

Traffic Safety and Security Division

Project Gate Review Template



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Comp

Instructions: (Remove this slide prior to gate review)

All text in **Blue** will need to be modified or examples removed. Change text color to **Black** when you have filled in your project specific detail. (No blue text should remain for your presentation).

The footers in some of the slides have additional instructions. Please remove these guidelines prior to your presentation.

The Appendix covers the Big Questions for each phase. Use the appropriate slide to add to your presentation.

Project Title

Date

Gate Review from [Current Phase] to [Next Phase]



Agenda

1. Executive Summary
2. Big Questions
3. Phase Deliverables (Change Deliverable names below to represent current phase)
 - Release Notes
 - Service Readiness
 - UAT Results
 - Test Closure Memo
4. Project Milestone Schedule Assessment
5. Project Finance Update
6. Top 5 Risks & Mitigation Plan
7. Gatekeeper Feedback

Executive Summary (Keep to 1 page)

Program Description:

- Short description of program

Scope:

- 1-2 sentences or bullets of what's in & out of scope

Program Schedule:

- Program start: Month / Year
- Release date(s): Month / Year

Earn Value Metric:

- CPI = X & SPI = X
- ETC: XXXXXX

Budget Summary:

- Current Contract Amt (including COs) v Revenue recognized: X vs X
- Gross Margin/OI: X/X

Project Resourcing (Current & Next Phase):

- X TLs, X SDs, X QAs, X Infra, X PMs, X QMs, X other roles
- Total Hrs Burned/Past Month:

Recommended Gate Disposition: Green / Yellow / Red



Proposal & Contract / Initiate & Plan / Execute / Transition / Service & Support Phase Big Questions

- Copy the Big Questions for the appropriate phase from the Appendix and attach here.
- Answer these questions within this slide or on the subsequent slide.

Proposal & Contract / Initiate & Plan / Execute / Transition / Service & Support

Phase Big Questions

- Continued from the previous slide (if needed)

Takeaway statement (1 line max, never cover copyright or Company logo)

Project Team (List Team Members on the Project)

Name	Role	Planned Hrs	Actual Hrs	Validated by Resource Mgr - Y/N	Validated by PM - Y/N

This slide answers the big question:

- What is your resource utilization per role, per resource (against plan)?



Proposal & Contract / Initiate & Plan / Execute / Transition / Service & Support QM Scorecard

- Insert Relevant Section from the QM Scorecard with color codes completed on each Deliverable.

Accessing Server: Apps207

UK-WE-HO-AF-PRJ-01 - Customer XYZ **Proposal & Contract Phase** Status: **Not Started**
 0 / 0

Gate Review:

05/29/2015 16

Fill Gate Review with date of last approval

NPP Project Name:		2015				2016				2017				2018			
Big Business Priority:		Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Idea																	
Concept																	
3M Targeted Market Opportunity:																	
Feasibility																	
Development																	
Scale Up																	
Launch																	
3rd Year Sales Forecast:																	
Post-Launch																	

NPI Only

Team Leader / DBB

Gate Keepers

Deliverables	Refresh Tool Scores	Confidence	Performance	Overall
1. Contract Management	Open Deliverable Tools	0	0	<input type="checkbox"/>
2. Optional Deliverables	Open Deliverable Tools	0	0	<input type="checkbox"/>

Best practice tip: Score the EHS&R Deliverable using Compliance Questions in place of color scoring (Green-Yellow-Red).

Approval to Proceed: Yes

Overall Phase Recommendation is **Green / Yellow / Red**



Project Milestone Schedule Assessment

Expand on the Executive Summary project plan and provide a more extensive overview of your project; listing out all the future phase gates and key milestones for your project. Include planned vs actual targets, variance, ETC.

You can use any time line tool you want to represent your project (e.g. MS Project, PPM etc.).

1 slide for project timeline

Project Finance Update (CPI)

