

6. Project Management Toolkit: Close the Project

Why do we need a process for closing a project?

The project closing provides assurance that all work has been completed, that all agreed upon activities have been executed and provides formal recognition of the completion of the project - everyone agrees the project has been completed. Project closing can help an organization or project lead avoid miscommunication, conflict, orphaned projects or never-ending projects. Watch this short video to learn more about why closing a project is important.

Key Questions:

1. What needs to be done to finish this project?
2. What did we learn from this project?

When you are developing project planning materials do not forget to plan for the end. Remember projects are temporary and have a beginning and an end. If the project goes on indefinitely, is it a project or something else?

To close the project, we need to understand what the project was, what the goals were, what were the key deliverables and who can sign off on project completion. When initially planning the project, you developed a plan based on the scope of work for the project. The project plan will help you in project closing.

Did you fulfill the project goals and meet objectives?

At this point you should look back at your project planning documents. The project manager, lead or owner will look at each project deliverable and confirm completion or delivery. Conversely the project lead may have done this at the end of each project phase. Final project deliverables may include a final report, budget, website, development of digital content, tech tool and/or delivery of know your rights workshops or train the trainer events. These deliverables may be required by the project funder or sponsor. All deliverables should be reviewed by a project approver who may be the executive director or chief technology officer. Each deliverable should receive sign off and approval. You should keep track of these intermittent approvals and final approvals.

How do you close out the project internally?

Closing the project internally within your office or team is part of the project closing phase. It is important to ensure that projects are closed internally as well as with the project sponsor. You can develop internal documents like a project closing form to develop a checklist of items to demonstrate administrative closing. At the bottom of this page, there is a sample Internal Closing Checklist template that can be used as a starting point.

Now is the time to ensure the project team followed internal project management and governance policies. Internal policies may include developing and following project plans and saving documents in the appropriate document management repository whether a shared drive or cloud-based application like SharePoint, DropBox, Google Drive etc.

Consider any relevant documents that must be filled out or sent to project stakeholders and ensure there is a copy in your document repository. It might be helpful to have an internal meeting to close the project with the project team using the project closing checklist.

Many times, when we finish a project, we don't dedicate time to celebrate. Many (accidental and professional) project managers have multiple projects and limited time. However, if you do not take time to celebrate your successes this can lead to burnout. Celebrate as big or small as your team needs but do not forget to thank team members for their efforts and acknowledge what you all achieved. Watch this video to learn more about what the success of a project looks like.

Post-Mortem

This may sound morbid, but we are evaluating our work on a now closed (dead) project. Remember projects are timebound. This is the time to document any lessons learned. Try not to wait too long to do this since there are things you may forget. You may also want to keep a list of lessons as you learn them. Schedule a final project meeting to discuss what went well and what did not go well. What changes to our approach would benefit future projects? Did we develop any new processes during this project such as (requesting sign off at end of each phase)? Did we develop any new templates, samples or work products that can and should be used in future similar projects? Make sure that this information is shared and available for future project leads/staff who may lead a similar project. This time is not to place blame for mistakes but to reflect as a team.

Here are examples of lessons learned during a project:

- Weekly project status reports worked well to maintain open communication.
- The new project planning document helped keep the project moving forward.
- Having J speak with the sponsor to clarify project goals and objectives improved workflow.
- Roles were not clearly defined.
- We did not include the right people on the team, or our team did not represent the people we hoped to serve as a project outcome.
- We paid our contractors late and incurred late fees.

To systematically memorialize the lessons learned from each project that will contribute to the institutional knowledge of the program, the project manager can develop an organization-wide Lessons Learned Repository that current and future

project managers can contribute to during the closing of a project. Here are foundational questions to start this endeavor:

- What was done well and should be documented to repeat in future projects?
- What could have been improved? How could it have been improved?
- Were there any new processes developed?
- Were there adequate resources for the project in terms of personnel, technology, and software?
- Did any issues arise outside of the team's control?

Not all lessons will be for all future projects, but you are building internal memory, demonstrating to the project team that their feedback matters, teaching that this is a learning environment and making sure knowledge does not just live in one project leader or one team's collective brain.

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