

Example of gatekeeper training: Effective Gatekeeping

This seminar assumes

- That the gatekeepers have an idea of the new product process,
- but don't really understand its rationale,
- are not that familiar with the criteria and why certain criteria must be used at gates and,
- have not agreed to a set of rules of behavior and gate procedures.

If any of the above assumptions are not true, some of the training goals and sections can be deleted (or shortened).

Purpose of the Seminar;

- To provide gatekeepers with a better understanding of the rationale for the company's Product Development Process: the critical success factors, the reasons for the process, and why it is important that gatekeepers strongly support the process in a disciplined fashion.
- To educate gatekeepers on the structure of gates deliverables, criteria, outputs
- To provide insights into the role and responsibilities of gatekeepers, and what makes for a good gatekeeper and effective gatekeeping team.
- To educate gatekeepers regarding the procedures at gate meetings and the "rules of the game" for good gatekeeping.
- To agree on gating criteria and gate keeping rules to be used at the company.

Audience

Approximately 16-28 gatekeepers per training session (ideally 20).

Agenda:

8:30 Our Stage-Gate® Product Process

This introduction session provides a look at the Stage-Gate® Process, the reasons for it, the critical success factors in winning at new products, and how these are built into the Stage-Gate® process. This is an important session as one critical characteristic of an effective gatekeeper is that s/he knows the new product process and the principles that underlie it.

0:90: Problem Detection Team session

Teams meet to discuss the question what are the major problems barriers difficulties etc. that we face as gatekeepers? What stands in the way of effective gatekeeping?

10:15 Teams present: Conclusions of Problem Detection Session

10:45 Break

11:00 Gates in our company's process: Structure and Format

This session defines the structure of gates. The company's gate criteria are used. We explain why these criteria are used and how gates link to portfolio management.

12 15 Lunch

13:00 Effective Gatekeeping

This important session outlines the roles and responsibilities of gatekeepers, and what makes for a good gatekeeper and an effective gatekeeping team. The procedures for a well run gates are defined, and the "rules of the game" for the gatekeepers are specified. Agreement from gatekeepers is sought regarding rules and procedures.

14:30 Break

14:45 Making Gates Work: A Simulated Gate Meeting

Teams prepare for a gate meeting and a to be gatekeepers. One or more teams presents; the other team acts as gatekeepers. Note: this simulated gate meeting will be based on a real case, although to avoid biases, one not from our own company. Participants will have read and prepared the case prior to the seminar.

16:15 Discussion, conclusions and Questions and Answers

This final unstructured session, moderated by the two seminar leaders, discusses the learnings from the day and the simulated gate meeting, and moves towards conclusions and agreements as to how our company will run gate meetings to be most

effective. The need for further training, if any, will be identified. Other action items will be defined.

17:00 End

After the seminar

Follow-Up by Task Force

¹ Depending on the number of people at the seminars there may be anywhere from 2-4 teams. If 4 teams, then 2 present and 2 are gatekeepers

About Stage-Gate.EU and Innovation Management U3

We are a group of management consultants and specialists in improving new product performance and reducing time-to-market. We are part of an international network with partners in Europe and North America.

Our senior consultants are acknowledged experts in the field of innovation management, consulting and research. They have proven track records in the design and implementation of management approaches and have been successfully participating with major European and North American firms in this field for more than twenty years. In addition, several of our consultants have many years of experience as executives in the business community.

More information at <http://www.stage-gate.eu/>