT   OUTPUT   OUTPUT   OUTPUT

REQUESTED GATE REVI[EW]

STAGE 1 [GAT]E INPUT
[Due] when [request]ed before [... th]e stage

STAGE 2 GATE INPUT
Due when requested before end of the stage
2

STAGE 3 GATE INPUT
Due when requested before end of the stage
3

STAGE 4 GATE INPUT
Due when requested before end of the stage
4

STAGE 5 GATE INPUT
Due when requested before end of the stage
5

STAGE 6 GATE INPUT
Due when requested before end of the stage
6

STAGE 7 GATE INP[UT]
Due when requested befo[re] end of the sta[ge]

A Guide To Gate Review Scheduling Models

Adding Value Methodology

PROJECT START

Gate 1 — Gate 1 Input
Gate2 — Gate 2 Input
Gate 3 — Gate 3 Input
Gate 4 — Gate 4 Input
Gate 5 — Gate 5 Input
Gate 6 — Gate 6 Input
Gate 7 — Gate 7 Input
Gate8 — Gate 8 Input
Gate 9 — Gate 9 Input
Gate [1...] — Gate 1[...]

Start | JAN | FEB | MAR | APR | MAY | JUN | JUL | AUG | SEP | OCT

Q1   Q2   Q3   Q4

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Content   Page

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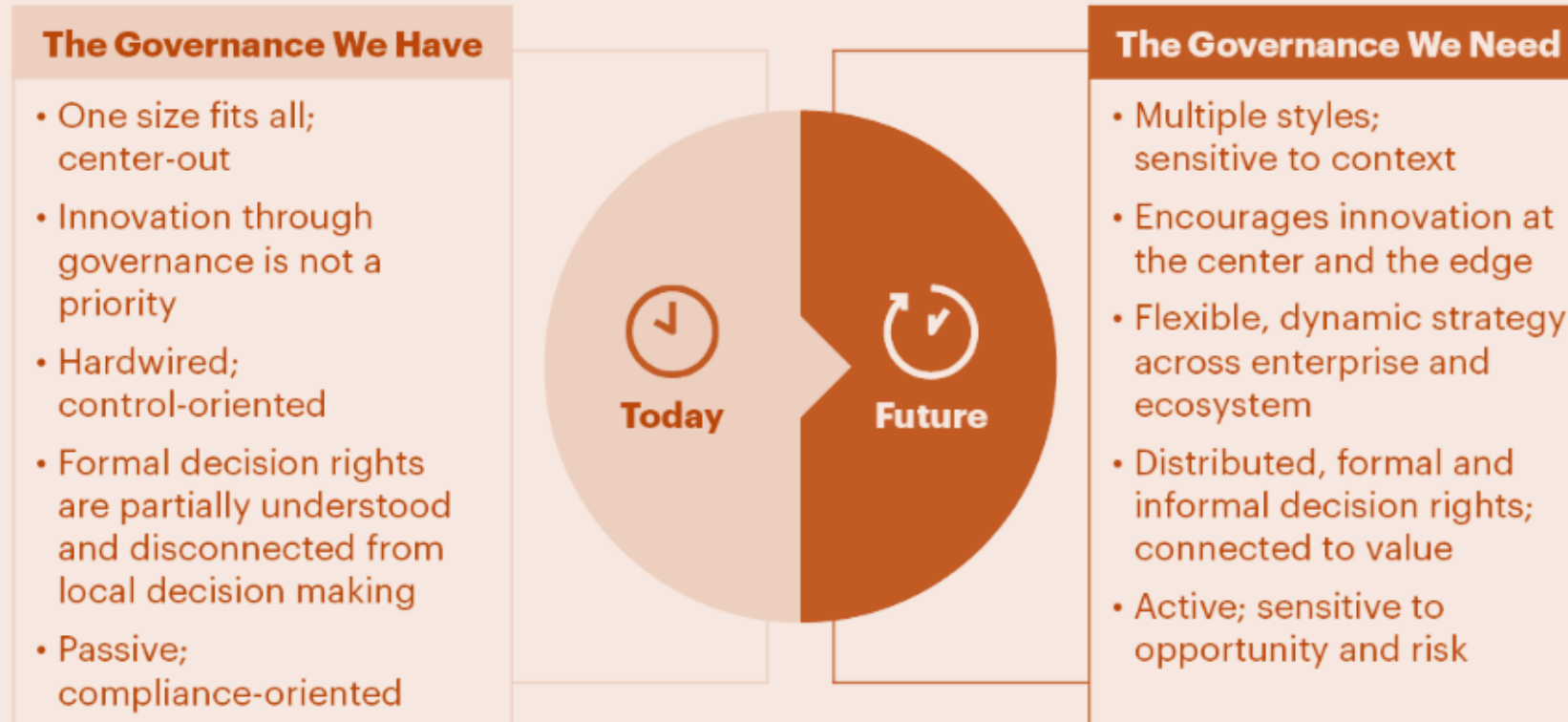EPPM
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Projects' Governance

" The governance system works alongside the value delivery system to enable smooth workflows, manage issues, and support decision making "

PMBOK 7th edition

" PMI 2015 research indicated that poor decisions because of ineffective communications is the first factor for projects failure with 56% of the studied cases "

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Figure 1. One-Size-Fits-All Model Is No Longer Enough

Data and Analytics Governance Limitations: One-Size-Fits-All Model Is No Longer Enough

The Governance We Have

- One size fits all; center-out
- Innovation through governance is not a priority
- Hardwired; control-oriented
- Formal decision rights are partially understood and disconnected from local decision making
- Passive; compliance-oriented

Today → **Future**

The Governance We Need

- Multiple styles; sensitive to context
- Encourages innovation at the center and the edge
- Flexible, dynamic strategy across enterprise and ecosystem
- Distributed, formal and informal decision rights; connected to value
- Active; sensitive to opportunity and risk

Source: Gartner
761782_C

By 2027, 80% of data and analytics (D&A) governance initiatives will fail if it will not enable prioritizing business outcomes

Gartner

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"The Gateway Review **Process** is a project technical and financial review methodology developed in the United Kingdom to **improve** the delivery of critical and important projects. It involves short, sharp and confidential reviews conducted **by stakeholders and reviewers** who are **not involved directly** in the project management lifecycle."

