



Default stages:

0. Idea → 1. Define → 2. Plan → 3. Execute → 4. Validate → 5. Launch → 6. Stabilize

Gate 1: Kick-off 0. Idea → 1. Define

- ☐ Problem and objective stated on one page
- ☐ **Strategic fit confirmed** (which company priority; why now)
- ☐ Rough value case framed (TDC, service, quality)
- ☐ Sponsor named and time committed
- ☐ Dependencies and constraints noted
- ☐ Next stage effort and cost estimated

Gate 2: Project Establishment 1. Define → 2. Plan

- ☐ Charter approved and stored
- ☐ Voice of Customer and key requirements captured
- ☐ Options explored, preferred concept chosen with reasons
- ☐ High-level risks mapped, top 3 mitigations defined
- ☐ Resource plan and skills confirmed (roles, % allocation)

Gate 3: Resource Commitment 2. Plan → 3. Execute

- ☐ Detailed plan with owners and dates
- ☐ Budget and materials approved
- ☐ KPI baseline taken; data plan defined
- ☐ Change management approach set (comms, training needs)
- ☐ Trial plan ready; pass/fail criteria clear
- ☐ **Development and Launch resources ask vs strategic priority check**
(is the effort and budget right for the priority level)



Gate 4: Project Validation 3. Execute → 4. Validate

- ☐ Trial completed; results vs criteria reviewed
- ☐ Issues list closed or parked with owners and dates
- ☐ SOPs/CBAs drafted or updated
- ☐ Training materials prepared (OPLs, quick guides)
- ☐ Readiness to scale agreed

Gate 5: Project Launch 4. Validate → 5. Launch

- ☐ Go-live plan approved; cutover risks controlled
- ☐ Support model defined (who fixes what, response times)
- ☐ Metrics on the board; daily review cadence set
- ☐ Supplier and logistics impacts confirmed
- ☐ Customer impact checked and accepted
- ☐ **Launch resources ask vs strategic priority re-check** (scale-up cost and capacity still justified)

Gate 6: Project Close 5. Launch → 6. Stabilize

- ☐ First 30 days results meeting target or trending to it
- ☐ Open actions closed or escalated
- ☐ Lessons learned captured to E&T and WPI
- ☐ Ownership transferred to line teams
- ☐ Project formally closed; benefits tracked quarterly

Gate decision record for each gate(include at a minimum):

- ✓ Decision: Go / Conditional Go / Hold / Stop
- ✓ Conditions and owners
- ✓ Additional approvals required (e.g., legal, safety, environmental impact, ...)
- ✓ **Strategy note:** confirm fit or explain deviation
- ✓ Date of next review