regoUniversity 2019

SAN DIEGO

Stage Gating

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Introductions

- Take 5 Minutes
- Turn to a Person Near You
- Introduce Yourself
- Business Cards

Agenda

- What are Stage Gates / Phase Gates
- Sample Stage Gate Process
- Open Mic
- Tracking Gates in Clarity PPM – OOTB Options
- Tracking Gates in Clarity PPM – Configuration Options
- Open Mic
- Rego Best Practices
  - Option 1: Data Tracking
  - Option 2: Workflow and Data Tracking
- Summary

Introduction

How do companies track stage gates within Clarity PPM?

This session will review some best practices for tracking, monitoring, and approving stage gates within Clarity PPM.

We will discuss pros and cons of various options to help you select the best method for your company.

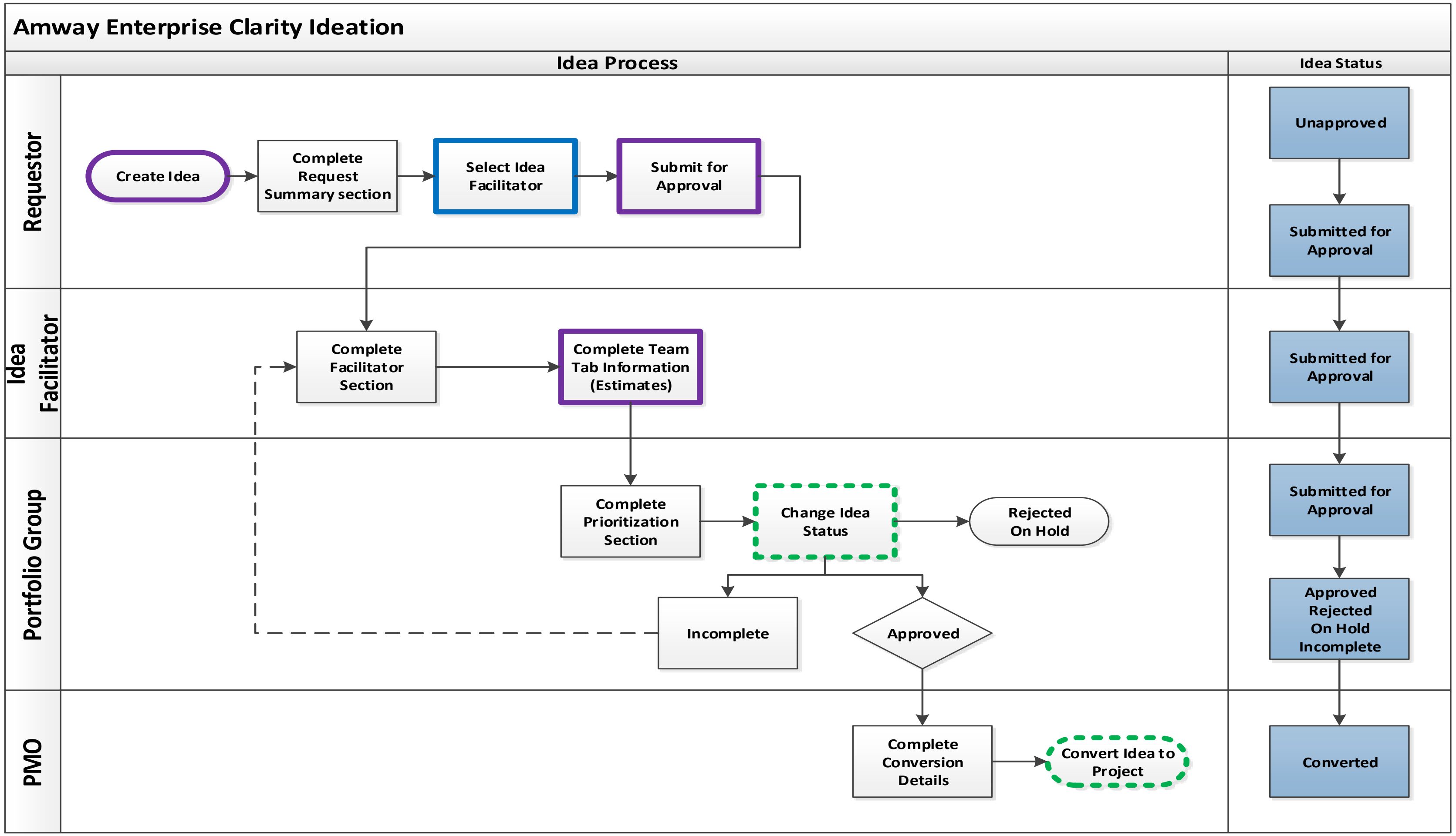
Definition

- What is a Stage or Phase Gate?
  - A phase–**gate** model, also referred to as a phase–**gate** process, is a project management technique in which an initiative or project is divided into **stages** or phases, separated by **gates** (milestones or decision points)
  - Establishing a stage gate model includes defining:
    - Gates – at what points in the idea/project lifecycle are we stopping for reviews?
    - Criteria for gate reviews (Entrance and Exit Criteria)
    - Deliverables
    - Outputs or artifacts
- Leveraging gates during a project lifecycle is a critical best practice process.
  - Based on the size and maturity of your organization, the process may be manual, partially automated or fully automated

Why Do Companies Use Stage-Gates?

- Standardization
  - Ensure PMs use a consistent, best practice methodology
- Governance
  - Improve the quality of reporting data, and overall project management by enforcing gate reviews and approvals
- Maturity
  - Mature the organizations project management practices

Sample Idea Stage Gate Process



= Email Notification

= Date/Time Stamp

= Both Email & Time Stamp

Open Mic

- How does your company use Stage or Phase Gates?
  - Ideation