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Governance Culture

What Gate Review Governance Do You Apply?

What Gate Review Process Do You Follow?

When Do You Have Gate Review?

How Do You Plan Your Gate Review Dates?

What is Your Governance on Rescheduling Cancelled Gate Review?

**How Much Effort and Time Do You Have to Do to Prepare for A Gate Review?**

What DOA Do You Have?

Gate reviews is a form of **communication** which is a crucial part of project governance, especially for **large** and **complex** projects.

Some governance designs the Gate Review to be planned for **every month or quarters or (both)** and some designs it to **be requested by the end of each stage**. The later might (or might not) have ad hoc requested gate review when needed which is considered as a third Gate Review governance model. This add a degree of **complexity** to **project scheduling** to identify the **critical milestones**

Governance Based On Project Development Stages
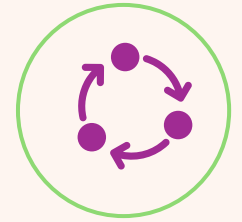
PREFEASIBILITY STUDY

Stage 1

OUTPUT

FEASIBILITY STUDY

Stage 2

OUTPUT

DESIGN APPROVALS

Stage 3, Stage 4, Stage 5 and Stage 6

OUTPUT

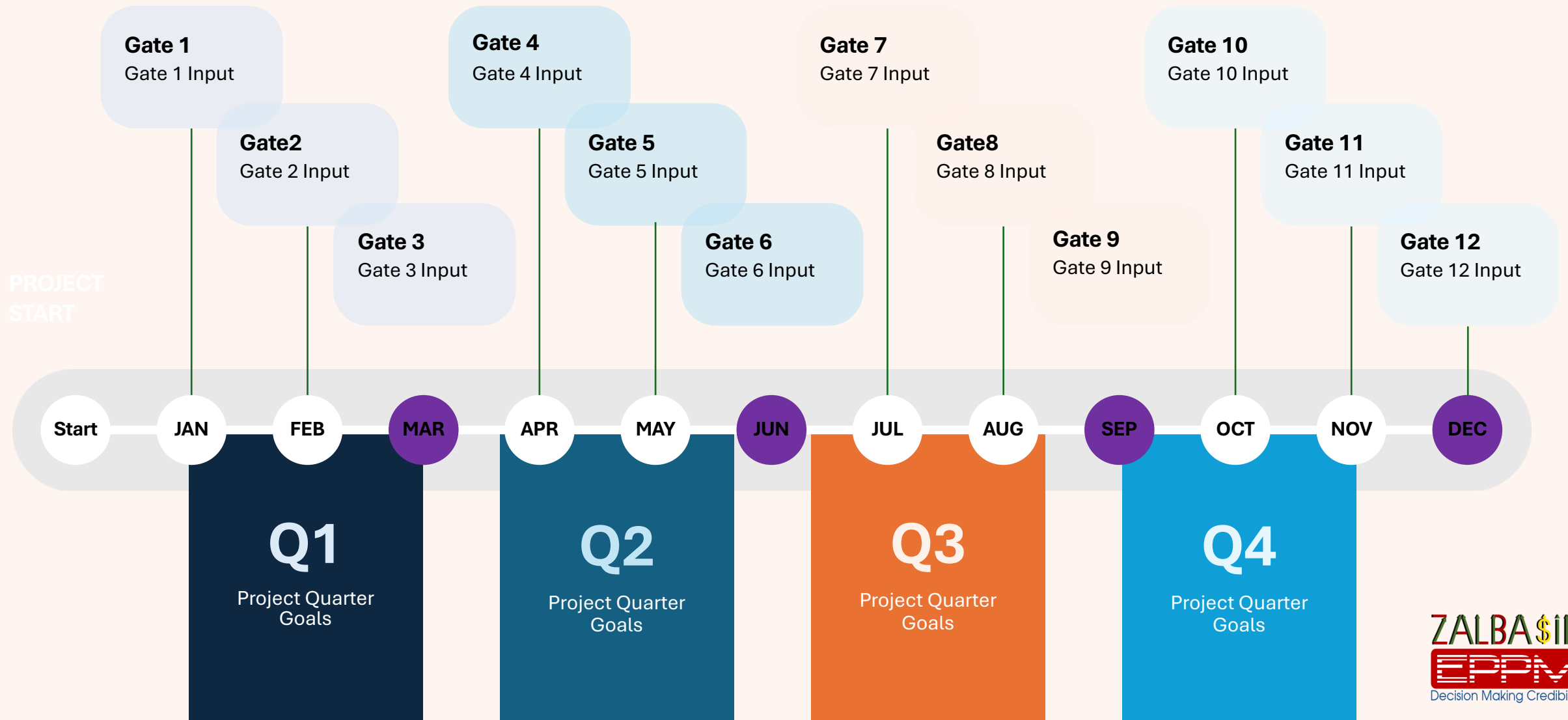## CONSTRUCTION

Stage 7

OUTPUT
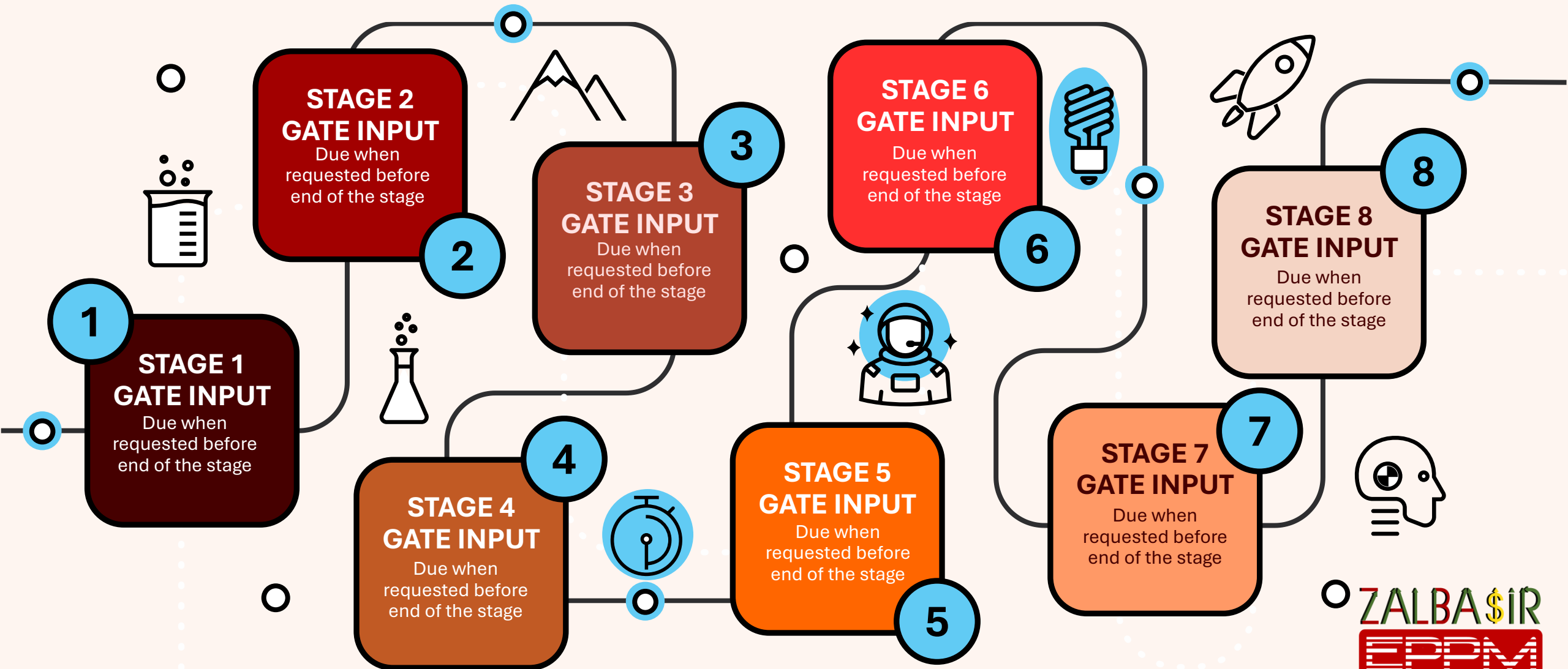
PRE-OPERATION

Stage 8

OUTPUT

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Governance Based On Monthly and Quarterly Reviews

Gate 1
Gate 1 Input

Gate2
Gate 2 Input

Gate 3
Gate 3 Input

Gate 4
Gate 4 Input

Gate 5
Gate 5 Input

Gate 6
Gate 6 Input

Gate 7
Gate 7 Input

Gate8
Gate 8 Input

Gate 9
Gate 9 Input

Gate 10
Gate 10 Input

Gate 11
Gate 11 Input

Gate 12
Gate 12 Input

PROJECT START

Start JAN FEB MAR APR MAY JUN JUL AUG SEP OCT NOV DEC

Q1
Project Quarter Goals

Q2
Project Quarter Goals

Q3
Project Quarter Goals

Q4
Project Quarter Goals

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REQUESTED GATE REVIEW