Program Name							
Revenue Recognition Method: Completed Contract							
November P&L		Project-to-Date Month Year to Month Year		Remaining Budget		Total Project Project End Date	
Domestic Sales		Domestic Sales		Domestic Sales		Domestic Sales	
Net Sales	\$ -	Net Sales	\$ -	Net Sales	\$ -	Net Sales	\$ -
Labor		Labor		Labor	-	Labor	
Travel		Travel		Travel	-	Travel	
Equipment		Equipment		Equipment	-	Equipment	
Subcontractors		Subcontractors		Subcontractors	-	Subcontractors	
Other		Other		Other	-	Other	
Net Factory Cost	\$ -	Net Factory Cost	\$ -	Net Factory Cost	\$ -	Net Factory Cost	\$ -
% to Sales	(100.0%)	% to Sales	#DIV/0!	% to Sales	(100.0%)	% to Sales	#DIV/0!
Freight and Drayage	-	Freight and Drayage	-	Freight and Drayage	-	Freight and Drayage	-
Expensed Engineering	-	Expensed Engineering	-	Expensed Engineering	-	Expensed Engineering	-
Cost of Goods Sold	\$ -	Cost of Goods Sold	\$ -	Cost of Goods Sold	\$ -	Cost of Goods Sold	\$ -
% to Sales	(100.0%)	% to Sales	#DIV/0!	% to Sales	(100.0%)	% to Sales	#DIV/0!
Gross Margin	\$ -	Gross Margin	\$ -	Gross Margin	\$ -	Gross Margin	\$ -
Gross Margin %	n/a	Gross Margin %	#DIV/0!	Gross Margin %	n/a	Gross Margin %	#DIV/0!
RDSG&A	\$ -	RDSG&A		RDSG&A	\$ -	RDSG&A	\$ -
% to Sales		% to Sales		% to Sales		% to Sales	
Operating Income		Operating Income	\$ -	Operating Income	\$ -	Operating Income	\$ -
% to Sales		% to Sales	#DIV/0!	% to Sales	n/a	% to Sales	#DIV/0!



Top 5 Risks & Mitigation Plan

Risk Description	Probability (%)	Impact (H,M,L)	Mitigation Plan



Decisions Needed

Cover items such as:

- Items related to your project where you want a decision from gatekeepers.
- Approval to move to next phase

Note: If there is any big surprise (i.e. the project is losing money, etc.), inform the gatekeepers prior to the gate review.

Takeaway statement (1 line max, never cover copyright or Company logo)



Thank You



Appendix

- Big Questions for Each Phase
- Criteria for Determining Program/Project Status Color Indicator

Typical Big Questions for Proposal & Contract Phase

- Was the executive briefing approved by leadership?
- Was the contract summary clear & articulated the key milestones and terms?
- How will the infrastructure need to be changed to accommodate this contract?
- Have project risks been identified and mitigation plans put in place?
- Is a NPI project required? Will this project be completed in the time required?

Typical Big Questions for Initiate/Plan Phase

- What is the level of team confidence in the clarity of defined scope?
- Does the resource plan support the scope of work?
- What is your resource utilization per role, per resource (against plan)?
- Was a team kickoff meeting held with customer/with internal team?
- Are team expectations clearly set about how the project will be governed, reporting (time & status) will be done, and change requests handled?
- Did you have a structured walkthrough of the business requirements with the customer & core project team including Solution Development (SD) and Quality Assurance (QA)?
- How do you plan to trace the requirements identified by the customer?

Typical Big Questions for Execute Phase

- Are all deliverables/milestone in Execute phase completed and approved by internal approvers & customer?
- If the scheduled work is behind, what actions are necessary to catch back up, and at what estimated cost/impact?
- If the schedule is ahead, why it's ahead, and at what cost/impact?
- Were there any architectural changes between Initiate/Plan and Execute? If yes, have the changes been understood by all stakeholders?
- What is the status of defects? What is mitigation strategy?
- What is your level of confidence in our ability to go live as scheduled?
- Has Service and Support or other downstream teams been engaged in preparation for Transition?
- What is your resource utilization per role, per resource (against plan)?

Typical Big Questions for Transition Phase

- What is the defect status? What is the mitigation strategy?
- Has the support team understood their obligation and accepted?
- Are training plans executed upon as agreed with customer (if required by contract)?
- Is the resource plan & schedule in place to transition to support team?
- Do we have final acceptance from the customer?
- What is your resource utilization per role, per resource (against plan)?

Typical Big Questions for Service & Support Phase

- 6 months after final acceptance, the support team is expected to provide an update on these questions.
 - How satisfied is the customer regarding support?
 - Were we able to execute defect mitigation strategy as planned? Were new defects identified that were not anticipated?
 - How are we performing against contractually obligated KPIs & SLAs?

Criteria for Determining Program/Project Status Color Indicator

Criteria for Determining Program/Project Status Color Indicator		
Color Status		Qualitative Criteria
Green	Schedule	In general, the project is largely on track to deliver scope by committed deadline with committed resources/funding.
	Budget	
	Risk	No risks impacting project performance. Project is well controlled.
	Resources	Some issues identified but effective actions are planned for solving them.
Yellow	Schedule	In general, the project is not on track to deliver scope by the committed deadline with committed resources/funding, BUT there is a plan for course correction.
	Budget	
	Risk	Low impacting risks & issues that need management attention but controllable at the moment.
	Resources	
Red	Schedule	In general, the project is not on track and there is no plan to get back to green.
	Budget	
	Risk	High impacting risk or issue that will impact cost and/or schedule.
	Resources	