  - Project Lifecycle
  - New Product Development
  - R & D
- Where do you track Stage Gate questions/answers, information, approvals, approved $, etc? in Clarity PPM or in documents?
- Does your company incorporate formal or informal Stage or Phase gate reviews.
  - Quality Checks
  - Audit mechanisms
- What about Agile or Hybrid Agile/Waterfall? Does your company use Stage or Phase gates for these?

Tracking Gates in Clarity PPM: OOTB Options

- Stage Field
  - There is an OOTB stage field on the project and idea objects.
  - You can set the overall stage of the investment within this field. It can be manually set or you can change the values based on a process
  - You can have multiple Stage methodologies, such as SLDC and DMAIC.
- Charge Code
  - Since the introduction of the “cost type” attribute, we have seen a number of companies use the charge code attribute on project and task to represent the stage/phase of a project.
  - Because it is a field on task, you can gather task metrics on the time by phase of a project.
  - This represents the stage of time tracked, but does not help to track “gate” information
- Milestones
  - Within the project plan, you can setup milestones for each stage gate approval
  - Using OOTB baselines, you can track the baseline gate approval date and the actual stage signoff
  - Often we see a milestone “type” for stage gate approval

Tracking Gates in Clarity PPM: Config Options

- Investment Sub-object
  - Every new investment automatically creates a set of sub-object stage gates
  - The sub-object contains fields like approvers, target dates, approved amounts, and other fields to determine if the gate should be passed
  - The object can route through an approval and sometimes snapshots the financial or resource information on the project (current NPV, benefits, costs, budget, etc)
- Investment Fields and Subpage
  - Create a subpage for all gate information or one subpage per gate and add gate related fields
  - Have subpages show up or hide based on the gate you are in

