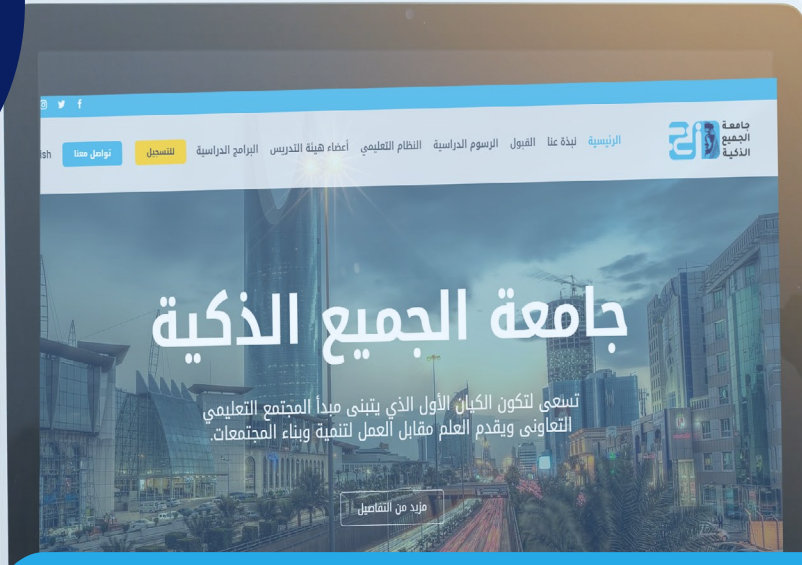


PART III :
Closing Phase



Project Closure



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In the previous lessons...

- The project life cycle includes the steps required for Project Managers to successfully manage a Project from start to finish. There are **5 phases to the Project Life Cycle** (also called the **5 Process Groups**)—Initiating, Planning, Executing, Monitoring/Controlling, and Closing. Each of these Project phases represents a group of interrelated processes that must take place:
- **The Initiating Phase**: consists of just two separate processes: the **Project charter** and **Stakeholder Register**. The point of this phase is to determine the **vision** for your Project, document what you hope to accomplish, and secure approvals from a sanctioning Stakeholder.

In the previous lessons...

- **The Planning Phase** process group is where you build the project infrastructure that will enable you to achieve your **Goal** within your predetermined time and budget constraints, starting with a **Project Management Plan**, **Project Scope**, **Work Breakdown Structure** and more—and wrapping up with qualitative and quantitative **Risk Analyses** and **Risk Responses**.
- **The Executing Phase** is where the rubber hits the road—where most of the **Budget** is allocated and most of the **Project Deliverables** are produced.
- You take your **Project Plan** and put it into action, whether that takes weeks, months, or even years.

In the previous lessons...

- **The Monitoring and Controlling Phase** involves keeping an eye on the actual progress of the project against your plan and taking corrective action where necessary. No amount of perfect planning will exempt you from the need to be constantly vigilant with tracking and reporting.
- We reach the last phase of the Project Life Cycle.....

Syllabus

I- What is the Project Closure?

II- The 3 phases of the Project Closure

III- The Project Closure Elements

IV- The Project Closure Objectives and Scope

V- Project Closure Best Practices

I- What Is Project Closure?

- Many practitioners overlook the **Project Closing** Process group.
To them, successful **Project Closing**, also called **Project Delivery**, is defined by the **completion of Deliverables** as per the Objectives of time and cost.
- Little do these practitioners know that the Project Closing Process Group is as impactful and significant as the Initiation, Planning, Executing, and Monitoring and Controlling Process Groups.
- As further explained in this lesson, the impact of Project Closing can be extensive, both to the Project and to the Organization.

I- What Is Project Closure?

I-1-Definition

According to A Guide To **The Project Management Body of Knowledge (PMBOK® Guide)** – Fifth Edition,

“The Project Closing Process Group consists of those processes performed to conclude all activities across all Project Management Process Groups to formally complete the project, phase, or contractual obligations.

This Process Group, when completed, verifies that the defined processes are completed within all of the Process Groups to close the Project or Phase, as appropriate, and formally establishes that the Project or Project Phase is complete” (2013, p. 57).

I- What Is Project Closure?

- Project closure defines a project's success.
- Project closure is the critical last phase in the project management lifecycle. During project closure, the team reviews the deliverables, then compares and tests its quality to the intended project outcome. Then they share the deliverables with the project's client.
- In other words, Project Closing is the combination of the following when applied to a project:

I- What Is Project Closure?