STAGE 1 GATE INPUT
Due when requested before end of the stage

1

STAGE 2 GATE INPUT
Due when requested before end of the stage

2

STAGE 3 GATE INPUT
Due when requested before end of the stage

3

STAGE 4 GATE INPUT
Due when requested before end of the stage

4

STAGE 5 GATE INPUT
Due when requested before end of the stage

5

STAGE 6 GATE INPUT
Due when requested before end of the stage

6

STAGE 7 GATE INPUT
Due when requested before end of the stage

7

STAGE 8 GATE INPUT
Due when requested before end of the stage

8

The Communication in Waterfall

Waterfall, known for its structured, sequential approach, emphasizes clear and documented communication. Here's how communication governance manifests in Waterfall projects:

Formal Communication Plans: Detailed communication plans outline roles, responsibilities, channels, and frequency of communication for each project stage.

Status Reports and Meeting Minutes: Regular status reports and documented meeting minutes ensure information continuity and keep stakeholders informed.

Stage-Gate Decision Points: Communication protocols are established around stage gates (decision points) in the project lifecycle. This ensures stakeholders receive clear information to contribute to informed decisions before project phases progress.

Change Management Communication: A defined communication strategy for change management is crucial. Stakeholders need to be informed about change requests, their impact, and approval processes.

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The Communication Waterfall

Benefits:

- Clear expectations for communication throughout the project lifecycle.

- Well-defined documentation for governance, future reference and knowledge sharing.

- Structured approach reduces ambiguity and fosters informed decision-making.

Challenges:

- Can be inflexible in demanding environments where rapid adjustments are necessary.

