Gate 3 Checklist

Project name

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| Document status: |  |
| Version: |  |
| Date: |  |
| Author: |  |
| Owner: |  |

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**Guidelines for Project Manager**

**How to use this document**: (when complete, delete this page/guidance text)

This document is a formal artefact for projects to demonstrate evidence of appropriate approval to proceed to benefit review phase of a project. It will be used as part of a compliance check to ensure projects are following the approved project management framework.

**Board Approval**

The Project Executive, along with the Project Board is the approving authority for proceeding to the next phase. This approval is to be arranged as a formal Project Board meeting. The meeting agenda is to be specific to the Stage Gate and includes formal approval of the stage gate artefacts.

The Project manager is responsible for arranging the Board meeting and distributing the documents for review as part of the agenda papers. It is recommended that the Project Manager explain/remind the approval process to the Board members ahead of the stage gate meeting to provide the Board with adequate time to review documents and decide whether to proceed to the next phase.

**Stage Gate Artefacts**

There are four key artefacts for Stage Gate 2:

* Project Closure report
* Benefits realisation repot

These artefacts should be complete and reviewed by all necessary stakeholders and in a final state prior to the stage gate meeting. The Board should also be given copies of the final products to review and comment on prior to the meeting.

**IMPORTANT** – If the Project is being delivered in several stages, each release must be approved at a Stage Gate 3 review by the Project Board.

**Stage Gate Considerations**

The Project Manager should use Appendix A, Stage Gate Considerations, as a checklist to assist in preparing for the gate review.

**EPS Assurance Review**

When the Project Manager has completed the checklist, the CPO will review it and provide feedback and questions’, helping to ensure that appropriate preparation has been done for the deployment phase of the project. Evidence of review activities may be requested and must be accessible if required.

The Project Manager will present the Stage Gate Document to their Project Board for approval, along with the finalised mandatory artefacts.

This completed document is to be stored in the project repository as evidence of stage gate approval, along with the minutes of the Board meeting.

# Purpose

The primary function of **Stage Gate 3 – Benefits Review** is to ensure that the project or stage has successfully completed all planned Closure products and activities and is ready to move into benefits realisation stage.

All transition activities will be completed and endorsed by the Transition Manager. The benefit owners will be appropriately trained and ready to accept the ownership of harvesting the benefit(s).

Approval at this gate is a commitment that the Project Board is satisfied with the delivered products of the stage or the project.

## Project Summary

Provide a summary of what is included in this stage gate meeting. That is, mention what is being delivered in the scope of the stage, which products the Board need to specifically review/approve, and whether there are any outstanding issues the Board need to be aware of to decide whether to proceed.

## Stage Gate Artefacts (as applicable)

The following artefacts are inputs to Stage Gate 2 and are presented to the Project Board for approval.

|  |  |
| --- | --- |
| Project Closure Report | A Project Closure report confirming all required transition activities have been completed prior to benefits handover. |
| Lessons Learnt | A lessons learnt report that captures the ….. |
| Benefits Report | A benefits report that details all the benefits associated to the project/stage and the benefit owners and managers who will be responsible for measuring, tracking and harvesting the benefits |

# Approval to Proceed

Approval of **Stage Gate 3 – Benefit Review** indicates an understanding and formal agreement by the Project Board that the project is ready to proceed from Closure phase to benefit realisation activities.

Formal approval is captured by specifically stating Board **approval in the minutes of the meeting**.

The following people are the approving authority for this project:

|  |  |  |  |
| --- | --- | --- | --- |
| **Approver Name** | **Role**  | **Signature** | **Date** |
|  | Project Executive/Sponsor |  |  |
|  | Senior User (if applicable) |  |  |
|  | Senior Supplier (if applicable) |  |  |

# Open Issues

If applicable, describe any open issues which are relevant to this deployment, and plans for resolution.

| **Issue** | **Planned Resolution** |
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# Appendix A: Project Manager’s Stage Gate Considerations

This checklist is completed by the Project Manager to provide confidence to the Project Board that all stage considerations are complete.

|  |  |  |  |
| --- | --- | --- | --- |
| **Consideration**  | **Artefact** | **Complete** | **Comments/Reference** |
| * Project closure

*Have all they key project stakeholders approved the report* | Project Closure Report |  |  |
| * Lessons Learnt

*Meeting with Business Change Manager and key business stakeholders to endorse readiness* | Lessons Learnt Report |  |  |
| * Benefits Realisation

*Test Manager approval provided.* | Benefits Realisation Plan |  |  |