PPM·Factory
PROJECT PORTFOLIO MANAGEMENT

WHITE PAPER

NPD GOVERNANCE PLAYBOOK

The Modern Guide to NPD Stage-Gate Governance

A practical playbook for product leaders ready to industrialize their new product development pipeline

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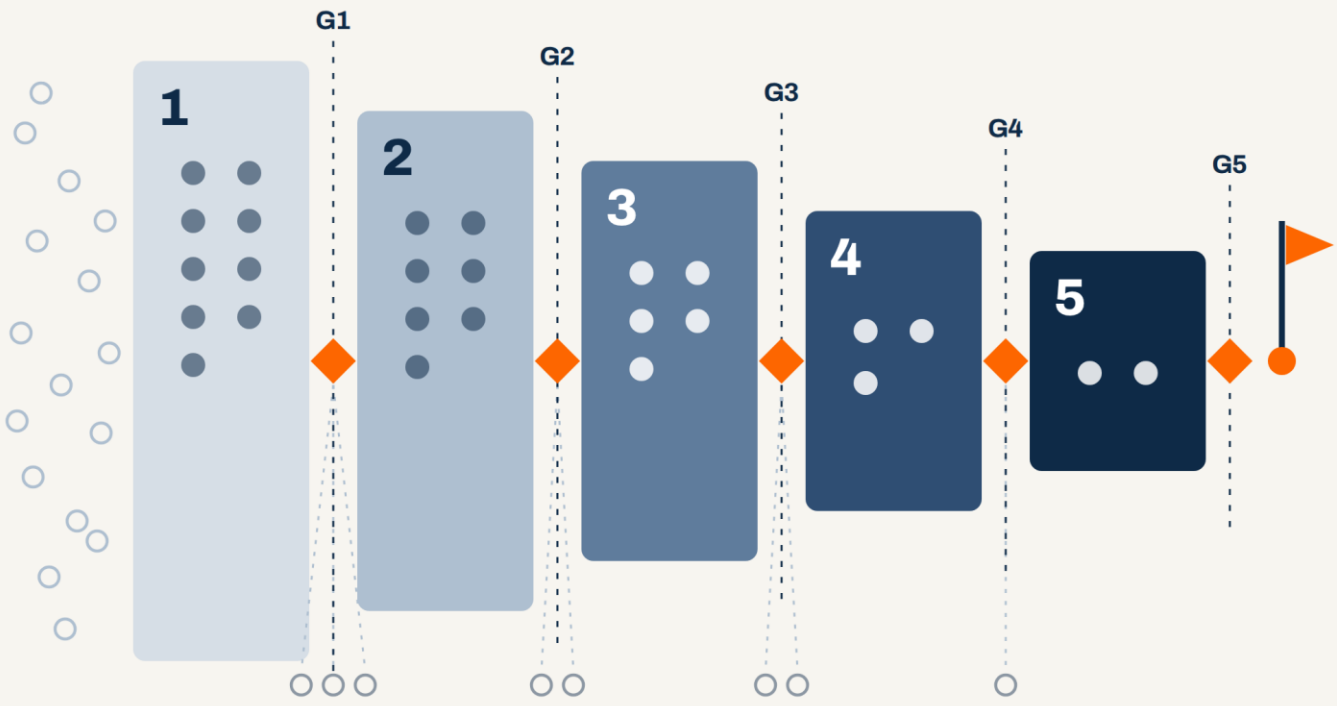

For product leaders, R&D directors and portfolio managers

EXECUTIVE SUMMARY

Gates are decisions, not paperwork

Most companies already have a stage gate process on paper. Far fewer have one that stops weak projects early, funds strong ones fully and keeps the pipeline within capacity.

This playbook shows how to turn stage gate governance from a compliance ritual into an industrial decision system. It is organized around five building blocks, each with design choices you can apply in your next planning cycle.



Throughout, governance is scaled to risk: a line extension should not carry the overhead of a new platform, and a bet-the-business program should never skip its business-case gate.

THE CORE MESSAGE

Every gate ends with a decision the team can act on the same day: go, kill, hold or recycle.

The paper closes with the indicators that show whether your gates work, a 90-day rollout plan, a self-assessment you can run in under an hour, and how PPM-Factory supports each building block.

