JUPITER PRIME
Consulting • Training • Advisory
جوبيتر برايم للاستشارات والتدريب

COURSE BROCHURE

# Capital Expenditure Gating and Post-Completion Review Training Course

17 – 21 January 2027
Muscat

**jupiterprime.uk**
info@jupiterprime.uk
Registered in the United Kingdom and Saudi Arabia

# Capital Expenditure Gating and Post-Completion Review Training Course

**Ref:** 2775_106228 **Date:** 17 – 21 January 2027 **Location:** Muscat **Fees:** 5500 GBP

Capital expenditure gating and post-completion review is a 1-week training course for capital planning managers, project controllers and asset owners, and each participant leaves with a capital spending control plan for a project portfolio. Boards now ask whether every approved project still earns its place once money is committed. Jupiter Prime Training runs this course on capital expenditure gating and post-completion review.

## Why Capital Expenditure Gating and Post-Completion Review Matters Now

Three forces shape capital allocation today. Higher financing costs make late assets expensive. Investors expect a visible link between strategy and approved projects. Asset owners inherit what project teams hand over for decades. An organisation that gates projects well stops weak cases early and learns from each completed asset; one that gates badly funds optimism and repeats the same estimating errors. The course rests on stage-gate approval, estimate classification and benefits realisation practice.

## Who Gains Most from Capital Expenditure Gating and Post-Completion Review

- Staff who assemble the annual capital plan and rank competing funding requests
- Controllers who track committed and actual spend against approved project envelopes
- Asset owners who accept completed facilities and carry their operating budgets
- Finance partners who test investment cases before they reach an approval committee
- Engineering leads who prepare estimates and schedules for gate submissions

A capital planning office sending planners, controllers and an asset owner together gains most, sharing one language for gate evidence.

## Capital Expenditure Gating and Post-Completion Review Capabilities

Participants practise turning a list of funding requests into a ranked, gated and monitored portfolio.

- Align each project request with a strategic objective and a capacity need — investment committee ranking
- Assess estimate maturity against the evidence expected at each gate — release of design funds
- Weigh risk-adjusted returns across competing projects — annual capital envelope
- Specify spend tracking measures and tolerance bands — controller escalation to sponsors
- Design a post-completion review that compares delivered benefits with the approved case — future estimating assumptions
- Build a capital spending control plan for a project portfolio — finance director and asset owners

## Key Capital Expenditure Gating and Post-Completion Review Terms

- Stage gate — a formal decision point where a project must show defined evidence before it receives funds for the next phase.
- Estimate class — a rating of how mature a cost estimate is, based on design definition.
- Capital envelope — the total amount of capital spending an organisation authorises for a period across all projects.
- Optimism bias — the tendency of project sponsors to understate cost and duration.
- Commitment tracking — monitoring of orders and contracts placed, not only invoices paid.
- Post-completion review — a structured look-back after handover comparing actual cost, schedule and benefits with the approved case.

## Capital Expenditure Gating and Post-Completion Review Day by Day

### Day 1: Strategy and the Capital Portfolio

- Strategic Objective Mapping — Linking Each Request to Board Priorities
- Capacity Gap Assessment — Distinguishing Growth, Renewal and Mandatory Spend
- Capital Envelope Setting — Balancing Funding Limits Against Pipeline Demand
- Portfolio Categories and Hurdle Rates — Matching Return Tests to Project Type
- Sponsor Accountability Charter — Naming Who Owns Each Investment Case

### Day 2: Gate Design and Evidence Standards

- Stage-Gate Sequence Design — Setting Decision Points From Idea to Handover
- Gate Evidence Checklists — Defining What Each Submission Must Prove
- Estimate Classification Matrix — Judging Cost Maturity Before Design Funds
- Optimism Bias Adjustments — Correcting Sponsor Estimates With Historical Uplifts
- Gatekeeper Roles and Delegations — Deciding Who Can Approve at Each Value

### Day 3: Ranking and Approval Decisions

- Risk-Adjusted Return Comparison — Choosing Between Projects Competing for Funds
- Multi-Criteria Scoring Grid — Valuing Safety, Reliability and Strategic Fit
- Deferral and Phasing Options — Sequencing Spend Within the Annual Envelope
- Investment Committee Paper — Presenting a Recommendation Members Can Test
- Recycle, Hold or Stop Rulings — Recording Why a Case Failed a Gate

### Day 4: Spend Tracking and Look-Back Reviews

- Commitment and Accrual Tracking — Seeing Spend Before Invoices Arrive
- Tolerance Bands and Escalation Triggers — Deciding When Sponsors Return to Committee
- Cash Phasing Forecasts — Aligning Project Spend With Treasury Funding
- Post-Completion Review Protocol — Comparing Delivered Benefits With the Approved Case
- Lessons Register and Estimating Feedback — Updating Assumptions for Future Gates

## Day 5: Practising the Capital Spending Control Plan

- Portfolio Ranking Rehearsal — Applying Scoring and Envelope Limits to a Case Set
- Mock Gate Review — Testing a Submission Against Evidence Checklists
- Tracking Dashboard Specification — Selecting Measures for Monthly Controller Reporting
- Look-Back Schedule Design — Timing Reviews After Handover and Stable Operation
- Capital Spending Control Plan — Completing the Portfolio Plan for Sign-Off

## Applying Capital Expenditure Gating and Post-Completion Review After the Course

- Run a mock gate review on one live project using the evidence checklist and record the ruling.
- Lead a post-completion review on a recently handed-over asset and feed variances into the lessons register.

## Capital Expenditure Gating and Post-Completion Review Questions FAQ

### What is capital expenditure gating and post-completion review, and why does it matter now?

It is the discipline of releasing capital in stages against evidence and then checking what each project delivered. Higher financing costs make weak approvals and unlearned lessons costly.

### Which roles gain most from capital expenditure gating and post-completion review?

Capital planners, project controllers, asset owners, finance partners and engineering leads gain most. Each touches a different gate and needs a shared method.

### How does a capital expenditure gating and post-completion review course differ from a project cost control course?

It looks at the portfolio and the approval decision rather than day-to-day cost control inside one project. You learn to rank, gate and review projects, while cost control courses focus on earned value and site-level budgets.

### What do you bring back from capital expenditure gating and post-completion review training?

You bring back a capital spending control plan for a portfolio of projects. It holds gate sequence, evidence checklists, ranking grid, tracking measures and a look-back schedule.

## Capital Expenditure Gating and Post-Completion Review: The Way Forward

The capital spending control plan first informs which requests enter next year's capital envelope and at which gate each one stands. Planners, controllers and asset owners use it as their common reference at committee. After its first look-back cycle, revisit the optimism adjustments and estimate classes, since real variances show where the original evidence standards were too generous.