Five Elements of an Effective Stage Gate Process

Summary

This best practice explores five elements that are necessary for successfully executing a stage-gate process and dispels common myths. It proposes that effective stage gates are proactive, cross-functional, flexible, scalable, and lean.

Clarifying the Stage Gate Model

In May, 2008, Dr. Robert Cooper wrote an article in the Product Innovation Management Journal titled “The Stage-Gate Idea-to-Launch Process-Update: What’s New and NexGen System.” In the article, he clarified the many misconceptions about what a stage-gate model is and what it isn’t. This best practice paraphrases, summarizes, organizes the key concepts from that article, which is still relevant today, and proposes that there are five elements that make for a successful stage gate model.

Before we get into the five elements, let’s review the basic foundations of a stage-gate model.

A stage-gate model involves breaking each phase of the development cycle of a product into stages, each one followed by a decision gate as to whether to proceed to the next stage. For example, stages may be: Discovery, Scoping, Business Case, Development, Testing and Validation, Launch, and Post-Launch Review. At the end of each of those stages, a gate review meeting would be held to assess the deliverables or results produced by that stage, as well as the current prioritization and resource capacity. The goal of the gate meeting is to make a decision on whether to proceed to the next stage or take alternate action.

Generally, each stage serves to gather more information about the project, via a series of activities performed by various parties during that stage. By the end of the stage, agreed-upon deliverables are produced, and serve as input to the gate review meeting.

This best practice proposes that, in line with Dr. Cooper’s paper, to be effective, stages and gates in a stage-gate model should be proactive, cross-functional, flexible, scalable, and lean. Let’s examine each.

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