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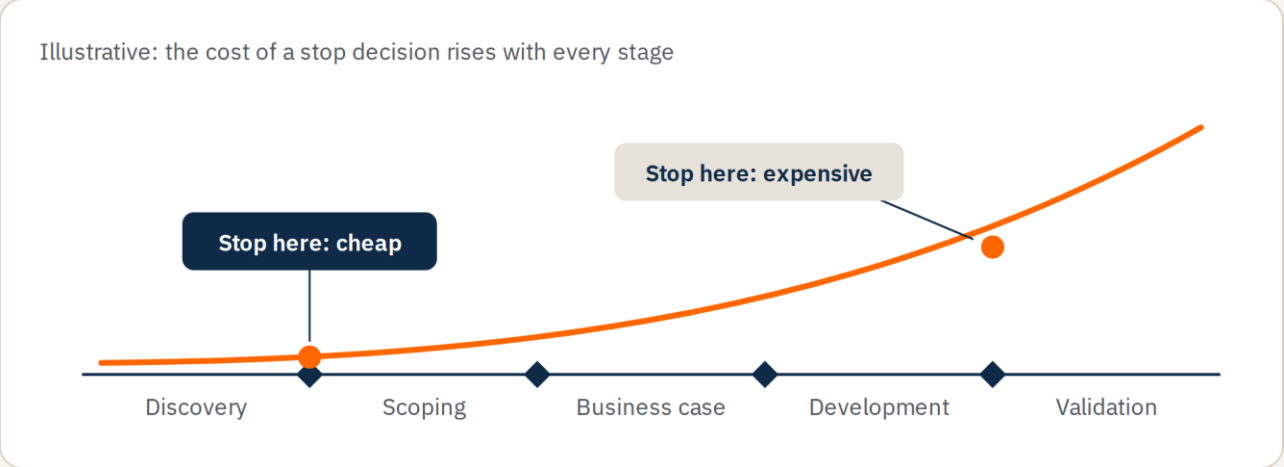
WHY IT MATTERS

Why stage gates stall

The problem is rarely the model. It is how gates are run: too late, too soft and too disconnected from the rest of the portfolio.

When a gate turns into a status meeting, projects pass by default. Weak ideas survive into costly development while strong ones wait for people booked elsewhere.



FOUR SYMPTOMS OF A STALLED GATE PROCESS

Rubber-stamp gates Almost everything passes, so the real decision happens elsewhere, or never.	**Pipeline gridlock** More projects are active than the organization can staff, so every project moves slower.
Late kills Projects are stopped after development spend, when the evidence was available much earlier.	**Paper governance** Gate packs are assembled in slides and spreadsheets for the meeting, then forgotten.

A gate that never says no is not a gate. It is a milestone with a meeting attached.

THE MODEL

The anatomy of a modern gate

Whatever the stage, every gate has the same three parts. That consistency is what lets gatekeepers compare projects and lets teams prepare without guessing what is expected.



THREE QUESTIONS EVERY GATE ANSWERS

Quality of execution	Strategic alignment	Credible plan
Was the stage done well enough to trust the evidence on the table?	Is this still the right project for our strategy and our portfolio?	Is the next stage realistic, funded and staffed with named people?

FOUR POSSIBLE DECISIONS, AND ONLY FOUR

■ Go	■ Kill	■ Hold	■ Recycle
Resources for the next stage are committed now, not promised later.	The project stops. People and budget return to the pool.	Worth doing, but not now. It waits for capacity or a trigger.	Back to the current stage to close named gaps, with a new date.

“Noted”, “approved in principle” and “come back next month” are not decisions. They keep a project alive without committing anything to it, which is how pipelines fill up with work no one is actually doing.

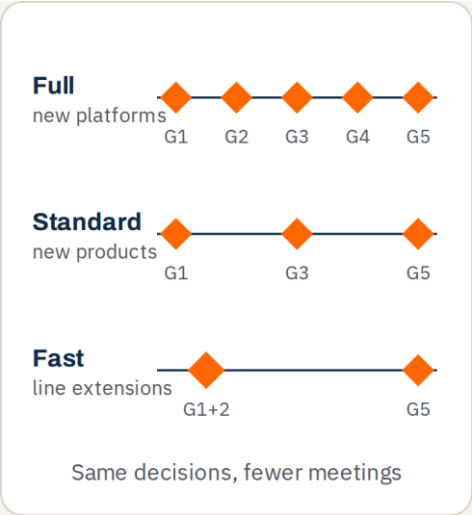
! A Go means resources are committed, not just permission granted. **A Go without people and budget is the most common cause of pipeline gridlock.**

BUILDING BLOCK 1 OF 5

Scale to risk

Right-sized gates for every project

One process for all projects smothers small ones or under-governs big ones. Route each project to a track by risk and investment.