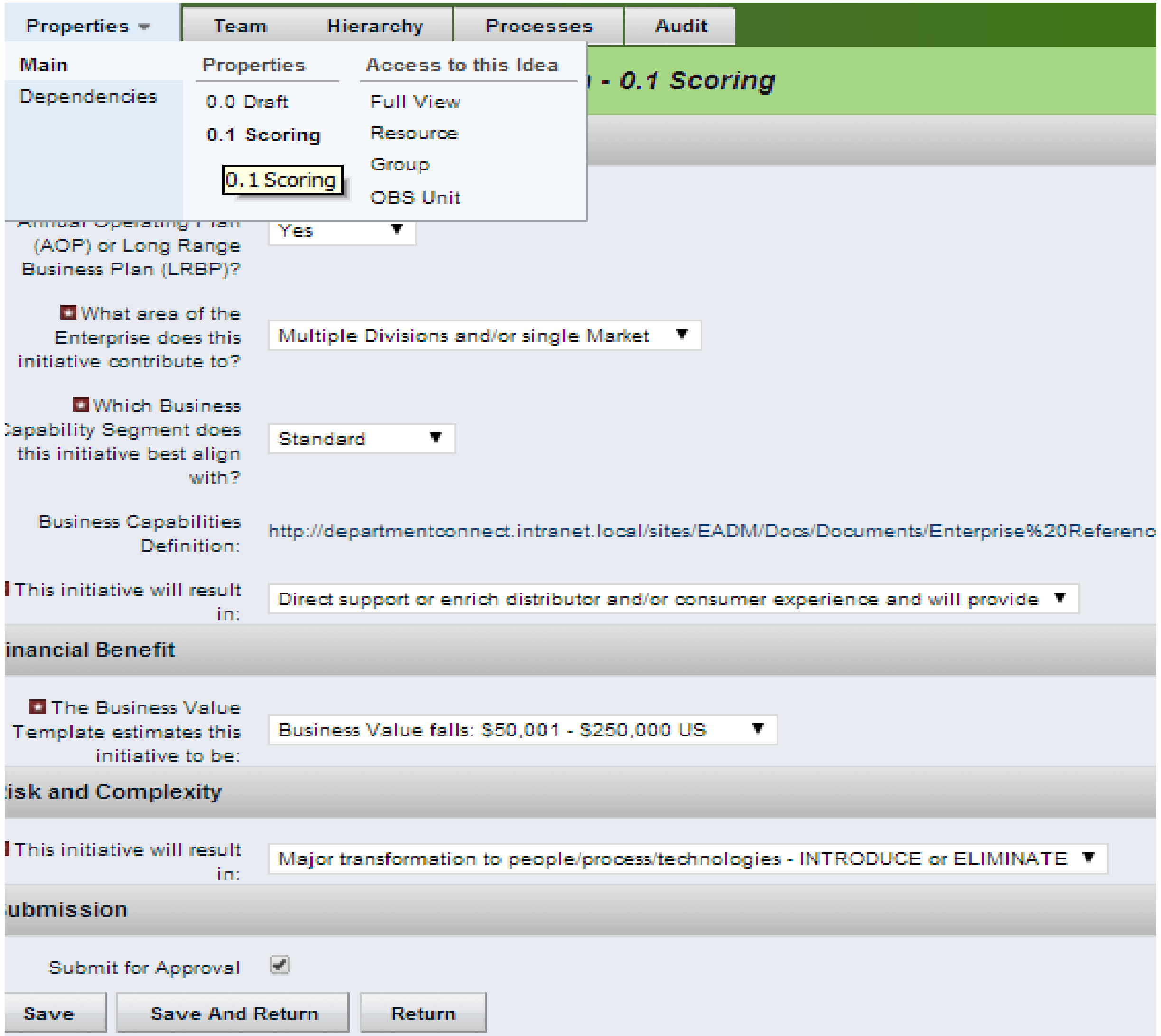
Open Mic

- Which method do you use?
- Any lessons learned?

