# CHAPTER 9

Closing the Project

Chapter Concepts

- Actions that should be taken when closing a project
- Conducting a post-project evaluation
- The importance of documenting lessons learned
- The need to organize and archive project documents
- Obtaining feedback from the customer about the project
- Early termination of projects

Learning Outcomes

- Identify actions that should be taken during the process of closing a project
- Conduct a post-project evaluation
- Discuss the value and use of lessons learned
- Explain the importance of organizing and archiving project documents
- Obtain customer feedback about the project
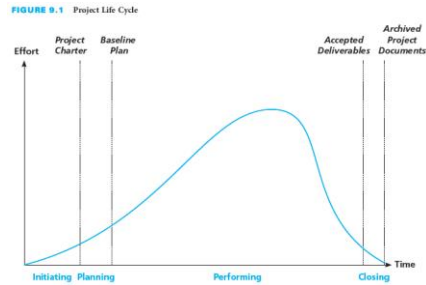- Describe situations that could result in early project termination

Project Management Knowledge Areas from *PMBOK® Guide*

Project Integration Management
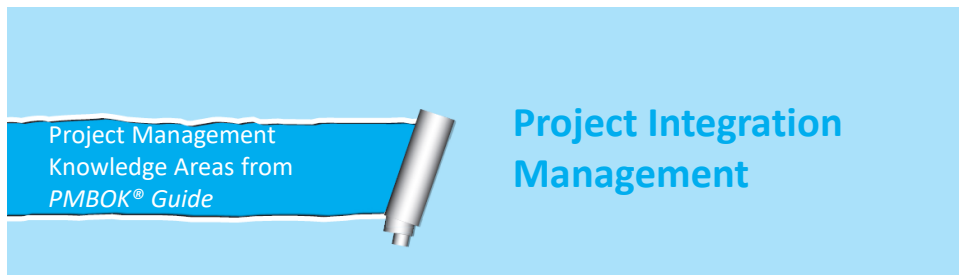
Project Closing Actions

- Collect and make final payments
- Recognize and evaluate staff
- Conduct post-project evaluation
- Document lessons learned
- Organize and archive project documents

FIGURE 9.1 Project Life Cycle

Final Payments

- Payments from customer
  - Have activity listed to perform collection
  - Assure that all the payments have been received
- Payments to others
  - Verify all payments have been made
  - Record actual costs
- Account closing
  - Perform financial analysis on the project
  - Compare actual costs versus baseline budget
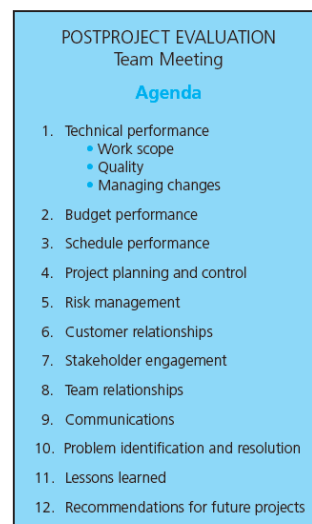
Staff Recognition and Evaluation

- End project with recognition and celebration
  - Recognize team members for contributions
  - Celebrate the success of the project
- Prepare individual performance evaluations
  - Mention how knowledge expanded during project
  - Identify areas where need further development
  - Share during individual meetings or give to supervisor

Post Project Evaluation

FIGURE 9.2   Postproject Evaluation Team Meeting Agenda

- Review and evaluate project performance
- Identify improvements
- Hold individual meetings with members
- Hold project team meeting
- Prepare written report with lessons learned and recommendations

POSTPROJECT EVALUATION
Team Meeting

Agenda

1. Technical performance
   - Work scope
   - Quality
   - Managing changes
2. Budget performance
3. Schedule performance
4. Project planning and control
5. Risk management
6. Customer relationships
7. Stakeholder engagement
8. Team relationships
9. Communications
10. Problem identification and resolution
11. Lessons learned
12. Recommendations for future projects

Lessons Learned

- Purpose of identifying and documenting
  - Capitalize on knowledge and experience gained
  - Improve performance on future projects
- Knowledge base system or repository
  - Retrieve lessons learned from prior projects
  - Easily access information by category or subject
- Record keeping throughout project
  - Capture lesson at time of lesson instead of end of project
  - Have as agenda topic at meetings and in training sessions

Archive Project Documents

- Organize, file, and archive appropriate documents
- Organize system to make information easily retrievable
- Create database of common data elements
  - Analyze elements for trends
  - Examine records for bidding, planning, and performing future projects

Customer Feedback

- Post-project evaluation meeting with customer
  - Determine if provided the expected benefits
  - Assess the level of customer satisfaction
  - Obtain any feedback with open-ended questions
  - Discuss future opportunities
  - Secure permission to use as reference
- Participants
  - Key project team members
  - Key customer representatives
  - Project manager

Post-Project Customer Evaluation Survey

- Analyze for trends
- Seek permission for reference

FIGURE 9.3 Postproject Customer Evaluation Survey

Critical Success Factors

- **Recognize** the project team and celebrate accomplishments throughout the project.
- **Regularly ask the customer** about the level of **satisfaction** with the performance and progress of the project and take corrective action at the first hint that the customer is not satisfied.
- After the conclusion of a project, the **project performance** should be **evaluated** to learn what could be improved if a similar project were to be done in the future. Feedback should be obtained from the customer and the project team.
- **Capture and document** lessons learned **throughout** the performance of the project.
- **Establish a knowledge base** of lessons learned and ensure that they are communicated and used on future projects.
- **Organize** and **archive** project documentation and **analyze** key data that could be helpful in bidding, planning, or performing future projects.
- **Retain customer evaluation and feedback** information that could be valuable in developing proposals for other projects for the same customer in the future.

Summary

- The fourth and final phase of the project life cycle is closing the project.
- An important project closing action is staff recognition and evaluation.
- Conduct post-project evaluation meetings within the project team or organization with individual team members and a group meeting with the project team to gather team feedback for improved future performance.
- Identify and document lessons learned to capitalize on the knowledge and experience gained on the project in order to improve performance on future projects.
- The project team or contractor should ensure that copies of appropriate project documentation are properly organized, filed, and archived so that they can be readily retrieved for future use.
- Conduct a post-project evaluation meeting, or distribute a customer evaluation survey to the customer or sponsor to determine whether the project provided the customer with expected benefits; assess the level of customer satisfaction; and obtain any feedback that would be helpful in future business relationships with this customer or with other customers.
- Projects may be terminated before completion for various reasons.