DESIGN CHOICES

- Three tracks at most: full, standard and fast.
- Routing by investment and technical or market novelty.
- Lighter tracks combine gates, never skip decisions.
- A project can change track at any gate.

WHAT TO BUILD

01 **Routing criteria** A one-page rule that assigns each new idea to a track at its first gate.	02 **Track templates** Deliverables per gate and per track, so teams know what “enough” means.
03 **Combined gates** Where two gates merge, their criteria merge too. Nothing is waived silently.	04 **An escalation rule** A clear trigger to move a project to a heavier track when scope or risk grows.

HOW TO RIGHT-SIZE WITHOUT LOSING CONTROL

- **Start from last year’s projects.** Check which track each would have taken, and whether that feels right.
- **Cut paperwork, not decisions.** Lighter tracks mean shorter deliverables, not fewer chances to say no.
- **Review routing twice a year.** Adjust thresholds when too many projects land on one track.

SIGNAL IT WORKS	Small projects clear governance in weeks, and large ones never skip the business-case gate.

BUILDING BLOCK 2 OF 5

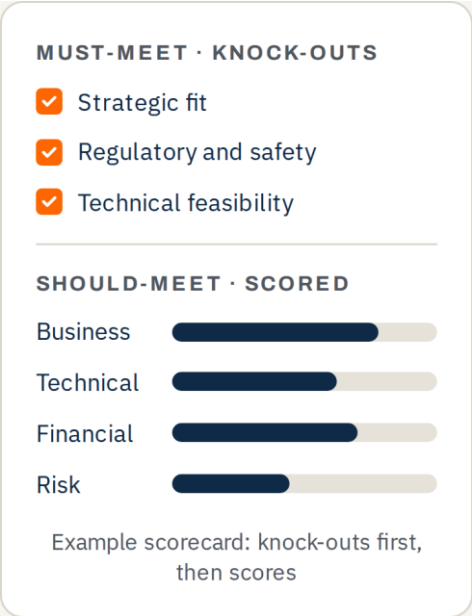
Scorecards

Criteria that turn opinion into evidence

Separate the questions that can stop a project from the ones that rank it against others.

DESIGN CHOICES

- Must-meet: yes-or-no knock-outs such as strategic fit.
- Should-meet: scored on business, technical, financial, risk.
- Anchored scales, each level described in plain words.
- Scores kept per gatekeeper and discussed, not averaged.



Example scorecard: knock-outs first, then scores

WHAT TO BUILD

01 **A criteria library** One shared set of criteria, with only a few additions specific to each gate.	02 **Anchored scoring guides** What a low, a medium and a high score look like for each criterion.
03 **Evidence links** Every score points to the deliverable that supports it.	04 **A decision log** The decision, its reasons and its conditions, recorded at the gate.

HOW TO SCORE WITHOUT GAMING THE SYSTEM

- **Score before the meeting.** Gatekeepers submit independently, then use the meeting to debate the gaps.
- **Discuss spreads, not averages.** A low and a high score on one criterion is the real conversation.
- **Check criteria against outcomes.** Once a year, see whether high scorers delivered after launch.

SIGNAL IT WORKS Two gatekeepers reviewing the same project reach similar scores, and can explain why when they do not.

BUILDING BLOCK 3 OF 5

Decision rights

Gatekeepers who can commit

A gate is only as strong as its owners. Gatekeepers must be able to commit the budget and people the next stage needs.

DESIGN CHOICES

- Gatekeepers are budget holders and functional heads.
- Seniority rises with the stakes of each gate.
- Deliverables sent days before the gate, and read.
- Decisions taken in the room, shared the same day.

	Team	Gate-keepers	PMO
Prepare deliverables	A	I	C
Score criteria	C	R	I
Decide	I	A	C
Commit resources	I	A	C
Record and follow up	I	I	A

R responsible · A accountable · C consulted · I informed

Example split of roles at a gate

WHAT TO BUILD

01
A gatekeeper charter
Who sits at each gate, who has the final word, and what makes a quorum.

02
Rules of engagement
Attend, read in advance, decide in the room, then support the decision.

03
A gate calendar
Fixed review slots, so teams plan to a date rather than wait for an agenda.

04
Delegation rules
Which decisions a portfolio manager can take between two gates.

HOW TO SPEED UP WITHOUT WEAKENING CONTROL

- **Protect gatekeepers' time.** Short, standard deliverables; questions sent before the meeting.
- **No delegates without authority.** Whoever attends in someone's place must be able to commit resources.
- **Make conditions explicit.** Each condition of a Go has an owner and a due date.

SIGNAL IT WORKS Every gate ends with a recorded decision, and the team knows the outcome before it leaves the room.