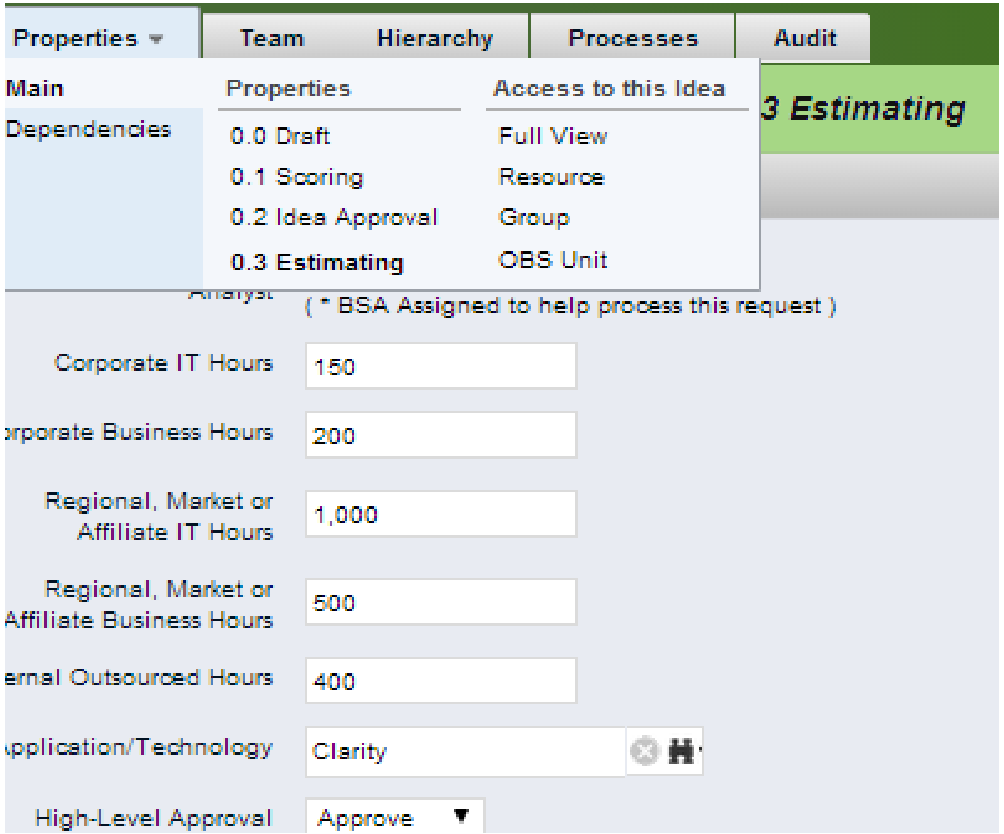
Rego Best Practice

- Option 1 (If you simply want data tracking)
  - Leverage the investment fields to track stage gate information
    - TIP: Use Stage field in conjunction with Type and Category
    - TIP: Lookup for Stages is called Investment Type
  - Have stage-specific subpages with display conditions so they don’t appear until the phase is active
  - Lock the OOTB stage field and control with process based on subpages
  - Capture stage gate dates using milestones

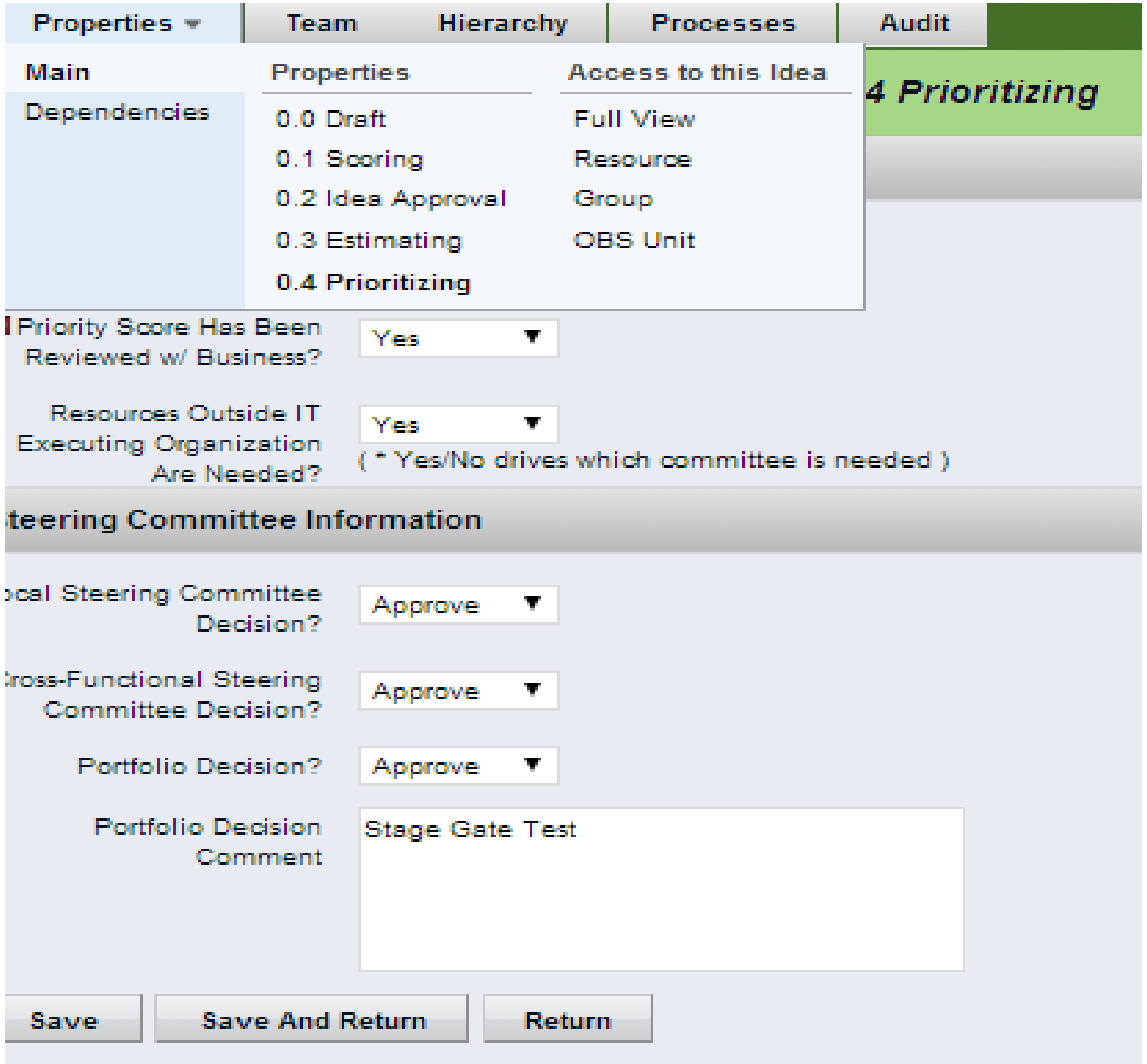
Option 1 Screenshots (1 of 3)