- Extensive documentation can be time-consuming to create and maintain.
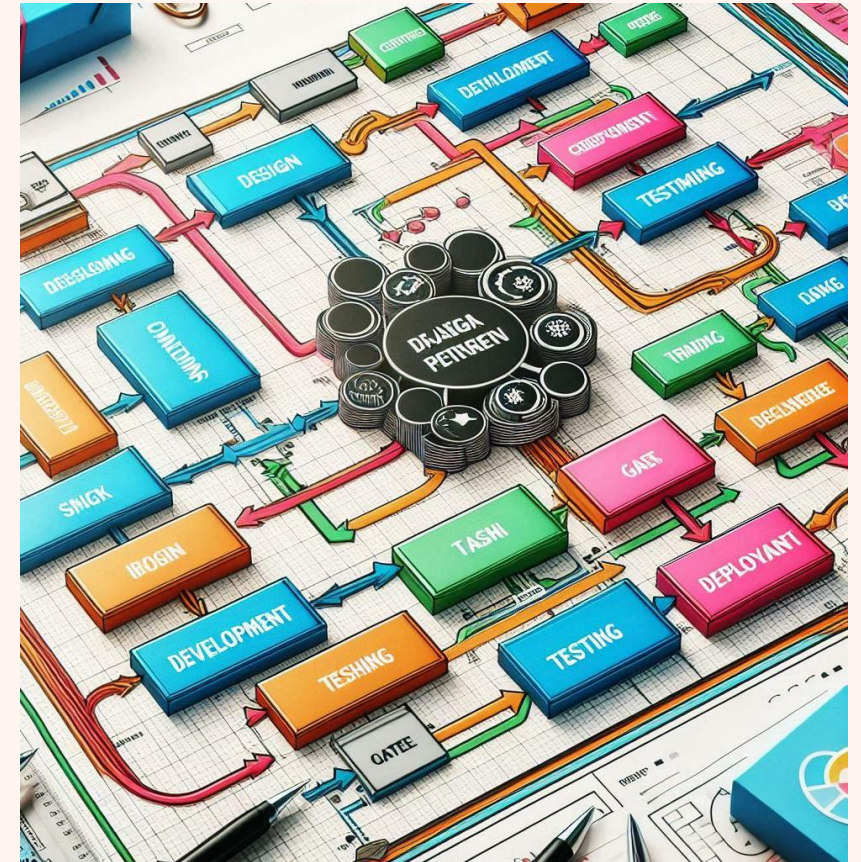
The Communication in the **PRINCE2**

PRINCE2, a structured project management methodology, emphasizes pre-defined communication plans and clear roles and responsibilities for communication throughout the project lifecycle. Here's how communication governance functions in PRINCE2 projects:

Pre-defined Communication Plans:

These plans outline the communication strategy for each project stage (initiation, planning, execution). They define communication channels, roles, frequency of communication, and reporting protocols.

Communication Roles and Responsibilities:

Roles like Project Manager, Project Assurance, and Team Leads have clear communication responsibilities outlined in the plan. This ensures everyone understands who to communicate with for specific information.

Formal Reporting and Documentation:

PRINCE2 emphasizes formal reporting through documents like progress reports, risk logs, and issue registers. These documents ensure clear communication of project status and potential roadblocks.

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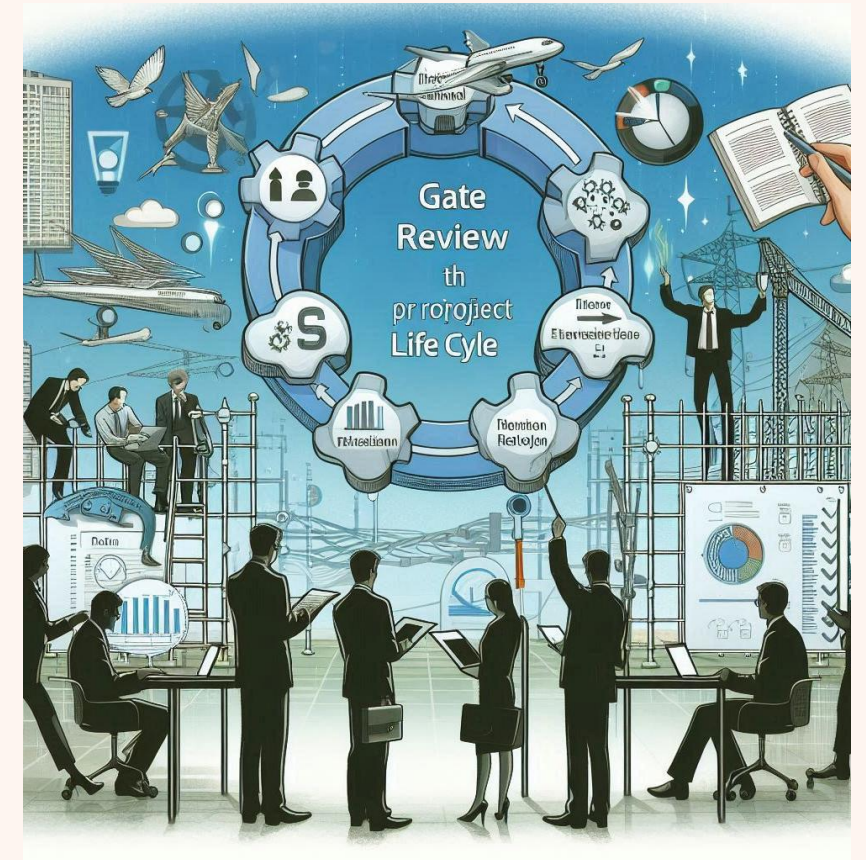
The Communication in the PRINCE2

Benefits:

- Ensures a structured and controlled communication approach throughout the project.

- Clearly defined roles and responsibilities minimize confusion and information gaps.

- Formal reporting provides a documented record of project communication and progress.

Challenges:

- Can be perceived as rigid and inflexible in fast-paced environments.

- Extensive documentation might require significant time and resources to create and maintain.

The Communication in the Agile

Agile Approach, known for iterative development and continuous feedback, prioritize real-time communication and collaboration. Here's how communication governance functions in Agile projects.

Focus on Collaboration:

Communication fosters collaboration within the project team. Daily stand-up meetings, sprint planning sessions, and retrospective meetings are key communication touchpoints.

Collaborative Tools:

Project management software with features like Kanban boards, chat functionalities, and document sharing capabilities facilitate real-time communication and information exchange.

Concise and Actionable Communication:

Communication emphasizes brevity and clarity to keep team discussions focused and ensure everyone is on the same page.

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The Communication in the Agile

Benefits:

- Fosters a culture of open communication and collaboration within the team.

- Enables rapid information exchange to support quick decision-making and adaptation.

- Reduces the need for extensive documentation.

Challenges:

- May not be suitable for projects with complex stakeholder needs or geographically dispersed teams.

- Requires a high level of team discipline and self-organization for effective communication.

