

Stage Gate Playbook

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TABLE OF CONTENTS

3	What A Stage Gate Is	11	Digital Stage Gate Overview
4	Why A Stage Gate Approach Is Important	12	Defining Concepts And Solutions
5	What The Stage Gate Playbook Is	13	Stage 1: Problem Identification
6	How To Use This Playbook	16	Stage 2: Concept Development
7	What You'll Find In This Playbook	19	Stage 3: Solution Development
8	How We've Defined Innovation	22	Stage 4: Pilot
9	Stage Gate Terminology	25	Gate Meeting Governance
		30	Stage Gate Ambassadors

WHAT A STAGE GATE IS

Stage Gate is an innovation approach where initiatives are divided into distinct **stages**, separated by decision meetings that are called **gates**.

Stages are the time in which activities take place. **Gates** are the meetings where decisions are made by a steering committee (not status updates).

The purpose of using a **Stage Gate** is to allow teams to explore solutions to problems that matter to fans, with regular leadership check-points to ensure that teams are on track and that solutions are make sense for the business and for fans.

WHY A STAGE GATE APPROACH IS IMPORTANT

This Stage Gate approach allows us to do that assessment at specific touch-points, and make informed decisions about where to invest resources.

Our goal is to only move ideas forward that meet the success criteria specific to each initiative, and that have the greatest chance for success. To measure the success of our innovative ideas, we must gauge the **desirability, feasibility and viability** of each initiative.

WHAT THIS STAGE GATE PLAYBOOK IS

This Stage Gate Playbook is a reference to guide you through a **repeatable end to end innovation approach**.

As you work to deliver innovation initiatives, use the Playbook as a tool to clarify the what, when and how of innovation.

HOW TO USE THIS PLAYBOOK

Use this Playbook as a guide to help you think about what you'll need to do to take innovation initiatives from early stage problem identification through concept creation, initial development and piloting.

- As you identify fan problems to solve, use the Playbook to help you understand how projects will move through the stages
- Get familiar with the stage intents, outcomes, activities and questions, and use them as a guide for planning resources and scheduling
- Use the activities for each stage as a guide, not a check list
- Use the gate questions to inform the work you do - activities should help answer these questions
- Understand how and when to bring projects to gate meetings
- Ask Brian Huss or Dennis Lee for guidance!

WHAT YOU'LL FIND IN THIS PLAYBOOK

Within the framework of this Playbook are the elements needed to define, prioritize, and deliver innovative initiatives throughout cross-functional teams.

- The elements of the Stage Gate approach to innovation
- What a Stage Gate approach is
- The intents and outcomes of each stage
- High-level activities that should be considered during each stage
- Questions to be answered within each stage that allow for decisions to be made about transition into the subsequent stage
- Consistent governance routines for the team as it applies to this approach

HOW WE'VE DEFINED INNOVATION

Building the future by finding and solving problems that matter to fans, experimenting without fear or constraint.

Stage Gate Terminology

This is terminology that will be used repeatedly within this document. These definitions will help clarify how these terms are used in context.

Stage activities are the tasks that should be considered to fulfill the corresponding stage.

