Delivery Project Offboarding

Project wind down, client handover and offboarding

DocumentID: DELIVERY-PROJECT-OFFBOARDING

This document outlines the checklist that needs to be completed to check off successful offboarding from a project. The checklist needs to be completed for every project. If not, please provide a reason why it has not been completed (e.g. not relevant to project, information not available)

This is the final list of deliverables. Steering committee to ensure that [this list](https://docs.google.com/document/d/1Fe0ECD1TZiFcFPhkIOrtWX-C_0fSaSqz-v1DEilhKpU/edit?usp=drive_link) is complete at the end of the project

## Case studies

1. **Ownership**: Product Manager with input from project team members and marketing team

* Create an internal case study (or multiple case studies as required) for the project by using this standard [template](https://docs.google.com/document/d/1LyowMWwytCOwjASIgJgCs9TmacxBzJkbboO_WGPcQD4/edit). Here is a [Sample](https://docs.google.com/document/d/1W14B9cNBQRpN2HptjeR1W5FBnu0UUGat2lJUGHJK0bM/edit). Aim of the internal case study is to be detailed enough for a new TS team to understand what the project entailed. This is only for internal use, not to be shared externally
* Create an external case study (or multiple case studies) for the project by using this standard [template](https://docs.google.com/document/d/1LyowMWwytCOwjASIgJgCs9TmacxBzJkbboO_WGPcQD4/edit). Here is a [Sample](https://docs.google.com/document/d/1E8pY8cQFL2DCngytaq_7E8xzYt_iy8Pt0rACmSwIOJQ/edit?usp=drive_link). Goal is that this document contains enough high level knowledge for a prospective client to contact us. Ensure this info is sharable outside TS
* Work with the marketing team to get the external case study ready in a format which can be shared on the TS website
* Work with the marketing team to have case study slides created (within the master TS case studies deck - owned by marketing)

## Post-mortem

1. **Ownership**: Product Manager with input from project team members
2. Conduct the post mortem (checklist below) using this [template](https://docs.google.com/presentation/d/1s3bqh84RnySNemXVP1hkTKglPZ2kYpQVgq0L1gf95pc/edit#slide=id.p).
3. Here is a [Sample deck](https://docs.google.com/presentation/d/15-stuTs7dcB4KFmlsbaFA8EPMkHORK_QYi1RKwvDBSQ/edit#slide=id.p) of a filled out post mortem deck

* Hold internal post mortem meetings
  + Project team postmortem - Conduct a retro style postmortem (ideally ‘what worked’, ‘what did not work’, ‘what did we learn’ format) with the core project team. [Sample retro board](https://www.reetro.app/board/616620fe374f1200170e6e72/65ccc92993259a3a09f4bf59)
  + Business team postmortem - Conduct a postmortem with the business team to fill in the business review section in the template above
  + Ensure the postmortem deck is complete with all sections on wins/losses/opportunities/action items filled out
  + Create action items from postmortems in the steering committee board and ensure they are delegated to the right team member.
  + Once action items are completed, share with the whole project team, and with the wider company if actions impacted company level processes

## Handover

1. **Ownership**: Product Manager with input from project team members

* Fill out the project handover deck using this [template](https://docs.google.com/presentation/d/16wc-ZPl1nV-_TURA1SBw9FquqtSGjfQBfMlDbu0Y2xw/edit?usp=drive_link). Here is a [sample](https://docs.google.com/presentation/d/1ckmb7kcRbvT0x7vXoy8kcCdDyzHS4T7kB7qrC9w0SRg/edit#slide=id.p)
* Share the deck with internal and external stakeholders before the project is completely offboarded.

## Client interviews on project and individual feedback

1. **Ownership**: Product Manager with HR assistance

* Steering committee to create a person mapping and distribute to HR
  + Identify key members on the client side that should provide feedback on the project and team individuals.
  + Identify Any C level executive to provide feedback on overall engagement
* PM to schedule time between the HR team and the client members identified using [this email template](https://docs.google.com/document/d/19-H8CIerPzH_a9LQ8O_EAWbJcS2DOv6oQ7tVgFd8fqM/edit).
* PM to schedule time between Client Service Rep and C level exec from client.
* CSR to conduct C level interview using [this template/script](https://docs.google.com/document/d/1eGfuESTQPW5ypF1nwYnA_HuUYq8M2thWu9QN-ZVtW9w/edit) to run the interview
* HR to conduct client side interviews using [this client feedback template](https://docs.google.com/document/d/1II9C3bmflCoBKZVQhyPtrxRv6QX0WptxWOVJMEVWzpw/edit#heading=h.ydenf4dfzjke)
* HR to absorb individual level feedback into the performance process
* HR to distribute project specific feedback to PM
* PM to add HR project notes to the project post mortem deck

## Handling external access for team members

1. **Ownership**: PM with IT support

* PM to notify IT on client side to initiate the offboarding process
  + If this is a phased offboarding, PM to send email notifying change in project team to both internal and external - This can be done in weekly email too

## Handling internal access for TS team members

1. **Ownership**: PM with IT support

* Remove individuals from Distribution Lists as needed
* Remove individuals from cadence as needed
* Ensure Allocations is updated
* PM to send email notifying change in project team to both internal and external stakeholders

## Knowledge Transfer

1. **Ownership:** Product Manager to set up & project team to conduct

* If knowledge transfer needs to be done, ensure that the scope for KT has been defined and the sessions are set up accordingly while the project is in off boarding phase

## Client follow up

1. **Ownership:** Client Services Manager

* After approximately 3 months follow up with the client on how post project environment is like and also learn of any outcomes (business and product) as a direct result of the work done by Tribalscale