GATE REVIEW MEETING PREPARATION CHECKLIST

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A. Stage-Gate Review Checklist

1   PROJECT OVERVIEW

☐ Project name and unique ID

☐ Stage-Gate position (e.g., Gate 3 – Development Review)

☐ Project goal and business context

☐ Summary of current status and timeline

☐ Alignment with portfolio strategy or business goals

☐ History of past gate outcomes and key changes

2   DELIVERABLES & MILESTONES

☐ List of stage-specific deliverables

☐ Completion status (done, in progress, blocked)

☐ Supporting documents (attach or link)

☐ Key milestones achieved

☐ Explanation of any deviations from plan

☐ Quality checks or verification activities completed

3. BUSINESS CASE

☐ Updated cost projections (development, marketing, launch)

☐ Revenue and profitability projections (short and long-term)

☐ Market data updates: size, growth, trends, customer feedback

☐ Competitive landscape

☐ Strategic fit

☐ Sensitivity or scenario analysis

☐ Overall business justification

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4. RISK & OPPORTUNITY ASSESSMENT

- ☐ Updated risk register (with owner, probability, impact)
- ☐ Top critical risks & mitigations
- ☐ Legal or regulatory risks
- ☐ Compliance and data/privacy issues
- ☐ Key assumptions validated or invalidated
- ☐ Opportunities or competitive advantages

5. TECHNICAL & EXECUTION REVIEW

- ☐ Technology readiness / feasibility
- ☐ Prototypes or proof of concept status
- ☐ Manufacturing or operational capabilities
- ☐ Supply chain readiness
- ☐ Testing results or pilot feedback
- ☐ Resource planning (people, equipment)
- ☐ IT or system dependencies

6. FINANCIAL & RESOURCING REVIEW

- ☐ Budget consumed vs. planned
- ☐ Budget forecast for next stage
- ☐ Resource availability and capacity
- ☐ External partners or vendors engaged
- ☐ Investment-to-date vs. projected returns

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7. STAKEHOLDER & TEAM ALIGNMENT

- ☐ Sponsor feedback and involvement
- ☐ Cross-functional participation status
- ☐ Team morale or engagement indicators
- ☐ Conflicts or interdepartmental dependencies
- ☐ Customer validation (if applicable)
- ☐ Executive-level visibility

8. LESSONS LEARNED & FEEDBACK

- ☐ What worked well during this stage?
- ☐ What caused delays or issues?
- ☐ Key takeaways for next phase
- ☐ Suggestions from the team

9. GATEKEEPER RECOMMENDATION

- ☐ Clear recommendation: Proceed / Hold / Redirect / Terminate
- ☐ Justification for the recommendation
- ☐ Required conditions if proceeding (e.g., fix X before starting Y)
- ☐ Proposed Go-to-Next-Stage timeline

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B. Gate Specific Checklists

GATE 1: IDEA SCREEN

- ☐ Clarify market need and customer pain points
- ☐ Evaluate strategic alignment and innovation level
- ☐ Estimate initial development and launch costs
- ☐ Assess feasibility and technical risk assumptions
- ☐ Determine potential ROI and business impact
- ☐ Recommendation: Proceed with feasibility or reject idea

GATE 2: PRELIMINARY INVESTIGATION

- ☐ Summarize feasibility study findings
- ☐ Document customer interviews or VOC insights
- ☐ Present refined market sizing and segmentation
- ☐ Identify potential risks and early mitigation ideas
- ☐ Outline next-stage investigation plan
- ☐ Update cost and timeline estimates
- ☐ Recommendation: Proceed with business case development

GATE 3: DEVELOPMENT REVIEW

- ☐ Present detailed business case and financials
- ☐ Confirm finalized user and technical requirements
- ☐ Show prototype progress and validation results
- ☐ Verify development resource and budget availability
- ☐ Identify remaining risks and mitigation strategy
- ☐ Recommendation: Proceed to full development

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GATE 4: TESTING & VALIDATION

☐ Share results from beta tests or field trials

☐ Validate customer feedback and satisfaction

☐ Demonstrate supply chain and manufacturing readiness

☐ Review compliance and regulatory documentation

☐ Confirm go-to-market and support plans

☐ Recommendation: Proceed to launch preparation

GATE 5: LAUNCH/POST-LAUNCH

☐ Evaluate product performance vs. launch KPIs

☐ Review sales uptake and customer adoption

☐ Document issues and resolutions post-launch

☐ Summarize lessons learned across project lifecycle

☐ Plan for ongoing support and product ownership

☐ Recommendation: Close project or move to next phase

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