

Project Close-Out Report Template

Project Close-Out Report	
Report Date: May 31, 20XX	
KEY INFORMATION	
Project Name	AHI Real-Time Marketing Data App Project
Division/Department	Project Manager
Project Sponsor	Mary Smithers
Project Manager	Cary Manning

PROJECT GOALS
Document the original goals from the project charter.
1. Real-Time Market Trend Tracking
2. Secure Order Invoicing
3. Secure Invoicing and Processing
4. Emerging Market Targeting
5. IT Hardware/Software Compatibility

PROJECT GOAL SUCCESS ANALYSIS
Highlight the success or failure in meeting the project goals from the original plan and explain deviations. (Success, Partial Success, Not Accomplished)
1. Partial Success – Delivered dashboard with core analytics, but two advanced data feeds omitted due to scope creep. Feeds deferred to v2 of the App.
2. Success – Fully implemented, with user-friendly UI and email confirmations, meeting customer focus group expectations.
3. Success – Delivered batch invoicing and logs, achieving 100% accuracy. Customer feedback validated functionality.
4. Partial Success – Partially delivered; core reports implemented, but several desired reports omitted due to incomplete requirements. Deferred to v2 of the App.
5. Partial Success – Achieved compatibility, despite initial over-purchase. Minor interface issues pending resolution by Nov 15, 20XX.

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SCOPE REVIEW

Call out any variances to the original scope plan and briefly describe why they happened. Can these variances be prevented in future projects? If so, how?

Planned: 20 story points across five user stories.

Actual: ~18/20 story points delivered, with two data feeds and Leadership reports deferred to v2 of the App due to inadequate requirements. Multiple change requests addressed via CCB.

SCHEDULE REVIEW

Call out any variances to the original schedule plan and briefly describe why they happened. Can these variances be prevented in future projects? If so, how?

Planned: 90-day development cycle, two 30-day sprints.

Actual: Completed in 90 days with a third sprint, approved by Mary Smithers. Minor interface fixes extend to Nov 15, 20XX.

COST REVIEW

Call out any variances to the original budget plan over or under and briefly describe why they happened. Can these variances be prevented in future projects? If so, how?

Planned: \$250000

Actual: \$257000, with a \$7000 overrun (\$2000 equipment, \$2500 data feeds, \$2500 inflation). Overrun absorbed by \$25000 contingency.

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RISK ANALYSIS

Call out anticipated or unanticipated risks that impacted the project. Could these risks be prevented in future similar projects? If so, how? Refer to the Risk Register to review or link to register directly.

1. Inadequate Requirements Gathering: Initial failure to capture all Marketing/Leadership requirements led to omitted data feeds and reports, triggering change requests and scope creep. Deferred to v2.
2. Budget Overrun: \$7,000 additional costs (\$2,000 equipment, \$2,500 data feeds, \$2,500 inflation) exceeded \$250,000 budget, due to planning omissions and unforeseen inflation.
3. Team Inexperience: Mixing predictive and adaptive methods (due to Cary Manning's lack of Scrum expertise) reduced efficiency. Lack of initial Scrum training impacted velocity accuracy (Status Report).
4. Recruiting Issues: IT filled only one of two approved positions, straining capacity. Second hire delayed to December 1, 20XX.

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OUTSTANDING ITEMS		
List any outstanding project-related follow-up items, how they are being addressed, and who is responsible.		
Issue	Planned Resolution	Assigned To
Resolve Interface Issue by Nov 15, 20XX	Coordinate IT fixes for minor app interface issue. Test app. Validate QMP standards.	Priya Service Keiko Tanaka (testing)
Plan v2 Development by Dec 15, 20XX	Update product backlog with deferred data feeds and Leadership reports. Submit v2 charter to Mary Smithers, including budget (\$5000) for feeds	Cal Hamer Cary Manning
Complete IT Hiring by Dec 1, 20XX	Onboard second IT hire to fill vacancy. Update RACI chart for v2 roles.	Priya Service HR
Conduct Scrum Training by Jan 15, 20XX	Scrum training for the team, (~5000, contingency budget), focusing on sprint planning and velocity estimation.	Cary Manning
Archive Project Documents by Nov 30, 20XX	Archive project artifacts in AHI's repository.	Cary Manning

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LESSONS LEARNED	
DID WELL Note what aspects of the project went well or better than expected, and share your thoughts on how this positive outcome could be replicated in future projects.	
ITEM	NOTES
Schedule	Successful delivery within 90-Day development cycle
Customer requirements met	High customer satisfaction and core functionality delivery
Seamless app integration	Effective IT infrastructure compatibility
Proactive team contributions	Jose Garcia identified and resolved an issue
Effective stakeholder engagement	Stakeholder engagement and feedback integration
Budget management	Managed a \$7000 overrun and stayed withing budget contingencies.
DO BETTER Note what aspects of the project went poorly or worse than expected, and share your thoughts on how this less than desirable outcome could be avoided in future projects.	
ITEM	NOTES
Enhance Requirement Gathering	Conduct thorough stakeholder workshops pre-project to capture all requirements, reducing change requests and scope creep. Engage Marketing/Leadership early via Communication Plan surveys.
Invest in Scrum Training	Provide Scrum training for Cary Manning and team before sprints to ensure consistent Agile practices, improving velocity and planning. Avoid mixing predictive/adaptive methods.
Improve Velocity Estimation	Base team velocity on historical data or pilot sprints, not assumptions, to align story point commitments with capacity. Use burndown charts proactively to track progress.

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Account for Inflation and Risks	Include inflation and equipment contingencies in initial budget planning to prevent overruns. Update Risk Register for economic factors.
Strengthen Recruitment	Partner with HR early to fill vacancies, mitigating resource risks. Forecast hiring timelines realistically to support IT capacity.
Strengthen Recruitment	
Note any recommendations for future project managers managing similar projects.	
<ol style="list-style-type: none">1. Adopt Structured Scrum: Implement full Scrum practices to improve efficiency.2. Enhance Change Management: Use CCB proactively to control scope creep, limiting change requests.3. Invest in Early Planning: Allocate time for comprehensive requirements gathering and risk assessment to avoid omissions.4. Build Team Capacity: Secure IT hires pre-project and provide Agile training to ensure readiness.	

PROJECT ARCHIVES
Note where those wanting to reference documents related to this project in the future will be able to find them.
The project is archived in AHI's project repository with access restricted to stakeholders.

PROJECT CLOSEOUT
<ul style="list-style-type: none">• Lessons Learned Conducted: Date Aug 29, 20XX• Closeout Review Complete: Date May 31, 20XX