Pipeline Review Meeting

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| Attendees  (Sub) Portfolio Manager PMO / Portfolio Coordinator | General Info  Duration: 1 hour Leader: Portfolio Coordinator Cadence: Periodic/As Needed (before Portfolio Board Meeting if new initiatives are available) | Needed Before Meeting  List of New Project Initiatives |



Overall Meeting Objective  
To review and prioritize newly proposed project initiatives

Agenda

1. Introduction  
   Kick off the discussion with an overview of meeting objectives & the agenda.
2. Project Initiatives  
   Portfolio Coordinator presents all new project initiatives to attendees. In Meisterplan, the Portfolio Coordinator will display all projects in the Stage Gate “Seeking Review”.
3. Validation  
   Discuss the project criteria and strategic impact of each new project initiative.
4. Prioritization  
   Prioritize the new project initiatives against each other as well as against existing projects.
5. Stage Gate  
   Assign the necessary stages for each new project initiative.
6. Next Steps  
   Confirm next steps (e.g., prepare briefing and project overview with projects seeking approval) to ensure new project initiatives are ready for the Portfolio Board Meeting where it is decided which new projects will be implemented.