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Merrilton Robotics Data Migration Scenario

Closing Process

A. Project Closure Requirements

Project closure is a critical final stage that involves completing all project activities and formally ending the project. For the Merrilton Robotics data migration project, three key requirements for closure are:

1. **Final Deliverable Acceptance:** The primary requirement is to obtain formal acceptance of the project's final deliverables from the relevant stakeholders, including the project sponsor and functional managers. This means confirming that all data has been successfully migrated to the cloud-managed service provider (MSP), and all required testing activities—such as system integration testing, regression testing, performance testing, and user acceptance testing—have been completed and passed. This step ensures the new system is fully operational and meets the company's objectives.
2. **Contract Closure:** All contracts with external vendors, specifically the managed service provider (MSP), must be formally closed. This involves verifying that all terms and conditions of the contract have been met, all payments have been processed, and any disputes have been resolved. The legal department's approval is essential for this step to ensure the contract closure minimizes risk for the company.
3. **Lessons Learned Documentation:** The project team must conduct a comprehensive review of the project to document lessons learned. This involves identifying what went well, what could be improved, and any unexpected challenges that arose. This information is crucial for Merrilton Robotics' strong Project Management Office (PMO) to refine its guidelines, standards, and strategic alignment for future projects.

B. Project Closure Checklist

As the project manager, I would use the following checklist to verify all activities are complete before formally closing the data migration project.

- **Final Deliverable Acceptance:**

- Confirm all data has been successfully migrated to the MSP.
- Verify that all required testing (user acceptance, performance, regression, and system integration) is completed and approved.
- Obtain formal sign-off from the project sponsor and key stakeholders.

- **Financial Closure:**

- Verify all invoices from the MSP and other vendors have been received and paid.
- Reconcile the final budget against the \$2 million project limit.
- Close all project-related accounts and cost centers.

- **Contractual and Administrative Closure:**

- Ensure the contract with the MSP is formally closed and documented.
- Release project resources, including internal staff and external consultants.
- Close out all project documentation in the official repository.

- **Knowledge Transfer and Lessons Learned:**

- Conduct a final team meeting to document lessons learned from the project.
- Archive all project documents, including the project charter, plans, and reports.
- Ensure all project knowledge is transferred to the relevant departments, such as the IT team, who will now be managing the cloud infrastructure.

- **Stakeholder Communication:**

- Distribute a final project summary report to all stakeholders.
- Formally announce the closure of the project to all involved parties.

Project Reflection

C. Ethical Dilemma

An ethical dilemma could arise in the Merrilton Robotics data migration project in a situation involving risk and transparency. Let us assume that at the second stage of this project, a senior member who is a friend and key contributor discovers a critical security vulnerability in the MSP platform that could be used to leak sensitive customer data, while the MSP has assured the project team that this patch is scheduled to be released in six months.

The Dilemma: The project is going to be completed within time limits, and within budget, and has satisfied all UAT acceptance tests. To report such a vulnerability and demand it be immediately fixed would be a violation of the contract terms and probably cause the project's delay for several months; then considerable cost overruns would accrue, and penalties could be paid. The MSP has also privately alerted the project manager that publicity arising from this issue could cause great reputational harm to MSP and legal action against Merrilton Robotics for breach of contract.

This creates a conflict between two core duties:

- **Duty to the Company and Stakeholders:** The project manager is obligated to see that the project is finished on schedule and within the budget, according to set success criteria, and while honoring the contractual obligations agreed upon with the MSP.
- **Ethical Obligation to Protect Data and Customers:** The project manager is bound by fiduciary and ethical duty to act for the secure safeguarding of the sensitive data of the company and protection of customers against possible damage, even if only at greater direct cost or delay to the project.

The dilemma is whether to continue with the project closure and accept the MSP's long-term patch plan or stop the project and insist on having the fix done immediately, thereby fulfilling the duty of data protection but infringing professional obligations to deliver the project on schedule and budget.

Resolution:

Prioritizing the long-term ethics of data security over the short-term professional obligation of getting the project done on time and within budget, the project sponsor and chief stakeholders should be informed immediately of the possibility that the vulnerability may pose risks. Given the business case for proceeding as is (where deadlines and budget are paramount), and the ethical case for putting the project on hold to avert any risk to security, the project manager must present these cases for consideration.

Negotiations for a new mutually acceptable timeline with the MSP, during which project closure would be deferred until such time the vulnerability has been patched, would be the resolution. Should negotiations fail, the project manager must be ready to recommend contract termination and transition to a new provider. This would cause near-term financial and scheduling issues, but it would maintain the company's ethical promise to protect data security and achieve regulatory compliance, thereby preventing the more severe consequences of reputational damages or lost customer trust in the long term.

D. Acknowledgment of Sources

- Project Management Institute. (2017). *PMBOK Guide – Sixth Edition*.
- Project Management Institute. (2021). *PMBOK Guide – Seventh Edition*.

- Merrilton Robotics Data Migration Scenario (provided document)