1. Assurance that all the work has been completed,
2. Assurance that all agreed upon project management processes have been executed, and
3. Formal recognition of the completion of a project—everyone agrees that it is completed.
4. Making sure all the work that needed to be has been done.
5. Obtaining approval by the project's sponsor and customer (whether internal or external) for the work completed.
6. Reviewing whether or not all organizational governance processes have been executed.

I- What Is Project Closure?

7. Assessing whether or not the necessary project management processes have been applied.
8. Administrative closing of any and all procurements, reviewing that all work on the contract has been completed and that both parties have completed their contractual obligations toward each other.
9. Formally recognizing the completion of a project and its transition to operations.
10. Validating that the project achieved benefits identified in the business case.

I- What Is Project Closure?

11. Capturing of lessons learned: What was done well, and should be documented so it can be repeated in the future? What could have been done better? And if so, how can it have been done better?
12. Disbanding project resources, freeing them to perform other projects and undertake other tasks as required within the organization.
13. Transitioning project deliverables to the customer organization in a manner that warrants seamless operations and support.

I- What Is Project Closure?

- A Project Manager will close a Project for many reasons.
- Those include completing a Project on time and finishing it early.
- Projects can also get cancelled or fail completely.

I- What Is Project Closure?

I-2-Why Is Project Closure Important?

- Just as any of the other project Life Cycle Phases (Initiation, Planning, Execution, Monitoring and Controlling), Project Closing serves an important purpose for the organization and helps it avoid unfavorable and adverse scenarios.
- Effective project closure helps define a team's and an organization's culture. Approaching project closure as fundamental to building success leads to better-quality work and makes clients happy.
- Learning is a critical outcome of project closure.
- The process sets the stage for more successful and satisfying projects in the future.

I- What Is Project Closure?

- It's essential to review what you've done and what you've learned.
- Determine how that learning could benefit the Team, so you don't limit the growth of each individual team member or the Organization as a whole.
- **Project Closure** is important because the process allows you to:

I- What Is Project Closure?

Tie Up Loose Ends:

- You've already delivered project outcomes to the client, but be sure to report all outcomes internally.
- Make sure all contracts are signed, paid, and finalized, and clean up your files.
- Ensure you've reviewed your progress and determined if you delivered the project on time and on budget.
- You'll also want to attend to logistics details, as well as relinquished physical space, digital equipment, and resources to responsible departments. These technical aspects of project closure allow you to close the project cleanly.

I- What Is Project Closure?

Take Stock of Lessons Learned:

- Take the time to have an open discussion about *lessons you learned* throughout the Project's Lifecycle.
- Make a **list**, a **Timeline**, or a **visual** that helps to spark ideas and refresh Team Members' memory of the Project from Initiation to the transfer to **Project Deliverables** to the **Client**.
- This Process should include a review of the **Project Budget** and actual expenses.
- Find tips on how to run a meeting on **Lessons Learned**.

I- What Is Project Closure?

Move On with a Clear Sense of Accomplishment:

When done well, project closure signals to each Team Member that the Project was meaningful and, simply, the job is complete.

- **Project Closure** provides a technical stoppage to any loose ends and enables you to inventory the **Lessons learned**.
- These steps also provide an **emotional Closure** for each Team Member, including the Project Manager.
- Focus on **individual and team learning processes**, and move on to the next great thing in store for each of you.
- Celebrate your team, too.

I- What Is Project Closure?

Archive the Project's Learning for the Benefit of the Team and Organization:

- The **final step in Project Closure** is to finalize the **Project Closure Report** and archive it so that it's accessible to all **Relevant Parties**.
- It's important to notify Team Members on where to find the Report for formal presentation to **Upper Management**.

I- What Is Project Closure?

I-3- What Happens if a Project Isn't Closed Properly

- When you don't properly close a Project, you lose the potential to learn from the current Project's Process and Outcomes.
- The next time you start a Project, you're more likely to encounter the same Issues and potentially less motivated Teams.
- When you don't close a Project correctly, Lessons aren't learned and Team contributions are not acknowledged and celebrated.
- Whether the Project is for an in-house audience or an outside organization, it's also possible that your client will be less satisfied with the Results.
- This is true regardless of how well it may meet Project Specifications and how timely your **Deliverables** reach the hands of your **Client**.

I- What Is Project Closure?