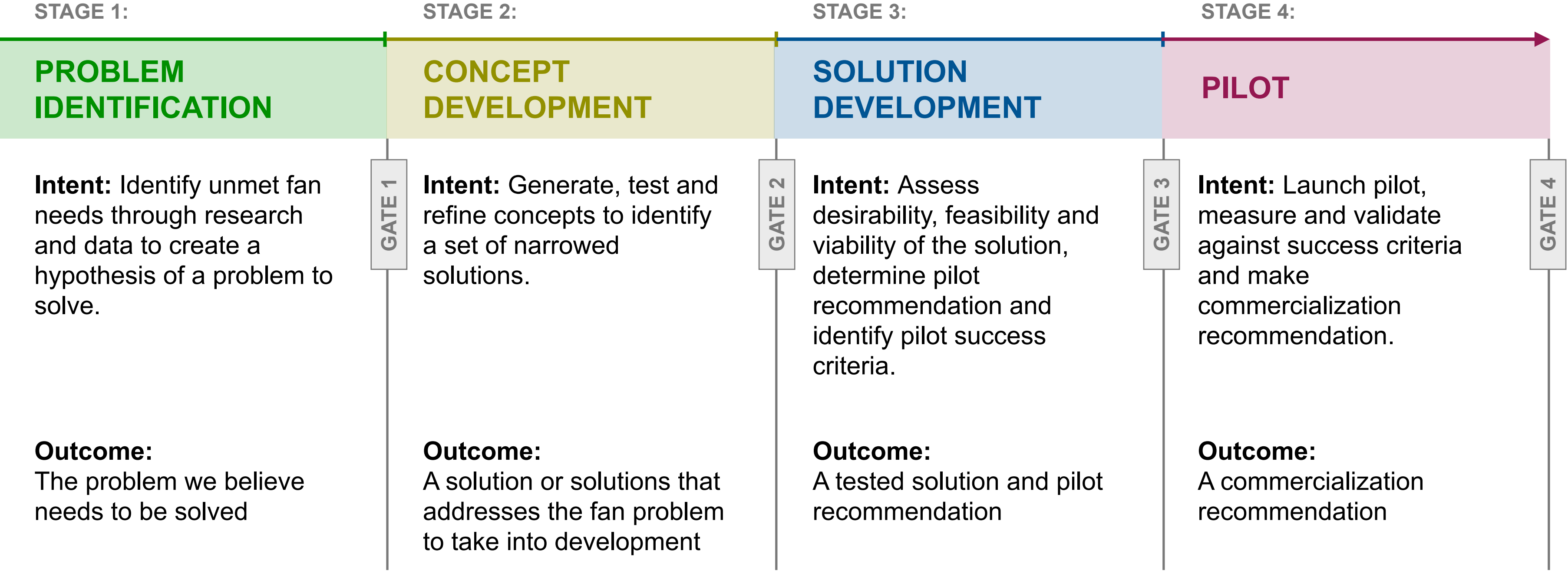
The **Gate Meeting** is a check-point where decisions are made about how to proceed with the initiative, based on the success criteria set for each stage (not a status update or project read-out).

Gatekeepers are the cross functional governance team who are responsible for final decisions in the gate meetings.

Gate Questions are pre-determined questions used to determine the path forward for initiatives, and to consider prior to transitioning into the next stage of the approach.

The Stage Gate Approach

Digital Stage Gate Overview



There is a 5th stage, Commercialization, which is currently being managed through existing processes. This document does not address that stage. Contact Dennis Lee for information specific to Commercialization.

Defining Concepts and Solutions

These definitions serve to clarify these two terms in context within this playbook.

Concepts (Stage 2)

The initial ideas that solve fan problems, and are generally only represented through descriptions or low- to medium-fidelity prototypes. Concepts are usually tested with fans, and may be used for initial feasibility and viability assessments. Concepts will be used to inspire solutions in Stage 3.

Solutions (Stage 3)

The working products that are based on concepts created during Stage 2. During solution development, teams should be looking for market and operational issues that could derail a product during a pilot. Solutions should function correctly, but may require additional development for commercialization.

STAGE 1:
PROBLEM IDENTIFICATION

Identify unmet fan needs through research and data to create a hypothesis of a problem to solve.

STAGE 1: PROBLEM IDENTIFICATION

Intent:

Identify unmet fan needs through research and data to create a hypothesis of a problem to solve.

Outcome:

The problem we believe needs to be solved

Stage Activities

- Talk to fans (internal and external)
- Sourcing / collecting data
- Review qualitative and quant Insights
- Identify fan segment
- Develop problem hypothesis
- Competitive analysis / assessment
- Identify alignment to business values and philosophy
- Evaluate hypothesis
- Evaluate and identify resources, unknowns, risks, and dependencies.
- Develop Gate recommendation

STAGE 1: PROBLEM IDENTIFICATION

Intent:

Identify unmet fan needs through research and data to create a hypothesis of a problem to solve.