Option 1 Screenshots (2 of 3)



Option 1 Screenshots (3 of 3)

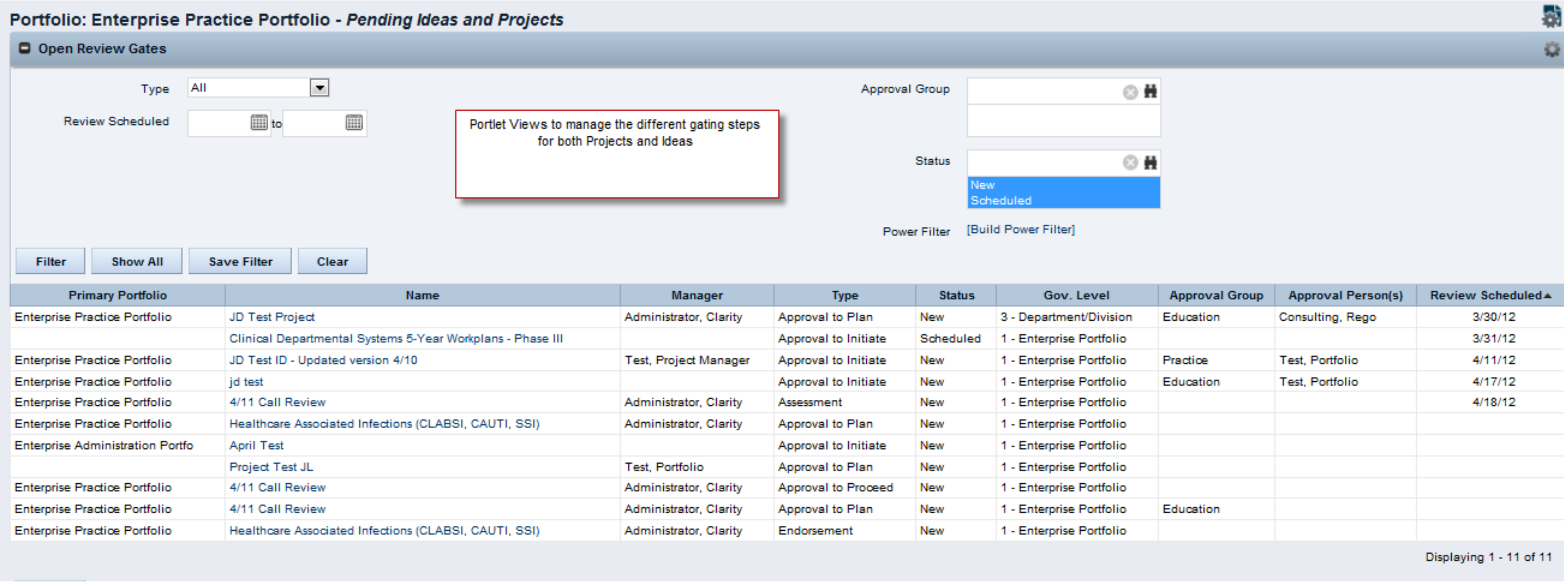


Rego Best Practice

- Option 2 (If you want workflow approvals and snapshot data)
  - Leverage the sub object to store snapshot of key data
  - Lock the OOTB stage field and control with process based on subpages
  - Capture stage gate dates using milestones

TIP: Avoid creating a single, large, complex process with a single start and finish. This makes administration much more difficult. Instead build multiple, smaller processes, where the termination of one process initiates the next.