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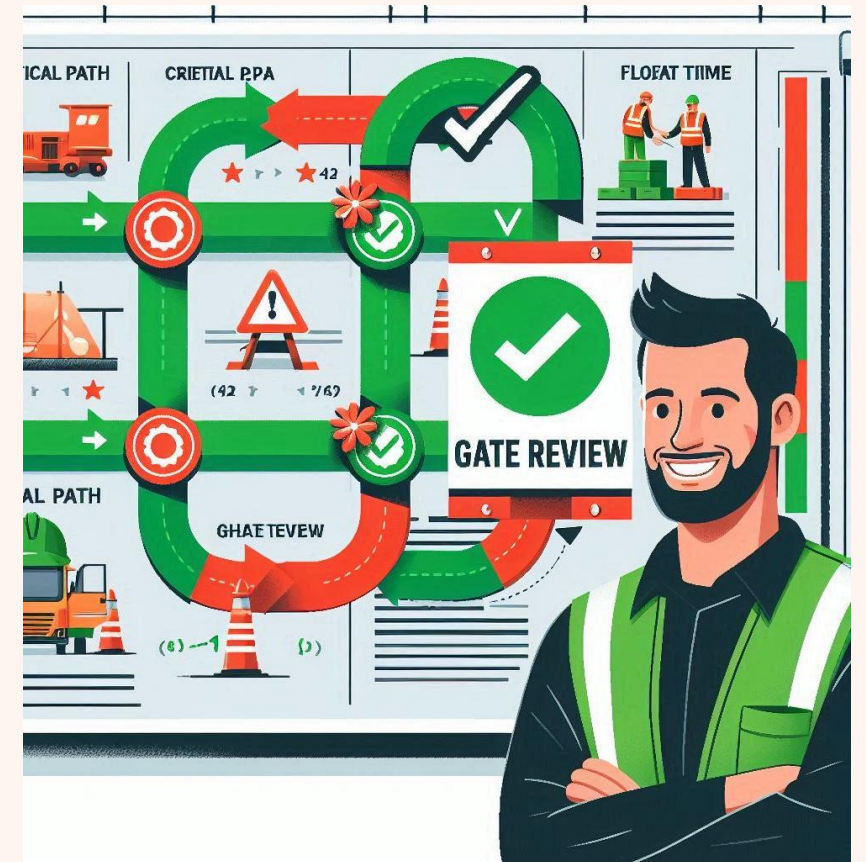
The Communication in the Lean

Lean methodology emphasizes continuous improvement and waste elimination. Communication governance in Lean projects centres around:

Open and Transparent Communication:

Where All stakeholders are encouraged to share information openly and provide feedback regularly. This transparency fosters trust and collaboration.

Visual Communication Tools:

Like Kanban boards and value stream maps are used to communicate project progress, bottlenecks, and improvement opportunities in a clear and concise way.

Similar to Agile, daily stand-up meetings:

Are crucial for identifying roadblocks, discussing progress, and ensuring everyone is aligned.


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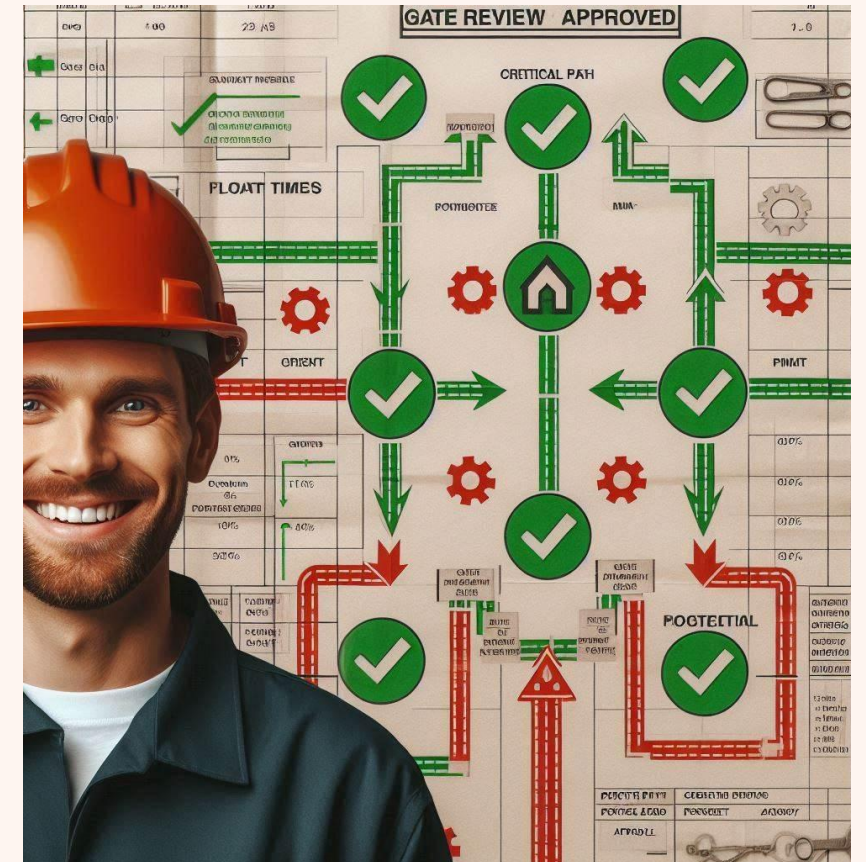
The Communication in the Lean

Benefits:

- Encourages a culture of open communication and problem-solving.

- Promotes continuous improvement through information sharing and feedback.

- Visual tools enhance communication clarity and understanding.

Challenges:

- Requires a cultural shift towards transparency and open communication.