BUILDING BLOCK 4 OF 5

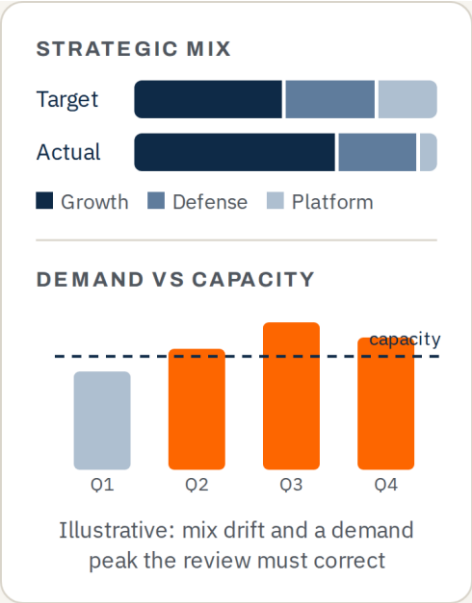
Portfolio link

Gates judge projects, reviews judge the whole

Without a portfolio view, every project can pass its gate while the pipeline as a whole still fails.

DESIGN CHOICES

- A quarterly portfolio review, separate from gates.
- Strategic buckets: growth, defense, platform.
- A capacity check against named skills before every Go.
- Balance by stage, so the funnel neither empties nor clogs.



Illustrative: mix drift and a demand peak the review must correct

WHAT TO BUILD

01 **Strategic buckets** Target investment shares agreed with leadership once a year.	02 **A ranked pipeline** All active and candidate projects in one list, ranked by score and fit.
03 **A capacity model** Demand from every project against the real availability of key skills.	04 **A pipeline health view** Projects by stage and by bucket, updated continuously.

HOW TO REBALANCE WITHOUT RE-DECIDING EVERYTHING

- **Gates decide, reviews rebalance.** The portfolio review changes priorities, not individual gate outcomes.
- **Use Hold deliberately.** Good projects can wait for capacity without being killed.
- **Stop something to start something.** A new Go when capacity is full names what slows down or stops.

SIGNAL IT WORKS The number of active projects matches the people available, and the mix matches the strategy.

BUILDING BLOCK 5 OF 5

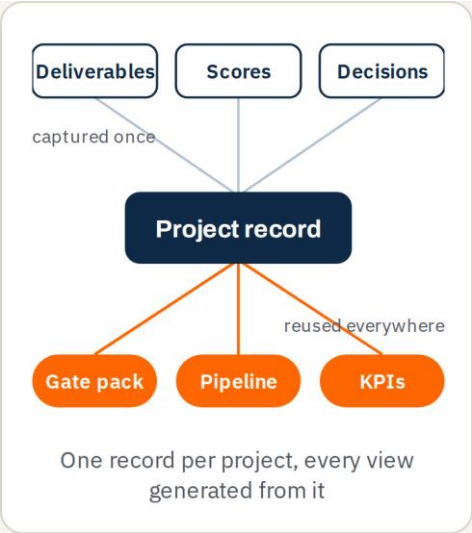
Industrialize

From meetings to a system

The process runs on shared data, not on the goodwill of the PMO. Deliverables, scores and decisions live in one place.

DESIGN CHOICES

- One record per project, from idea to post-launch review.
- Deliverables and checklists attached to the gate.
- Scores and decisions captured once, reused everywhere.
- Dashboards generated live, never compiled by hand.



WHAT TO BUILD

01 **A gate workflow** Gates scheduled, deliverables requested and gatekeepers notified automatically.	02 **Structured deliverables** Business case, risk and plan data held as fields, not only as attached files.
03 **Gate history** Every past decision, score and condition visible on the project.	04 **Live dashboards** Pipeline, gate outcomes and portfolio indicators for every audience.

HOW TO DIGITIZE WITHOUT ADDING WORKLOAD

- **Start with the gate.** Digitize deliverables and decisions first; add lifecycle detail later.
- **Retire the parallel spreadsheet.** Once the platform is live, gates use only the platform.
- **Enter data once.** If a project leader has to type the same figure twice, the design is wrong.

SIGNAL IT WORKS Gate packs come out of the platform in minutes, and no one asks for the latest version.

MEASURE THE GOVERNANCE

Measure the governance itself

Most NPD dashboards track projects. Few track the gate process. Six indicators show whether your gates are selecting projects or just holding meetings.

Review them each quarter in the portfolio review. Trends matter more than absolute values, and each indicator should be read against the others.