- **Failure** to conduct thorough **Project Close** out could potentially:
 - (a) put the organization at a considerable amount of **Risk**,
 - (b) prevent the organization from realizing the anticipated benefits from the deliverables of the project,
 - (c) result in significant losses to the organization, and
 - (d) undermine the project manager and project management team's credibility

II- The 3 Phases of the Project Closure Process

- The three phases of project closure are technical, learning, and people.
- During the technical phase, clean up loose ends. For the learning phase, evaluate what did and didn't work, as well as how to improve. In the people phase, appreciate team members.
- Take these steps during each phase of closing a project.
- By following this quick and easy guide to project closure steps and related activities, you're building a stronger future for yourself, your team, and your organization.

II- The 3 Phases of the Project Closure Process

II-1-Technical Phase

- The technical phase, while a bit on a bureaucratic side, creates a true sense of finality (and success) among the team and for the organization. A great project lifecycle enables you to do the following:

Tie Up Loose Ends

Make sure everything is in order (e.g., all vendors and workers are properly paid) and paperwork is complete.

Hold a Project Outcomes Meeting

Gather upper-level managers and supervisors and thank them for giving the project the green light. Use this time to report on the deliverables and summarize lessons learned, emphasizing the foundation laid for future successes for the organization as a result.

Show Appreciation for Supporting Departments

Give a hearty thanks to everyone who helped with the project. Report back on the successful closure of the project. For example, send a note saying you appreciated the space and resources allocated for this work and you've left it in good shape for the next team.

Create a Repository of Digital Project Resources

Make these materials available for future reference. If questions come up about this project or if a future project manager seeks to learn from your processes and successes, these documents will help.

II- The 3 Phases of the Project Closure Process

II-2-Learning Phase

- We want all projects to be both challenging and manageable, but sometimes not everything goes as planned. Occasionally you encounter a glitch along the way.
- No matter what happens during a project's lifecycle, learning is always present.
- The learning phase of project closure is time dedicated to team reflection on what you've done, how you've done it, and what you've learned now that the project is complete.

There are multiple ways to focus project closure on learning and growth, both for the organization as a whole and for individual team members. Doing so will likely lead to greater satisfaction and meaning associated with doing project work.

Dedicate Time for Team Reflection

Consider what you've done, how you've done it, and what you've learned now that the project is complete.

Document Lessons Learned

The learning phase brings lessons learned to the forefront and documents them for the benefit of your team today and for future reference when you or a colleague initiates a new project.

Respond to Questions about the Current Project

Now is the time to document organizational and project memory that's accessible to all relevant parties. One way to ensure you've addressed all issues is to respond to questions about the current project, then making that information accessible to all relevant parties.

Facilitate Discussion and Reflection in a Team Setting

The learning phase, just like the other phases, mostly involves holding team discussions about the project. Learning that takes place as a result of a team project helps to feed organizational success. Just as important, the project can inform individual team members' professional development and sense of mission.

II- The 3 Phases of the Project Closure Process

II-3- People Phase

- Take the time to commemorate what you've accomplished as a team. You've come to know the team well and have a good sense of the team's personality.
- Make the most of the camaraderie you've developed to celebrate in a way that's right for your team within your organization.
- Remember, the team made the project deliverables possible, and recognizing those efforts and the need for emotional closure will leave everyone feeling good and ready to move on, whatever comes next.

II- The 3 Phases of the Project Closure Process

- Depending on the context, it may be appropriate to invite the **Upper-Level Supervisor** who gave the green light for the Project to participate, too.
- Each **Project Closure** phase helps to create an **Organizational Culture** of **appreciation, gratitude, and accomplishment**.
- Take the time to do this right, in ways meaningful to your specific circumstances, and you've set the stage not just to move on but also to take a step forward.

III- The Project Closure Elements

III-1- The Project Closure Activities

- Project Closure activities are things you do to seal the professional tone of your work. These also include celebrating accomplishments and identifying ways to build toward the future.
- Project Closure activities are based on the three phases and include these options:
- Facilitate Team meetings both to tie up loose ends and review lessons learned. You've been working as a team to produce high-quality deliverables. Now, you've come back as a Team to close out your work in a clear, productive manner.

III- The Project Closure Elements

- **Schedule** one-on-one Team Member meetings to identify individual learning and professional development.
- Review contracts and human talent-related duties to ensure all vendor contracts are fulfilled and all people are paid.
- Hold **Team Meetings** to review the Project's learning arc and overall learning outcomes of benefit to the Team and to future project Teams.