- May require additional training for effective use of visual communication tools.
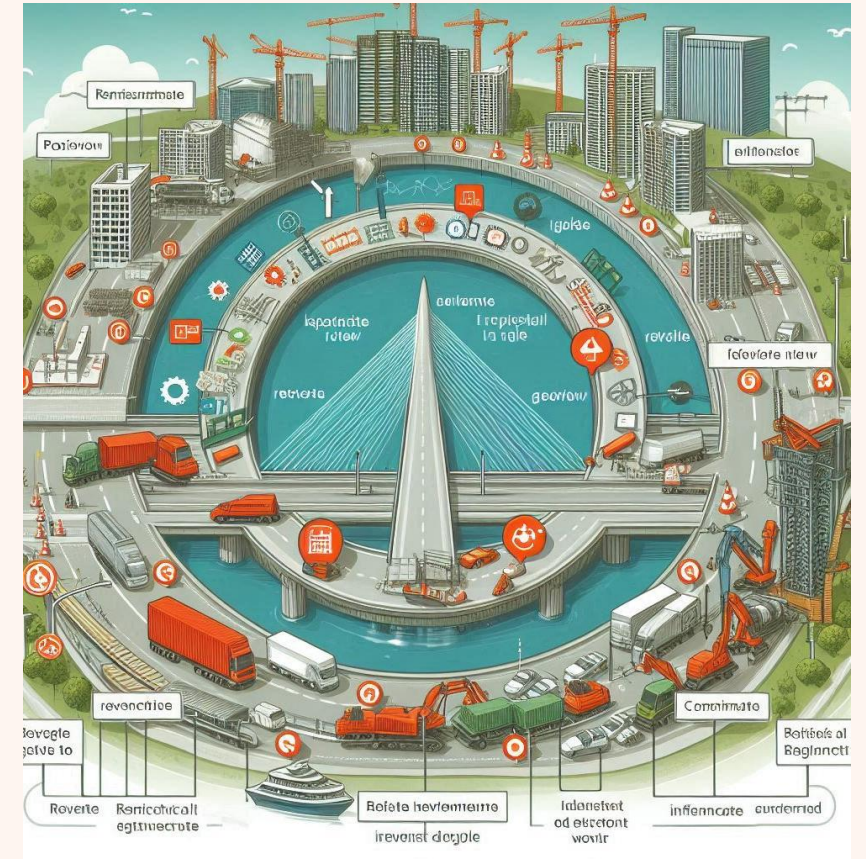
The Communication in the Kanban

Kanban, a visual workflow management method, focuses on continuous flow and maximizing efficiency. Communication governance in Kanban projects centres around:

Kanban Boards as the Primary Communication Tool:

Visual Kanban boards display project tasks, their status, and potential bottlenecks. This provides a real-time communication channel for the entire team to understand project progress.

Daily Stand-up Meetings (Short and Focused):

These brief meetings facilitate quick updates on task progress, identification of roadblocks, and collaborative problem-solving.

Visual Updates and Documentation of Decisions:

Key decisions and lessons learned are documented visually on Kanban boards or in readily accessible locations to ensure everyone is informed.

The Communication in the Kanban

Benefits:

• Promotes real-time visibility and transparency through Kanban boards.

• Short daily meetings keep communication focused and efficient.

• Emphasis on visual communication fosters collaboration and information sharing.

Challenges:

• May not be suitable for complex projects with intricate dependencies.

• Requires a disciplined team culture to maintain and update Kanban boards effectively.


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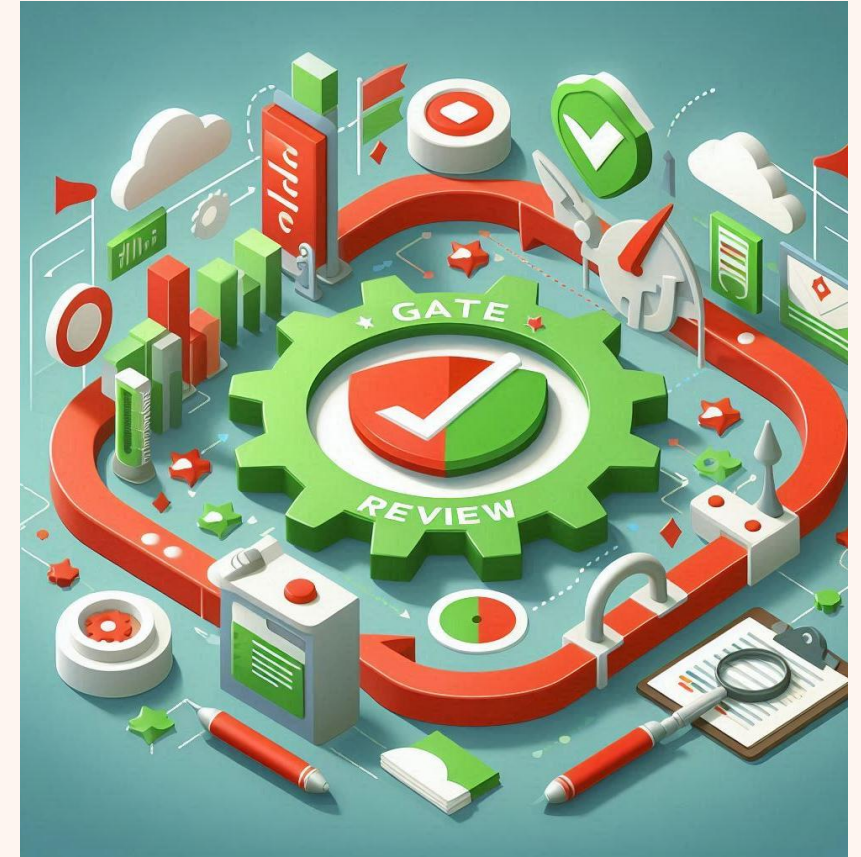
The Gate Review Models

The key takeaway from the above thinking is to understand the communication needs of your project and select the methodology or create a **hybrid** approach that best facilitates **clear information flow**, **stakeholder engagement**, and ultimately, project **outcomes**.