1

Gate cycle time

Time from deliverables submitted to decision communicated. When it rises, gridlock is building.

2

Stop rate by gate

Share of projects stopped at each gate. A healthy funnel stops more projects early and few late.

3

On-time gate arrival

Share of projects reaching their gate on the planned date. It tests how credible plans are.

4

Demand vs capacity

Demand on key skills against availability. Above capacity, every project slows down.

5

Strategic mix

Actual investment by bucket against target. Drift means priorities are being set by default.

6

Business-case accuracy

Benefits delivered compared with those promised, measured at the post-launch review.

THE HONEST FUNNEL

If almost nothing stops at early gates while projects still fail late, your gates are approving, not selecting.

GETTING STARTED

A 90-day rollout plan

Modernizing gate governance does not need a multi-year program. It needs one pilot portfolio, a clear sequence and visible results.



Days 1–30 Design	Days 31–60 Pilot	Days 61–90 Scale
▪ Map current gates and last year's decisions. ▪ Define tracks, criteria and gatekeepers. ▪ Agree what go, kill, hold and recycle mean.	▪ Run real gates for one portfolio on the platform. ▪ Score independently, decide in the room. ▪ Collect feedback from teams and gatekeepers.	▪ Adjust criteria and deliverables from the pilot. ▪ Extend to the next portfolio. ▪ Hold the first quarterly portfolio review.

MILESTONES TO SHOW LEADERSHIP

Day 30 One page of gate rules, approved by leadership.

Day 60 First decisions recorded on the platform, including at least one hold or kill.

Day 90 A live pipeline dashboard used in the portfolio review.

THREE PITFALLS TO AVOID

Perfect process first
Months of design before any real gate. Teams lose interest before the first decision.

Everywhere at once
A big-bang launch across all portfolios leaves no time to learn and adjust.

The spare spreadsheet
Keeping the old file "just in case" guarantees two versions of the truth.

Pick a pilot portfolio with a willing leader and a gate coming up soon. Real decisions convince faster than any process design.

SELF-ASSESSMENT

How strong are your gates today?

Tick each statement that is true for your organization today. The five groups follow the five building blocks. Run it with product leaders, the PMO and two or three gatekeepers; it takes under an hour.

1
Scale to risk

- ☐ Each project is routed to a track by risk and investment.
- ☐ Every gate has defined deliverables for each track.
- ☐ Gates end with go, kill, hold or recycle, never “noted”.

2
Scorecards

- ☐ Must-meet and should-meet criteria are defined and shared.
- ☐ Gatekeepers score independently before the meeting.
- ☐ Decisions and their reasons are recorded.

3
Decision rights

- ☐ Gatekeepers can commit the resources they approve.
- ☐ Gates follow a fixed calendar.
- ☐ Teams learn the decision on the day of the gate.

4
Portfolio link

- ☐ A portfolio review runs at least every quarter.
- ☐ Every Go is checked against available capacity.
- ☐ Investment is tracked by strategic bucket.

5
Industrialize

- ☐ Deliverables, scores and decisions live in one system.
- ☐ Pipeline dashboards are generated, not compiled.
- ☐ Stop rate and gate cycle time are tracked.

Reading your result

Count the ticks in each block. Any block with one tick or none is your first priority.

Different answers from different people are a finding in themselves: they show where governance is not yet shared.

HOW PPM-FACTORY HELPS

Stage gate governance, ready to run

PPM-Factory helps product, R&D and portfolio leaders across DACH and Italy industrialize new product development. Its NPD solution supports each building block of this playbook.

1 · Scale to risk	NPD portfolios and projects with a configurable lifecycle and gates.
2 · Scorecards	Request scoring on business, technical, financial and risk; gate assessments of quality, alignment and action plan.
3 · Decision rights	Gate decisions recorded on the gate, with the full history on the project.
4 · Portfolio link	Strategic rationale per project, budgeted, planned and actual costs, and resource capacity.
5 · Industrialize	Portfolio and project KPI dashboards generated from live data.

PPM-Factory Ready

Pre-packaged NPD governance: lifecycle, gates, scorecards and dashboards.

BEST FIT

Replacing slide-and-spreadsheet gates quickly, starting with one pilot portfolio.

PPM-Factory Adapt

Configured to your tracks, criteria and decision rights.

BEST FIT

Multi-division pipelines with their own routing, capacity and finance rules.

NEXT STEPS

1. **Assess.** Run the self-assessment with your gatekeepers.
2. **Focus.** Pick the building block with the fewest ticks.
3. **Pilot.** Talk to PPM-Factory about a 90-day pilot on one portfolio.

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