III- The Project Closure Elements

- Conduct a project manager meeting with the upper-level supervisor to bring the project to a formal close from an organizational perspective. This meeting may also be a good time to share specific contributions and skill sets identified among team members.
- Delegate responsibilities for tying up loose ends and provide clear instructions about how to report back.
- Host a celebratory gathering to acknowledge and show gratitude to team members for their accomplishments. Be sure to have fun in a manner that is appropriate for your team and in alignment with the organization's culture. Now is the time to acknowledge contributions of each team member and those of supporting departments or supervisors.

III- The Project Closure Elements

- Prepare the project closure report that incorporates text from each phase of the project, from initiation to closure, with an emphasis on process, deliverables, lessons learned, and overall outcomes. While the project manager prepares this report, it's important to include team feedback.

This document serves as a critical reference for the immediate project supervisor who gave the green light; for the current project manager if any questions about the project arise; for team members and for future project managers to review before initiating a new project. Archive this document in an accessible location for the benefit of the organization.

III- The Project Closure Elements

III-2- Project Closure Deliverables

- Project closure deliverables are items identified as the outputs of the project. Deliverables may take many forms, depending on the project at hand, including the following:
- Competitor market share analysis, including opportunities for growth
- New, streamlined team or resource management processes
- Processes for matching and maximizing talent and organizational needs
- Software for tracking new leads and existing client contacts

III- The Project Closure Elements

III-3- Project Closure Checklist

A Project Closure checklist is a tool to help Project Managers verify that the Project fulfilled its outcomes before they close the Project.

They can document any **challenges**, **lessons learned**, and any **outstanding deliverables**.

CHECKLIST TO CLOSE A PROJECT

-  Deliverables are handed off and signed off by stakeholders
-  All documents are organized and signed by the appropriate person
-  Financials: pay off all invoices and close out all project-related contracts
-  Finalize all project reports and archive them for future reference
-  Assign transition support person to shepherd the project after completion
-  Release or reassign project resources, which include people and equipment
-  With project management software, project closure is more efficient
-  Don't neglect to celebrate a successful project, everyone deserves it

PROJECTMANAGER

IV- The project Objectives and Scope

IV-1- The objectives of the Project Closing process are to:

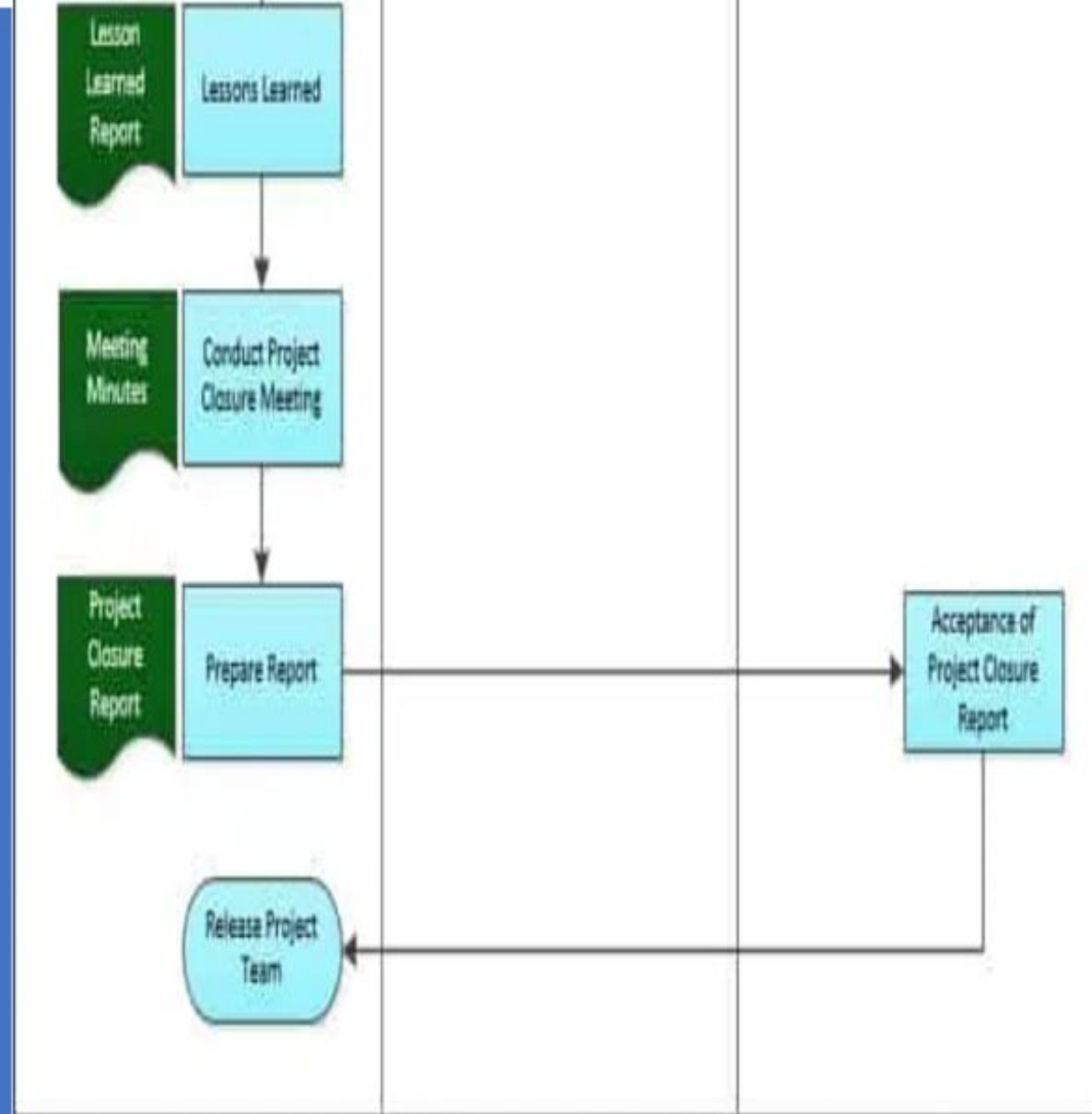
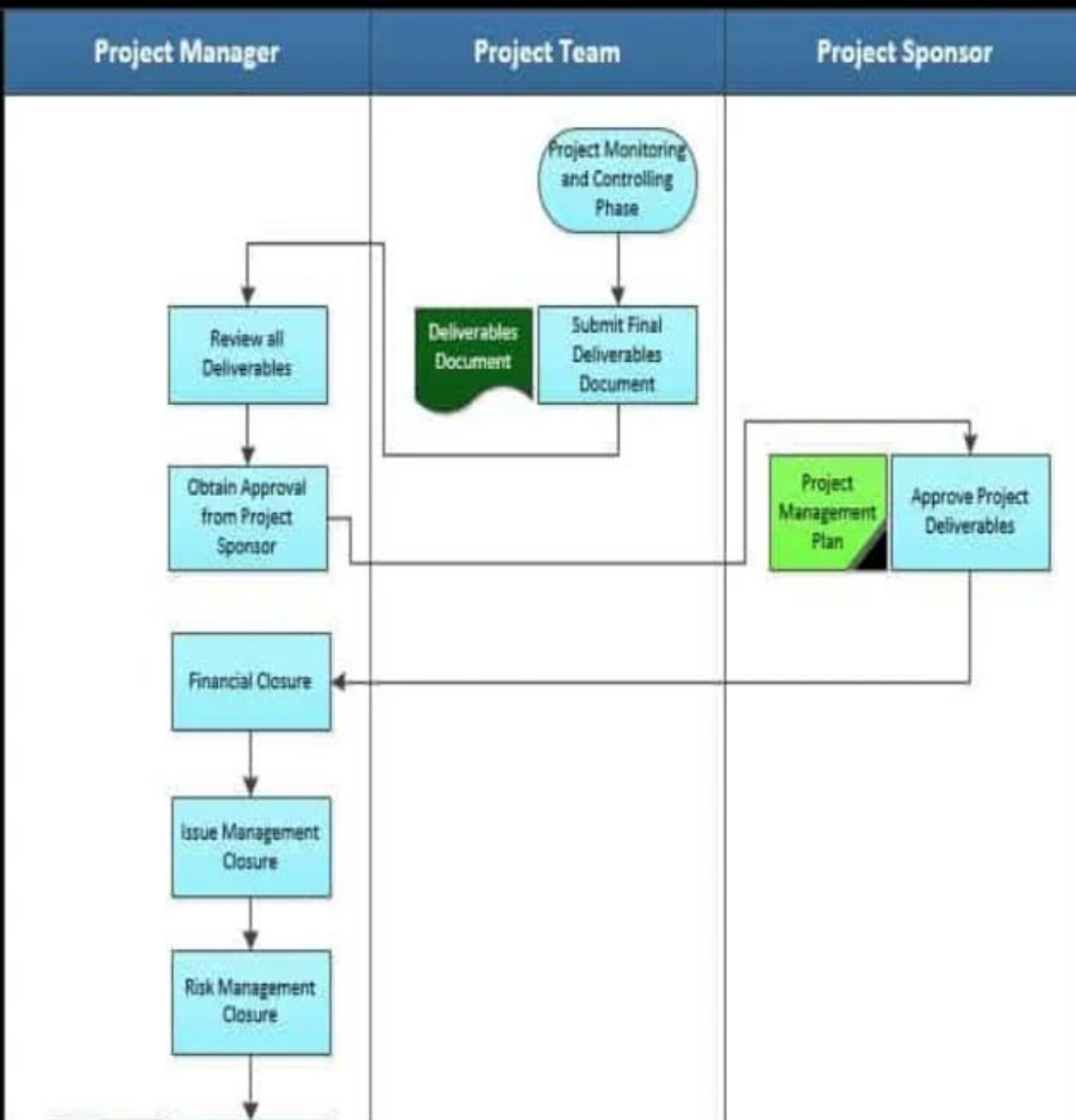
- Ensure project deliverables are approved and transferred to the assigning party.
- Assess whether the project was done in accordance with the plan
- Make sure that all project plans and documentation are transferred to the client and archived
- Release project team members involved in the project
- Determine the lessons learned throughout the project