Therefore, we can design the Gate Review Process Map Model as following:

- **Regular Gate Reviews: These are scheduled at fixed intervals (e.g., monthly) to assess project progress, identify risks, and make necessary adjustments.**

- **Stage-End Gate Reviews: These occur at the completion of a project phase to determine if the project can proceed to the next phase.**

- **Ad-Hoc Gate Reviews: These are triggered by specific events or circumstances (e.g., significant changes in scope, budget, or schedule) and require immediate assessment.**
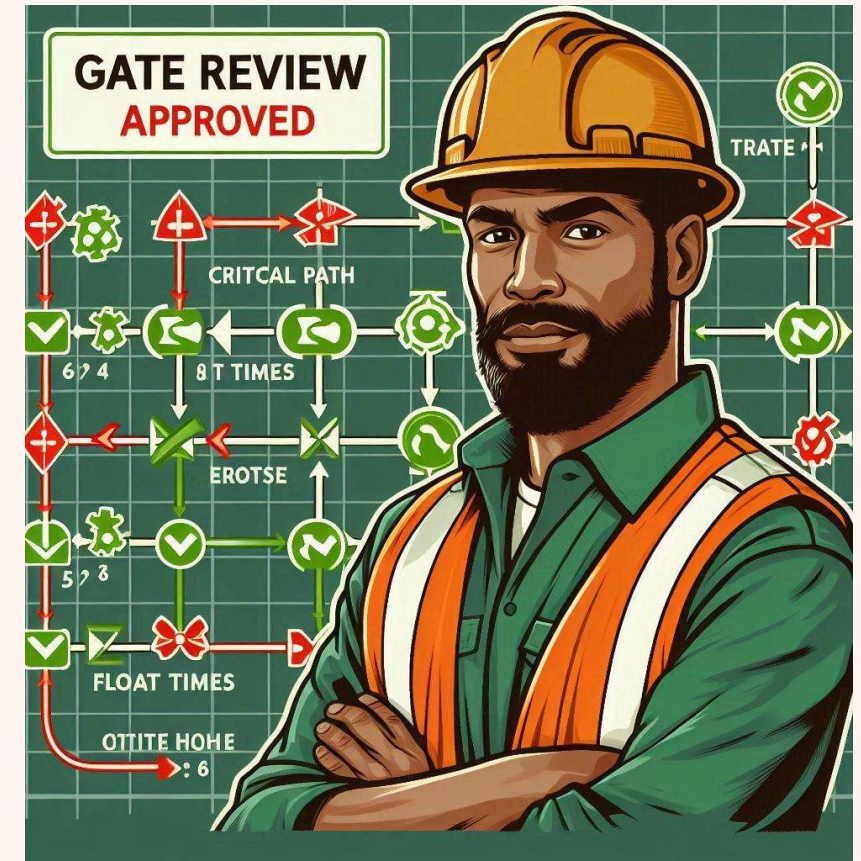
Incorporating Gate Reviews into the Project Schedule

To effectively integrate gate reviews into the project schedule, you can:
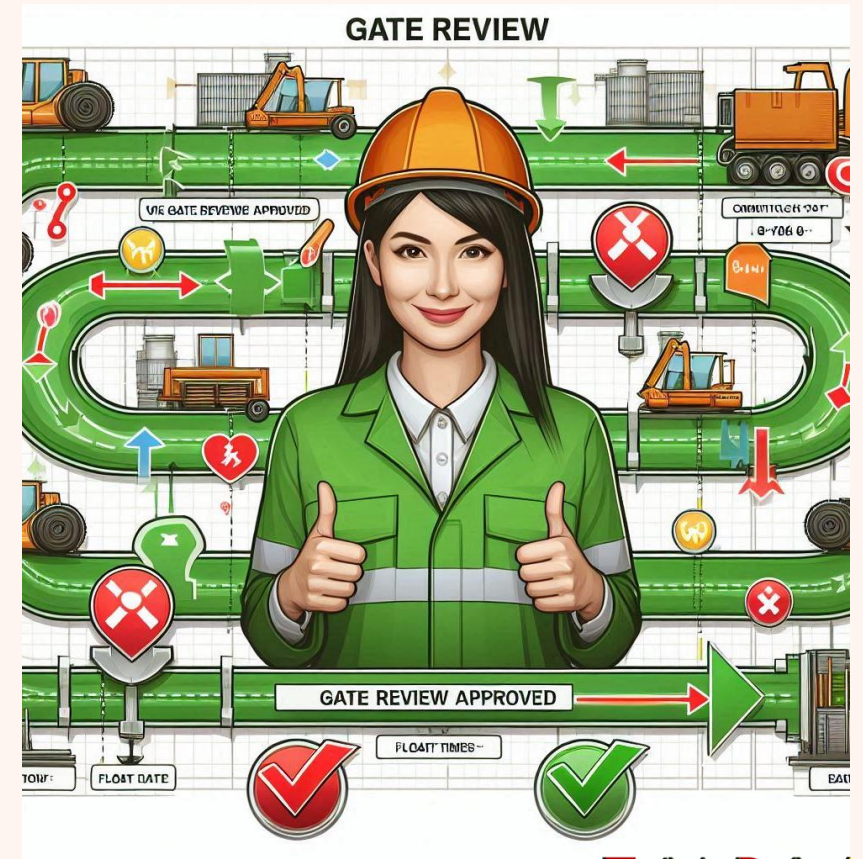
Identify Key Gate Review Points:

Determine where in the project lifecycle gate reviews are necessary.

Assume The Ad Hoc Decision Points:

Determine where in the project lifecycle gate reviews are necessary.

Schedule Gate Review Meetings:

Allocate time for gate review meetings in the project calendar.

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Incorporating Gate Reviews into the Project Schedule

Define Gate Review Criteria:

Establish clear criteria for each gate review input and when it should be ready.

Assign Responsibilities:

Determine who will lead and participate in gate reviews.

Release Schedule Baseline:

Create a baseline including the above details, Record the assumptions in the narrative and indemnify the schedule risks and its mitigation strategy.

