

# Gatekeeping for Capital Project Governance

A stage-gate process is a key element of capital investment decision-making, but weak gates undermine the objective. How effective is your process?

## COURSE SUMMARY

The stage-gate process has the dual role of being a method for shaping business opportunity into a capital project that maximizes return-on-investment and a tool for corporate governance of capital investment. Yet the stage-gate processes of many companies do not function effectively, often due to the following:

- Lack of understanding of how the stage-gate process improves capital investment decision-making
- Investment analysis based on information that is biased or does not incorporate the true range of risk
- Weak gates that allow projects to proceed with marginal business justification or poor quality stage-gate deliverables

This virtual training course provides participants with a set of gatekeeping practices and tools that help improve project effectiveness, as identified through IPA research. Participants will learn why these practices are important and how to implement them effectively in capital projects.

## FORMAT AND STRUCTURE

This is an online, instructor-led course delivered via WebEx Training Center in three separate 2-hour sessions (see below for available dates and times). Participation in all sessions is required for course completion. Each session is presented live with interactive class exercises and discussions. The topics covered in each session are listed on the next page.

## AVAILABLE DATE & TIME

| Date            | Time                                     | Language | Fee       | Click to Register        |
|-----------------|--|----------|-----------|--------------------------|
| June 27–29      | 9 a.m. to 11 a.m.<br>(U.S. Eastern Time) | English  | \$600 USD | <a href="#">REGISTER</a> |
| September 12–14 | 9 a.m. to 11 a.m.<br>(U.S. Eastern Time) | English  | \$600 USD | <a href="#">REGISTER</a> |
| November 7–9    | 9 a.m. to 11 a.m.<br>(U.S. Eastern Time) | English  | \$600 USD | <a href="#">REGISTER</a> |



## KEY BENEFITS

**Understand** common gatekeeping organization structures and key players in the process

**Learn** basic gatekeeping concepts, including the objectives and goals for stage gates during Front-End Loading (FEL), and the key decisions that must be made

**Recognize** how instrumental business involvement is to effective application of the stage-gated process

**Gain** knowledge of the information required to select and shape the most effective use of capital at each gate

**Review** assurance methods to evaluate the quality of stage-gate deliverables and identify vulnerabilities

## REQUEST INFO

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## COURSE TOPICS

|                  |  |
|------------------|--|
| <b>Session 1</b> | Introduction to Front-End Loading and Measuring Capital Effectiveness<br><br>Gatekeeping Roles and Processes |
| <b>Session 2</b> | Business Case Development for FEL 1 and FEL 2<br><br>Investment Committee Decision Making                    |
| <b>Session 3</b> | The Role and Limitations of Project Assurance  |

## WHO SHOULD ATTEND?

This seminar is designed for participants who are or will be involved in the implementation, execution, and/or optimization of a gatekeeping process.

## COURSE BACKGROUND

All course instruction, presentations, and supplementary course materials are rooted in IPA's decades of experience evaluating project and project systems and conducting quantitative research into capital project issues and trends. IPA maintains a proprietary database with information on thousands of projects on which to base its analyses and studies.

**Why the IPA Institute?** The IPA Institute is the training and education division of Independent Project Analysis (IPA), the world's leading advisory firm on capital projects. Our courses equip industry leaders and capital project practitioners with Best Practices for projects, portfolio, and project system management/delivery. All course instruction, presentations, and supplementary course materials are rooted in IPA's unparalleled capital project knowledge. 2023 © Independent Project Analysis, Inc. *Excellence Through Measurement™*

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