IV- The project Objectives and Scope

IV-2- The Scope of the Project Closing Process includes:

- a. Approval and acceptance of Project Deliverables and reviewing if they meet the Requirements.
- b. Transferring **Project Documentation** and plans to the assigning party for archiving.
- c. **Issue Management, financial, and Risk Management Closure.**
- d. Gathering the **Lessons Learned** from the Project.
- e. Conducting **Project Closure meeting** and **releasing the Project Team.**

PROJECT CLOSING PROCESS



Project Closing Process Flow Chart

V-Project Closure Best Practices

Below is a **Guideline** that Project Managers could use to close their Projects comprehensively:

1. Ensure those operations and any and all other **departments/units/parties who will use the product(s)** of the project have the necessary **training, tools, documentation, and capability to perform their role.**
2. Ensure that the Project has satisfied the **Strategic Goal(s)** for which it was undertaken.
3. Ensure that the whole **Scope of Work** has been completed, and make sure to receive formal documented acceptance from the **Client** and **Sponsor.**

V-Project Closure Best Practices

4-Review all **Contracts** with the **Project Team** and **Suppliers**. Make sure that all parties have satisfied their **contractual obligations**—that the Suppliers have delivered all of the products or services required of them and that the Organization has made all **pertinent payments**. Release bonds if necessary, and make sure the Supplier provides all supplementary Deliverables, which may include, but may not be limited to **Product Documentation, Drawings, Warranties, Service Contracts, Lien Waivers**, and so forth.

5- Review **Project Management Practices**.

6- Document **Lessons Learned** for future reference.

7- Disband the **Project Team** and officially return **Resources** to their functional locations.

V-Project Closure Best Practices

- **Successful Project Closure** ties every aspect together:

what you've done

how you've done it

why it's important

- Don't be shy about tapping into your best **technical expertise** and **human-centered**, celebratory self to this critical phase of every project.
- Here's a handy list of **Project Closure best practices**:

Focus on Interactivity

Great leaders share the spotlight, so now's your chance to create that inclusive, interactive project space that brings out the best in each team member. Take the time to show how much each person mattered to the project's success. Whether you're focused on technical, learning, or human-centered phases of closing a project, involving each team member affirms their roles and ensures the project is meaningful from start to finish.

Realize Inclusivity is Essential

If some team members work remotely, be sure they are fully acknowledged, engaged, and contributing as actively as team members who may be in the same physical space. Furthermore, over the course of the project, you've probably figured out that each team member's style is different. Create space for everyone, as equitably as possible, by noticing how some team members may not be aware that they tend to dominate discussions or compete for attention, while others may tend to defer.