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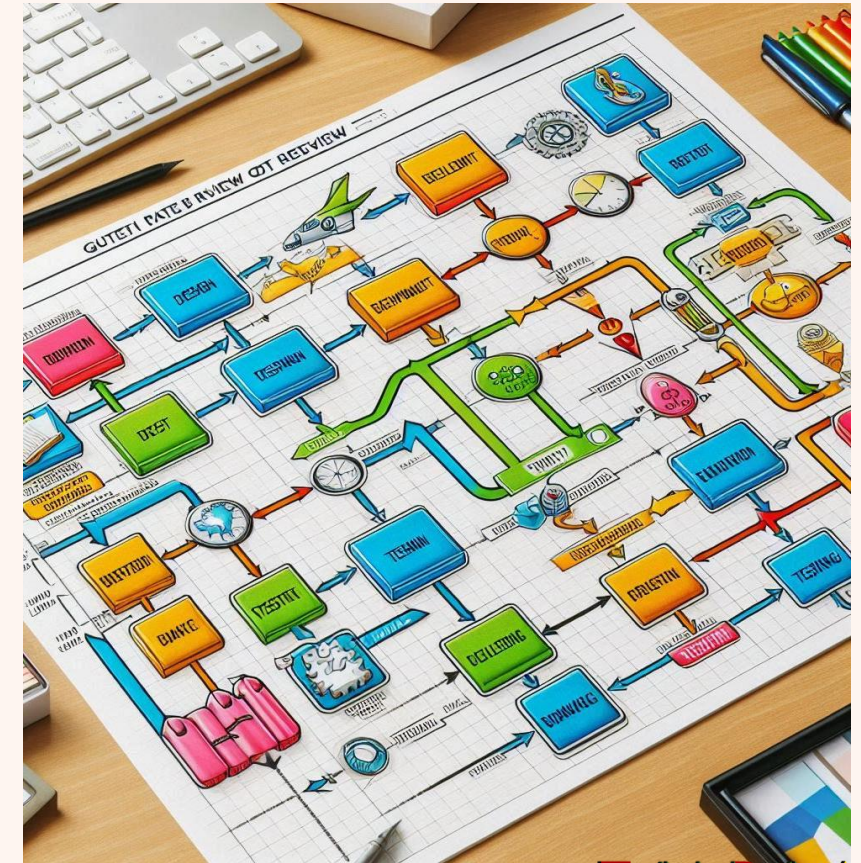# Rescheduling Gate Reviews - Before the Gate Review

Sometimes, your plans might not be achieved. Delays happened, especially with top busy stakeholders.

Scenario 1: Not all inputs are ready:

- Determine if you will proceed with the current information.

- Evaluate the risks and present it clearly.

- Provide new schedule plan considering the new status for gate review.

Scenario 2: The critical inputs are not ready

- Reschedule the gate review.

- Provide different dates options for the gate review.

- Provide schedule recovery strategy to achieve the delays.

- Provide new schedule revision with all schedule risks.

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Rescheduling Gate Reviews - After The Gate Review

Scenario 1: Successful GR with minor comments approval

- Analyze the schedule and provide new revision of the schedule with the comments incorporated as actions in the schedule.

- Evaluate the risks and present it clearly.

- Provide recovery schedule if possible.

- Highlight, if new completion date is required and why?

Scenario 2: Some Critical Comments or New Instruction

- Provide new schedule revision .

- Provide schedule recovery strategy to achieve the delays.

- Provide new schedule revision with all schedule risks.
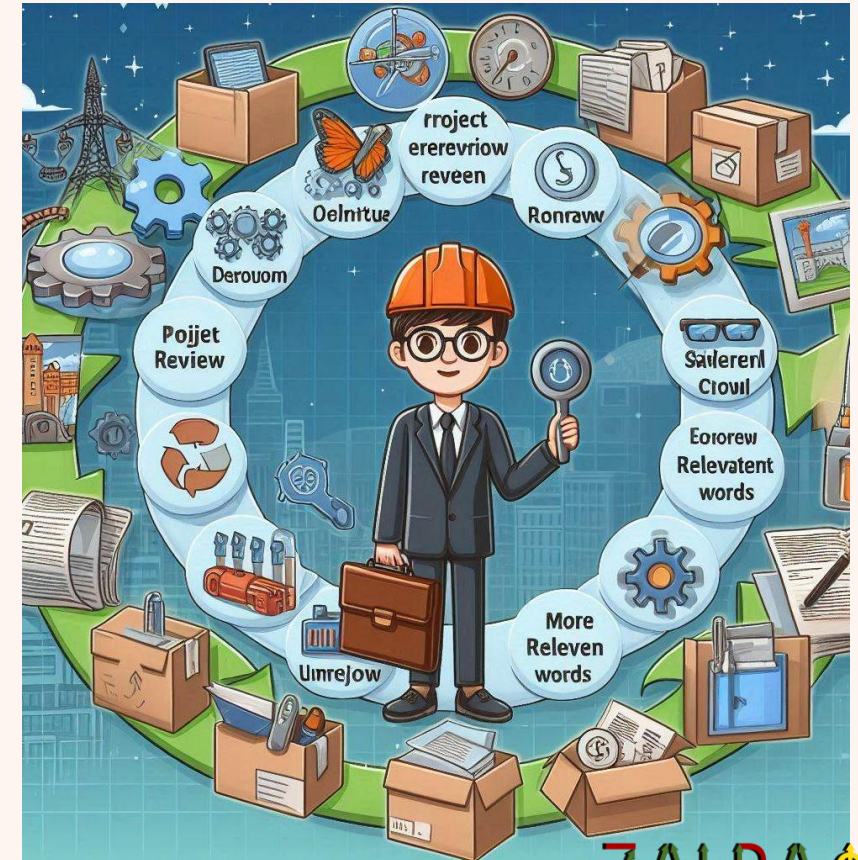
Conclusion

Gate review planning is most effective with a regular Gate Review Dates schedule. While staged schedule and ad-hoc reviews (which may occasionally be necessary), they present greater complexity in scheduling.

Essential elements of schedule gate review include:-

Schedule confirmation or revision:
Ensure all stakeholders are aligned on meeting times and agendas.

Post-review action planning:
Develop and implement changes based on gate review outcomes.

Contingency planning:
Maintain a recovery strategy to address unexpected challenges.

Risk assessment:
Continuously evaluate potential schedule uncertainty.

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