Option 2 Screenshots



Portfolio: Enterprise Practice Portfolio - *Pending Ideas and Projects*

Open Review Gates

Type: All

Review Scheduled: to

Approval Group

Status: New, Scheduled

Power Filter: [Build Power Filter]

Filter | Show All | Save Filter | Clear

Portlet Views to manage the different gating steps for both Projects and Ideas

Primary Portfolio	Name	Manager	Type	Status	Gov. Level	Approval Group	Approval Person(s)	Review Scheduled
Enterprise Practice Portfolio	JD Test Project	Administrator, Clarity	Approval to Plan	New	3 - Department/Division	Education	Consulting, Rego	3/30/12
	Clinical Departmental Systems 5-Year Workplans - Phase III		Approval to Initiate	Scheduled	1 - Enterprise Portfolio			3/31/12
Enterprise Practice Portfolio	JD Test ID - Updated version 4/10	Test, Project Manager	Approval to Initiate	New	1 - Enterprise Portfolio	Practice	Test, Portfolio	4/11/12
Enterprise Practice Portfolio	jd test		Approval to Initiate	New	1 - Enterprise Portfolio	Education	Test, Portfolio	4/17/12
Enterprise Practice Portfolio	4/11 Call Review	Administrator, Clarity	Assessment	New	1 - Enterprise Portfolio			4/18/12
Enterprise Practice Portfolio	Healthcare Associated Infections (CLABSI, CAUTI, SSI)	Administrator, Clarity	Approval to Plan	New	1 - Enterprise Portfolio			
Enterprise Administration Portfo	April Test		Approval to Initiate	New	1 - Enterprise Portfolio			
	Project Test JL	Test, Portfolio	Approval to Plan	New	1 - Enterprise Portfolio			
Enterprise Practice Portfolio	4/11 Call Review	Administrator, Clarity	Approval to Proceed	New	1 - Enterprise Portfolio			
Enterprise Practice Portfolio	4/11 Call Review	Administrator, Clarity	Approval to Plan	New	1 - Enterprise Portfolio	Education		
Enterprise Practice Portfolio	Healthcare Associated Infections (CLABSI, CAUTI, SSI)	Administrator, Clarity	Endorsement	New	1 - Enterprise Portfolio			

Displaying 1 - 11 of 11

Idea: General Idea Submission - *Create Review Gate*

General

Gate Status: New

Gate Type: Approval to Initiate

Governance Level: 1 - Enterprise Portfolio

Review Scheduled: 5/5/2012

Review Completed:

