

Plan the portfolio. Run every project. Keep what you learn.

CAP·PATH is the software your capital program runs on, from the five-year plan down to the person who owns one deliverable this week. The gated work process is its spine; around it sit the portfolio and its cash, the scoping requests, the governance forums and their gate decisions, the risk register, every open action, and the lessons. CAP·CORE is the standard it deploys.

- Own the standard. Run it in software.

— THE PROBLEM · WHERE MOST OWNER PROGRAMS ARE TODAY

The program is bigger than the project. Most software is not.

The capital plan lives in a spreadsheet, the gate process lives in a binder, the decisions live in minutes nobody reopens, and the lessons live in whoever happened to be there.

A PLAN NOBODY CAN DEFEND

A wish list with a total at the bottom

A STANDARD ON A SHELF

The gate process lives in a document, not in the work

GOVERNANCE WITHOUT A RECORD

Gates cleared in a room and lost in the minutes

LESSONS THAT EVAPORATE

The register opens at closeout, when memory is gone

PLAN THE PORTFOLIO · BEFORE ANY OF THIS · COVERED IN DEPTH ON THE CAPITAL PORTFOLIO ONE-PAGER

The capital plan, built as a model rather than a spreadsheet.

Every project at every site on one timeline, gate to gate, with the windows they ride. Cost by year with the funding split, cash by month from your own finance export, the standing obligations on a calendar, and candidates that earned their place through a scoping request. Your forecast imported as it stands.

01 BRING PROJECTS IN THE FRONT DOOR A project enters through a scoping request the disciplines review before anyone sees a row on the plan.

ONE-PAGE SCOPING REQUEST

Raised by anyone, reviewed by the disciplines

A PORTFOLIO DECISION, RECORDED

Accept, defer to a date, or decline with a reason

TIERED BEFORE IT IS DEPLOYED

Seven factors, one scored tier

02 RUN THE PROJECT The work process, deployed to a real project with a real team on it, and held to.

OWN THE STANDARD

The company standard, versioned and yours

DEPLOY BY TIER, ANCHORED TO THE GATES

Fewer steps as the tier falls, same process

COACHED ON THE STEP, ACCOUNTABLE AT THE CLOSE

The standard on the step, acceptance at the close

TWO LAMPS ON EVERY PROJECT

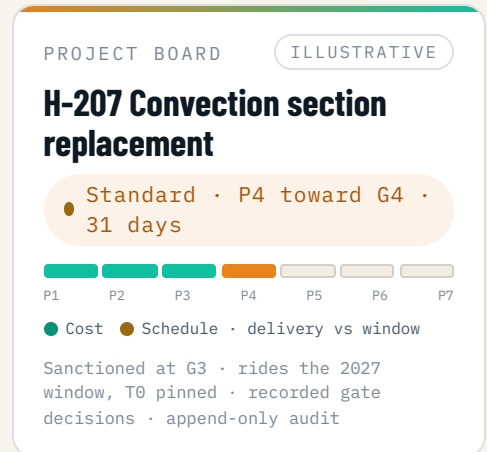
Cost and schedule, yellow or red, never silent

IMPROVE THE STANDARD

Drift, then promote it back into the standard

REPORT AND NOTIFY

Frozen reports, rollups, Excel, and email



03 GOVERN IT The forums that actually steer a capital program, run as a system rather than a calendar invite.

PORTFOLIO BODY, STEERING, GATE MEETINGS

Recurring series, live agenda, one opening ritual

MINUTES PEOPLE TRUST

Drafted from the room, confirmed by a person

THE GATE DECISION IS THE RECORD

Sponsor at G1 to G3, steering chair at G4 to G6

04 MANAGE WHAT THREATENS IT An evergreen register with the heartbeat enforced, contingency by estimate class, and cash forecast monthly.

YOUR MATRIX, YOUR LANGUAGE

Your own matrix, read in as it exists

THE HEARTBEAT IS THE PRODUCT

Review dates that force a decision, not a drift

CASH FORECAST, EVERY MONTH

Estimate at completion, cash by month, escalation

05 LEARN FROM IT The half of lessons learned that everybody skips: capture during, not after.

THIRTY SECONDS, FROM ANYWHERE

Capture in the flow, not at the closeout meeting

IT COMES BACK WHERE IT WAS LEARNED

Resurfaced on the activity that taught it

ACTIONS THAT LAND IN THE PLAN

One owner, a recorded re-date, an independent verify

06 RIDE THE TURNAROUND WINDOW Most capital at a running plant either rides a window or has to stay out of one. The link is a first-class object, not a note.

LINKED FROM EITHER SIDE

One record, two doors, one sign-in

PINNED, SO A MOVED WINDOW MOVES THE PROJECT

The scope freeze is the real deadline

ON THE SAME PORTFOLIO

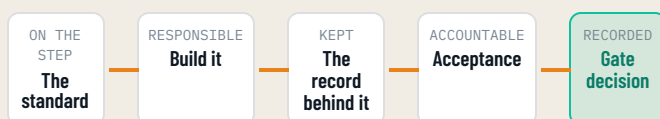
Windows and projects, stacked by year

— ASK THE PLATFORM

The standard, answering questions.

- **It cites the standard.** Every substantive answer names the governing document it came from, so the person can go and read it.
- **It reads your plan, not the template.** Dates, owners, and sequence come from your deployed project, drift included.
- **It coaches, it never decides.** It will not approve, score, gate, or judge readiness. Asked whether a package is good enough for sanction, it explains what the standard expects and points at the accountable approver by name.
- **It says when it does not know.** If the standard and the plan do not cover the question, it says so and points at who can answer, rather than inventing a requirement.

— THE ACCOUNTABILITY RAIL



The standard, what good looks like, and the due date sit **on the step itself**. The deliverable and its basis are kept as evidence, nothing closes without the accountable person's acceptance against its acceptance test, and a gate closes only through a recorded **proceed, recycle, hold, or cancel**. Every step lands in an append-only audit trail.

— THE STANDARD IT RUNS ON · CAP·CORE · YOU OWN IT, NOT A BLACK BOX

Major

ABOVE ABOUT \$20M

Every gate, full document set, independent review mandatory at sanction.

Standard

ABOUT \$5M TO \$20M

The full gate structure with condensed deliverables.

Small

UNDER ABOUT \$5M

Combined definition, weeks of front end, a desk review ahead of sanction.

RIK

LIKE FOR LIKE, ANY VALUE

One combined gate, standard templates, the change screen and the safety review never skipped.

CAP·CORE STANDARD

License the 47-standard management system and its tiered work process (156 activities at Major, 16 at RIK), tailored to your sites, funding sources, and approval ladder. Every requirement classed interlock, core, or stretch. The master ships in the tool, or import the gate process you already run.

CAP·CORE ADOPTION

A hands-on engagement to stand the system up and make it stick: load the portfolio, deploy the work process on the live projects, set the gate calendar and the accountability, seed the portfolio forum, and coach your people to run it without us.

Put your whole capital program in software you own.

We will stand up your standard in CAP·PATH, import your capital forecast, and walk your team through their first deployed project.

Book a walkthrough

capintelligence.ai

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