Be Open

Project Closure requires professionalism, but that doesn't mean rigidity or checking boxes. Make sure the Team feels safe sharing and participating in each phase of Project Closure. Each Team Member brings their own Skills, experience, and perspective to the project, so be sure to set the stage for an open conversation that encourages everyone to contribute in ways they feel comfortable. Especially during the **Learning Phase**, when you review what's worked well and what team members think could be better next time, it's important to restate the purpose of sharing ideas and reflections on the Project's Process and final Outcomes.

Create Space for Best Team Member Performance

The best Project Closure takes place over a period of time. You may have a week to tie up everything or only a few days. Do your best to create emotional space between each project closure phase. This step can help ensure each team member is fully present and able to contribute fresh ideas and reflections that are neither rushed nor muddled. If your team works best in the morning, schedule project closure phases on staggered mornings over the course of a week.

Communicate in a Purposeful and Clearly Defined Manner

Set the stage for Project Closure and each of its phases through **clear Communication**.

During your last meeting before Project Closure begins, inform the Team what Project Closure is, why it's important, and how you'll accomplish Project Closure as a Team over each phase.

Provide a review of **Project Closure Goals** and your Process for accomplishing them in writing.

At each step of the Project, you've brought the Team together and created **Team buy-in** because you've communicated well and with respect.

Project Closure requires the same careful attention to the Team to ensure **the best possible outcomes** for them, you, and the Organization.

Assign Closing Tasks to Team Members

You're the project manager, but that doesn't mean you have to or should be doing all of the project closure work. Teams are collaborative by nature. Keep the strong collaborative nature of the project going throughout each phase of project closure: Assign roles, ask for volunteers to keep track of project closure outcomes, and de-center yourself by asking other team members to facilitate project closure discussions.

Build a Foundation for Organizational Success

Some Projects have great Teams that get along well and accomplish each task quickly and easily.

Other Teams may struggle to work together or to **achieve Project Goals** for technical reasons outside of their control.

Other Projects may have both qualities at different points in the Process.

No matter the situation, remind the Team why you're there, what you've learned, and how project closure helps to anticipate — and possibly **avoid** — **Project Issues in the future**.

The Process can help ensure **organizational success** and **client satisfaction** both **today and in the future**.

Close Project or Phase

Inputs

- .1 Project charter
- .2 Project management plan
 - All components
- .3 Project documents
 - Assumption log
 - Basis of estimates
 - Change log
 - Issue log
 - Lessons learned register
 - Milestone list
 - Project communications
 - Quality control measurements
 - Quality reports
 - Requirements documentation
 - Risk register
 - Risk report
- .4 Accepted deliverables
- .5 Business documents
 - Business case
 - Benefits management plan
- .6 Agreements
- .7 Procurement documentation
- .8 Organizational process assets

Tools & Techniques

- .1 Expert judgment
- .2 Data analysis
 - Document analysis
 - Regression analysis
 - Trend analysis
 - Variance analysis
- .3 Meetings

Outputs

- .1 Project documents updates
 - Lessons learned register
- .2 Final product, service, or result transition
- .3 Final report
- .4 Organizational process assets updates



SUMMARY



-The- PROJECT CLOSURE PROCESS

Finalize
Project
documents



Make sure your deliverables
have met their definition of done
→ hand them off to team
or client



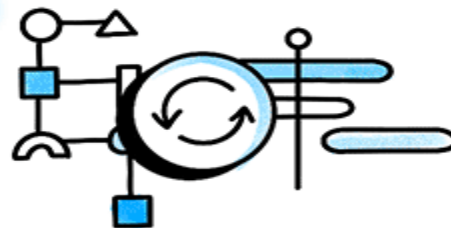
Hold retrospective meeting to
share & document lessons learned



Complete final closure reports
→ send to stakeholder &
executives



update process/project
plans based on what you've
learned & shipped



Hand off responsibility to
relevant team



Project Closure Phase

All deliverables exit criteria are met

Transfer of deliverables to customer & support functions

PIR report records recommendations & lessons learnt for future projects

CLOSE-OUT REPORT

PROJECT SUMMARY

→ Did it reach completion & meet initial expectations?

BUDGET EXPECTATION

→ Did the project hit the original estimated budget? Include estimations, reasons for going over, and any other surprises.

SCHEDULE EXPECTATION

→ Did the project follow the expected timeline? Why or why not?

RISKS

→ Were there any unexpected risks you didn't include in your risk management plan?

LESSONS LEARNED

→ What did your team learn?
Where are lessons learned being stored?



THE END

THANK YOU FOR YOUR ATTENTION