Review Group: Practice

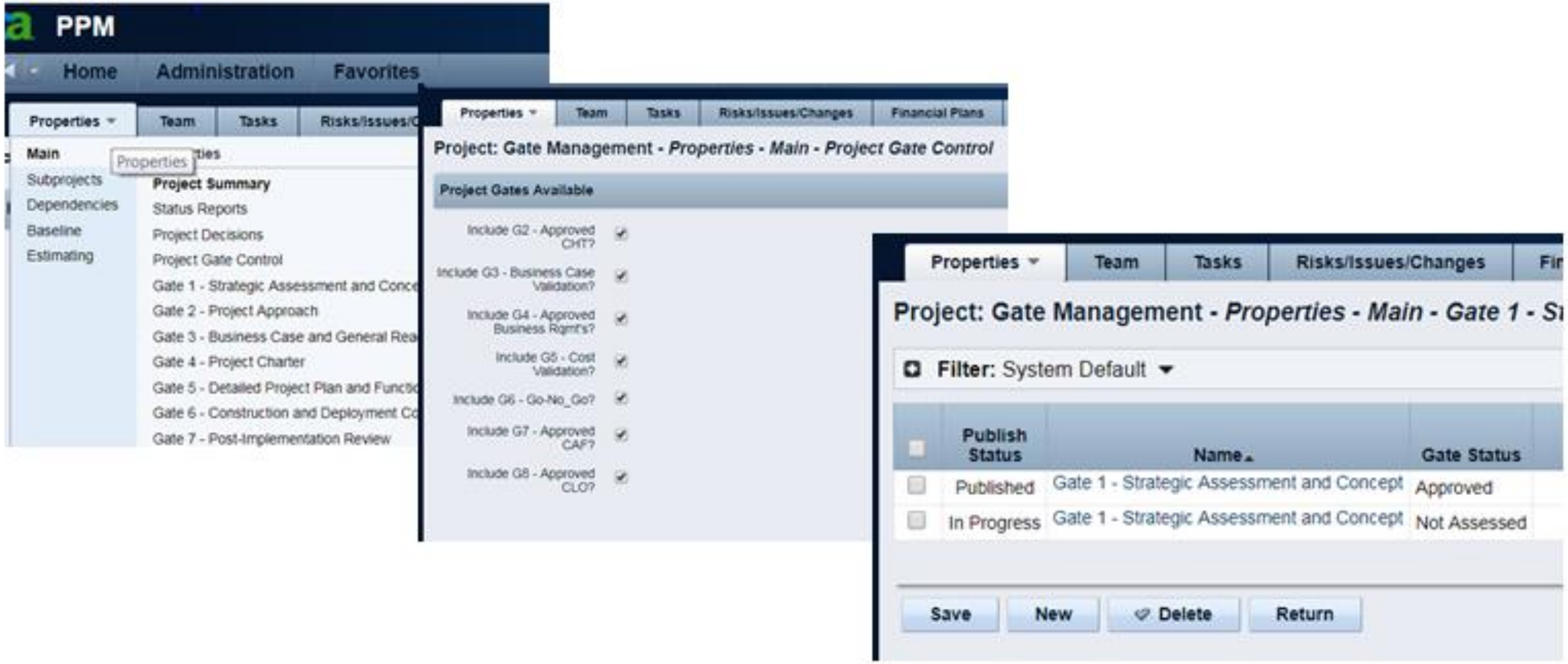
Review Person(s): Administrator, Clarity

New Idea Stage Gate is created

Save | Save And Return | Return

= Required

Option 2 (b)


PPM
Home
Administration
Favorites
Properties
Team
Tasks
Main
Subprojects
Dependencies
Baseline
Estimating
Project Summary
Status Reports
Project Decisions
Project Gate Control
Gate 1 - Strategic Assessment and Conce
Gate 2 - Project Approach
Gate 3 - Business Case and General Rea
Gate 4 - Project Charter
Gate 5 - Detailed Project Plan and Functio
Gate 6 - Construction and Deployment Co
Gate 7 - Post-Implementation Review
Properties
Team
Tasks
Risks/Issues/Changes
Financial Plans
Project: Gate Management - Properties - Main - Project Gate Control
Project Gates Available
Include G2 - Approved CHT?
Include G3 - Business Case Validation?
Include G4 - Approved Business Rqmt's?
Include G5 - Cost Validation?
Include G6 - Go-No_Go?
Include G7 - Approved CAF?
Include G8 - Approved CLO?
Properties
Team
Tasks
Risks/Issues/Changes
Project: Gate Management - Properties - Main - Gate 1 - S
Filter: System Default
Publish Status
Name
Gate Status
Published
Gate 1 - Strategic Assessment and Concept
Approved
In Progress
Gate 1 - Strategic Assessment and Concept
Not Assessed
Save
New
Delete
Return

Option 2 (b)

Master Gate Schedule

Project Name	Next Project Gate	Gate 1 Forecast Date	Gate 2 Forecast Date	Gate 3 Forecast Date	Gate 4 Forecast Date	G
Test Plan Project	1 - Strategic Assessment and Concept	11/26/15				
Gate Management	4 - Project Charter	11/30/16	12/30/16	2/28/17	3/31/17	
Steph - Clean MSP Project Test	3 - Business Case and General Readiness					

Summary

- Clarity is a perfect place to track stage gate information – amounts approved, approved by, etc
- There are many options to configure Clarity for use – be sure to select one that meets your needs and provides automation
- Process is essential – you need a defined business process in place before you automate or track data in Clarity

Questions?

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- Click on **Report PDU's**
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- Class Name = **regoUniversity**
- Course Number = **Session Number**
- Date Started = **Today's Date**
- Date Completed = **Today's Date**
- Hours Completed = **1 PDU per hour of class time**
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- Click on **I agree** and **Submit**

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