Outcome:

The problem we believe needs to be solved

Gate Questions

- What type of current or potential fan are we solving for?
- What problem are we solving, and is it worth solving?
- How did we know this was a problem to be solved? Did we determine this through research? Are there competitive / complementary products that inform us?
- How does this work connect to our business philosophy / values
- What is our hypothesis around the problem?
- What are the:
 - Unknowns
 - Resources
 - Risks
 - Dependencies

STAGE 2:
CONCEPT DEVELOPMENT

Generate, test and refine concepts to identify a set of narrowed solutions.

STAGE 2: CONCEPT DEVELOPMENT

Intent:

Generate, test and refine concepts to identify a set of narrowed solutions.

Outcome:

A solution or solutions that addresses the fan problem to take into development

Stage Activities

- Brainstorming and concept generation
- Competitive research to understand solution landscape
- Concept validation
- Identify risks and dependencies
- Refine concept and re-validate
- Narrow concepts
- Refine concept and test hypothesis, confirming if the solution addresses the initial problem
- Identify unknowns
- Identify resources needed in the next Stage
- Develop Gate recommendation

STAGE 2: CONCEPT DEVELOPMENT

Intent:

Generate, test and refine concepts to identify a set of narrowed solutions.

Outcome:

A solution or solutions that addresses the fan problem to take into development

Gate Questions

- Did we address / solve the problem identified in Stage 1?
- What concept exploration and validation did we do?
- How does the solution connect to business strategies or philosophies?
- What are the success criteria used to measure the solution? What are the impact to effort measures?
- Is this something we should do?
- What are the:
 - Unknowns
 - Resources
 - Risks
 - Dependencies

STAGE 3:
SOLUTION DEVELOPMENT

Assess desirability, feasibility and viability of the solution, determine pilot recommendation and identify pilot success criteria.

STAGE 3: SOLUTION DEVELOPMENT

Intent:

Assess desirability, feasibility and viability of the solution, determine pilot recommendation and identify pilot success criteria.

Outcome:

A tested solution and pilot recommendation

Stage Activities

- Create research stimulus
- Do fan research on the solution
- Cross-functional overview / intro to concept
- Define / document criteria for solution selection
- Develop product brief
- Determine pilot scope
- Identify and engage resources needed for pilot
- Secure budget
- Review internal tech (buy / build assessment)
- Assess tech impact for pilot
- Consult with research and analytics team to define success metrics and key learning plan
- Create initial business justification and impact
- Identify pilot market(s), develop awareness strategy
- Plan to mitigate resolve risks and dependencies
- Develop Gate recommendation

STAGE 3: SOLUTION DEVELOPMENT

Intent:

Assess desirability, feasibility and viability of the solution, determine pilot recommendation and identify pilot success criteria.

Outcome:

A tested solution and pilot recommendation

Gate Questions

Solution

- What is the solution?
- Why was it selected?
- Is the solution desirable, viable, and feasible?
- What is the technical work to move to pilot?
- Are there internal technologies available?

Pilot planning

- What is our pilot and learning plan moving forward?
- Who is the audience?
- What is the length of pilot?
- What are our success metrics?
- What is the business impact (hypothesis)?
- What are the:
 - Unknowns
 - Resources
 - Risks
 - Dependencies

STAGE 4:
PILOT

Launch pilot, measure and validate against success criteria and make commercialization recommendation.

STAGE 4: PILOT

Intent:

Launch pilot, measure and validate against success criteria and make commercialization recommendation.

Outcome:

A commercialization recommendation

Stage Activities

- Build the pilot
- Launch the pilot
- Assess pilot against metrics (pass/fail)
- Revisit pilot activities and adjust as needed
- Identify go-to-market strategy
- Identify and assess changes needed for commercialization
- Buy vs build assessment
- Develop business plan (financials, KPIs, launch, etc)
- Communicate pilot results to the steering committee and align on desirability
- Develop commercialization recommendation. and timeline
- Align with Turner / League executive team
- Identify launch team
- Identify unknowns, risks and dependencies
- Develop Gate recommendation

STAGE 4: PILOT

Intent:

Launch pilot, measure and validate against success criteria and make commercialization recommendation.

