**Phase 4: Monitoring & Control**

The **Monitoring and Control phase** ensures that the project stays on schedule, within scope, and aligned with performance expectations.  
In the context of the AMC Process Automation Project, this phase was critical because it involved measuring the impact of automation, tracking progress, resolving issues, and maintaining transparency with stakeholders.

**1. Dashboard KPIs and Real-Time Tracking**

After the Jira automation system went live, one of the most important activities was setting up **Key Performance Indicators (KPIs)** in the project dashboard.  
These KPIs allowed the team to measure how well the new process was working and whether it met the objectives set during the planning phase.

**Key metrics tracked:**

* **Manual Follow-up Reduction (Target: 40%)** – This tracked how often tasks required direct reminders or manual communication. Automation rules (like due date reminders and SLA alerts) reduced this significantly, improving response time.
* **SLA Adherence (>90%)** – This ensured tasks were completed within agreed timelines. It provided early warnings when any ticket risked breaching its deadline.
* **Automation Success Rate** – This metric measured the percentage of tasks that completed automatically without human intervention.

These dashboards updated in real-time, giving both **Carri (Sponsor)** and **Ismael (Project Manager)** instant visibility into performance.

A screenshot of a dashboard

AI-generated content may be incorrect.

**2. Reporting and Performance Communication**

Effective reporting was key to maintaining transparency and building trust between the project team and leadership.

**Two reporting cycles were maintained:**

* **Weekly Reports:** Summarized accomplishments, issues, and action plans. These reports helped the team stay aligned and gave Ismael a quick status snapshot.
* **Monthly Reports:** Focused on trends and improvements. These included graphical summaries of metrics (e.g., SLA adherence trendlines, automation impact charts) and helped identify long-term benefits like cost savings and efficiency growth.

The reports were shared through **SharePoint** and **Jira dashboards**, ensuring accessibility and version control. This structured communication reduced misalignment and helped decision-makers act quickly on emerging risks.

A diagram of a project

AI-generated content may be incorrect.

**3. Risk and Issue Management**

No project runs without challenges, and that’s where the **Risk and Issue Log** became essential.  
This document, updated every two weeks, captured:

* **Existing risks** (like user adoption hesitation or technical bugs).
* **New risks** discovered during live operation.
* **Mitigation actions** (training, bug fixes, process tweaks).

All entries were version-controlled in SharePoint for audit readiness.  
By logging issues promptly, the team could act before problems became major roadblocks — maintaining smooth, uninterrupted operations.

**4. Change Management and Control**

As the automation system evolved, the team needed a disciplined way to handle configuration updates.  
A **Change Management Process** was implemented where any workflow, dashboard, or automation modification had to:

1. Be logged in Jira.
2. Be reviewed by the **Project Manager (Ismael)**.
3. Receive final approval before deployment.

This avoided confusion, ensured version control, and preserved the integrity of workflows already being used by the team.  
Each change was documented with timestamps, approvers, and comments — creating a traceable audit trail aligned with FEMA compliance standards.

A diagram of a change management process

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**5. Outcomes of Phase 4**

By the end of this phase:

* Automation reduced manual follow-ups by more than **40%**.
* SLA adherence consistently stayed above **90%**.
* The AMC team achieved **full visibility** over their daily work through dashboards.
* Stakeholders had confidence in data accuracy and process accountability.

This phase confirmed that automation wasn’t just working — it was improving how AMC managed FEMA administrative costs every day.

**Phase 5: Closure**

The **Closure phase** represents the formal completion of the project.  
This is where results are documented, performance is compared, and long-term sustainability is ensured through knowledge transfer and handover.

A diagram of a project closure

AI-generated content may be incorrect.

**1. Final Project Report**

The final report acted as the project’s “story of success.”  
It included:

* **Before-and-after comparisons** of performance metrics, such as time savings and manual work reduction.
* **Efficiency gains:** Automation reduced process turnaround time by approximately 35–40%, while improving transparency across team activities.
* **Key lessons learned:** Examples included the importance of early user engagement, detailed workflow mapping, and regular communication with stakeholders.

This report was shared with senior management and positioned the AMC team as a model for digital transformation within FDEM.

A graph of progress bar

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**2. SOP Documentation**

To maintain consistency after the project’s closure, a full set of **Standard Operating Procedures (SOPs)** was created.  
Each SOP served as a practical guide for daily operations, ensuring that future team members could easily adapt without needing additional training.

The documentation included:

* How to **create and manage Jira tickets**.
* How to **review and approve cost submissions**.
* How to **interpret dashboards and metrics**.
* How to **update workflows** when approved by management.

All SOPs were stored in a version-controlled **SharePoint repository**, linked to the Jira project, ensuring accessibility and long-term reliability.

**3. Backup and Data Retention Plan**

To secure project data, a **weekly backup process** was established:

* All Jira data was exported in **JSON format** and uploaded to SharePoint.
* This included ticket data, comments, workflows, dashboards, and automation logs.
* A backup log tracked each export, ensuring that all records could be restored if needed.

Additionally, all project documentation — including risk logs, SOPs, and reports — was archived for audit readiness and long-term reference.

**4. Handover and Scalability**

After confirming that all objectives were achieved, the automation framework was formally **handed over to AMC leadership** for daily operations.  
The next strategic step was to **scale this model** across other FDEM departments such as:

* **Grants Management** – for tracking state-level reimbursements.
* **Recovery Operations** – for managing disaster-related projects.
* **Mitigation Planning** – for future risk reduction initiatives.

By replicating this framework, other departments could benefit from the same automation, visibility, and process consistency that AMC achieved.

A diagram of a diagram

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**5. Significance of Closure**

The closure phase wasn’t just administrative — it marked the beginning of a **new operational culture** at AMC.  
The team now had:

* A self-sustaining automation system.
* Clearly documented procedures.
* Measurable proof of performance improvement.
* A foundation to expand automation across the entire organization.

The closure report was presented to leadership as evidence that structured project management, when paired with the right tools, can create lasting operational transformation.

**✅ Summary**

| **Aspect** | **Phase 4: Monitoring & Control** | **Phase 5: Closure** |
| --- | --- | --- |
| **Focus** | Tracking performance, managing risks, controlling changes | Documenting results, transferring knowledge, scaling success |
| **Key Activities** | KPI tracking, reporting, risk log updates, workflow control | Final reporting, SOP creation, data backup, project handover |
| **Outcome** | Measurable improvement and accountability | Sustained efficiency and scalability |
| **Ownership** | Project Lead and PM (Ismael) | Project Lead and Sponsor (Carri) |