Outcome:

A commercialization recommendation

Gate Questions

- Was the criteria for pilot success met?
- Have we validated desirability?
- What changes are needed to move to commercialization?
- What is our commercialization recommendation?
- Are there existing technologies that could support this solution? Have we looked both internally and externally?
- Recommendations around gate decisions and next steps
- Have we evaluated various levels of commercialization?
- Were new opportunities uncovered during the pilot?
- Did the pilot provide enough data to make a recommendation?
- Should we do this? Is there enough value to get in return for the investment?
- What are the implications (League, legal, rights)?
- What is the business plan?
- What are the:
 - Unknowns
 - Resources
 - Risks
 - Dependencies

Gate Meeting Governance

Gate Meetings

Each initiative will need to be presented at a Gate meeting, where teams will be asked to review what they have learned, and make recommendations to the gatekeepers regarding next steps.

1. Teams will present a high-level overview of the project:

- What Stage is the work in?
- What is the fan problem we are solving?
- What are the answers to the questions that are appropriate for that Stage?
- What is the team's recommendation regarding the Gate (Go / No-Go / Revisit / Hold)

2. Gatekeepers will ask clarifying questions and discuss the specifics of the initiative.

3. Teams will discuss barriers to success and resource needs.

- Gatekeepers are responsible for breaking down barriers and ensuring that resources are available for initiatives that are considered a "Go".

4. Gatekeepers will make the final Gate decisions.

5. Brian Huss or Dennis Lee will capture the decisions and update innovation portfolio information.

Gate Meeting Decisions

These terms serve as a structured way of providing clear answers regarding next steps for initiatives moving through the approach.

Go

The work is on-track, questions were answered sufficiently, move to the next Stage.

No-Go (Kill)

There doesn't appear to be enough evidence to move forward. Stop working, no more resources for the initiative.

Revisit

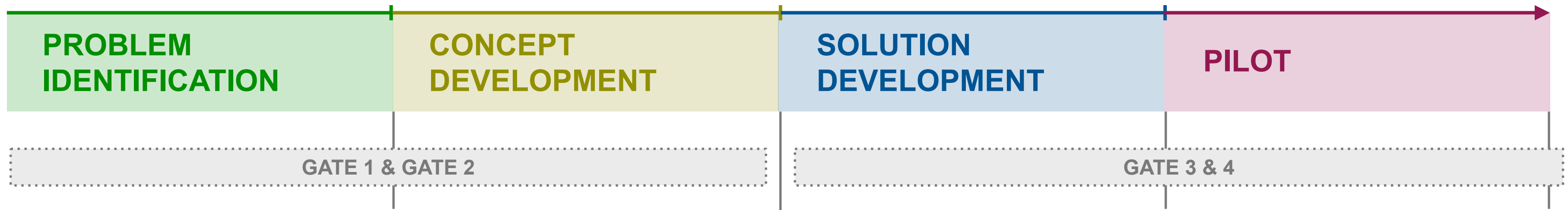
There are still unanswered questions or more work to be done. Stay in the current Stage and come back to the Gate later.

Hold

There's interest in the work, but it's not a priority for the moment. Capture any learnings, and hold off any more work for the time being. The initiative might be revived at a later date.

Gatekeepers

Gatekeepers assess initiatives, confirm if criteria has been met for that gate, and make the final gate decision regarding next steps for the initiative.



Gatekeepers:

- Mark Richards
- Yang Adija
- Jason Taylor

Additional Gatekeepers will be engaged by Brian Huss as appropriate depending on the project scope and subject. These gatekeepers may delegate as appropriate

Gatekeepers:

Full Steering Committee

Gate Meeting FAQs

When are gate meetings held?

Gate meetings coincide with Product Roadmap meetings. Gate meetings will only be scheduled when there are projects ready to be discussed with the gatekeepers. If there are no projects ready to come to the gate meeting, the gatekeepers will not meet.

How will I know when my initiative is ready to be presented at a gate meeting?

Teams should reach out to Brian Huss when they believe they have answered the questions posed during the stage, and feel they are ready to come to a Gate.

Brian will work with the team to make sure they have fully answered the gate questions and are ready to go to the gate meeting.

How do I get on the gate meeting calendar?

Brian will manage the calendar, and will work with teams to put them on the gate meeting schedule.

What do I need to do to prepare for the gate meeting?

Teams should submit pre-reads to Brian at least 2 business days before the gate meeting for review by the gatekeepers.