



PMN204

Closing a Project

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Course Information

Objectives:

Upon completion of this course, the participant will be able to:

- ✓ List the consequences of proper and improper closure of a project.
- ✓ State at least two primary considerations of closing a project.
- ✓ Finalize a project using appropriate techniques and tools.
- ✓ Explain the benefits of obtaining sponsor sign-off.
- ✓ Evaluate a project's successes and failures.
- ✓ Complete project documentation, and archive materials and files.

Time Required:

3.5 hours

Prerequisites:

- ✓ PMN101 – *Introduction to Project Management* computer-based learning (CBL) course.
- ✓ PMN201 – *Initiating a Project* instructor-led class.
- ✓ PMN202 – *Planning a Project* instructor-led class.
- ✓ PMN203 – *Executing, Monitoring, and Controlling a Project* instructor-led class.

Exercise Files:

- ✓ Project Sign Off template (Project_Sign_off_template.dot)
- ✓ Lessons Learned template (Lessons_Learned_template.dot)

Closing a Project

Effective Project Closure

Even though you have completed your project deliverables, very important work still lies ahead. Project closure can be a celebration, but it should also be a gathering of knowledge and tools, and a deepening of relationships with your sponsor, other stakeholders, and project team. Although projects can fall short or be cancelled mid-stream, effective closure rewards the team and helps ensure future success on other projects and with careers.



When you close a project, one of your main tasks is gathering, creating, sharing, and archiving useful project information. Your department and organization learn from your experience and can apply this hard-won knowledge in the future. Of course, when project closure is skipped or neglected, knowledge and relationships may suffer. Ultimately, progress toward your departmental and organization goals may be slowed or stopped.

No matter if the project falls short, meets, or exceeds expectations, it's best to bring professional closure to this endeavor.

*—Ron Black, author of *The Complete Idiot's Guide to Project Management with Microsoft Project 2000**

Small Group Exercise: Project Closure

Directions: Brainstorm with your group to answer the questions below.

1. Why is proper closure of the project important? What are the benefits?

2. If a project is terminated prematurely, should you close the project? Why or why not?

Project Closure Steps

1. Project Information Update

Whether you used Microsoft Project or another tool, be sure to update the project information recorded in the software or paper-based system. Remember, these data are the raw material you will mine for knowledge. Be comprehensive and detailed. Seemingly insignificant information could have great value later.

Be sure to record all completed activities and make appropriate notes about each of them. Update their order, completion dates, durations, resources, and other information; it is rare that project activities are not adjusted in some way during a project. Again, this is important data, so make sure it reflects the conditions at project completion.

2. Project Sign-off

After updating your project management records, you will seek sign-off on the project from the sponsor. Use the Project Sign Off form to outline the project's objectives, deliverables, and approved changes, and confirm project acceptance by the sponsor.

3. Lessons Learned Meeting

Next, hold a team meeting after implementation to review the successes and areas of improvement for the project. Create an action plan to address the key lessons learned.

4. Archiving

Lastly, locate and collect all digital and physical project documentation and valuable files. Create secure physical and digital storage locations and a simple, common sense archiving structure and system.

Project Closure Considerations

The end of a project usually brings the satisfaction of completion for teammates and the sponsor, and it is an important transition time as each team member anticipates the next project or returns to regular duties. Thank your team for their hard work and for their contributions to the project. Thank your sponsor for the opportunity to contribute to the organization.

Ultimately, our patients and their families will be impacted by the sum of all our projects. When you close a project, remember to carefully manage all relationships and savor your successes with your team. Make time to celebrate!

Individual Exercise: Dimension® Xpand™ Plus Case Study

Directions: Read the below case study. Highlight key areas for project closure. You will need to be familiar with this information to complete the Project Sign Off and Lessons Learned forms in later class activities.



Integrated Chemistry System combines comprehensive chemistry on a single, compact, easy-to-use system. A highly versatile platform with the smallest footprint for an instrument of its capabilities, the Dimension® Xpand® System is a good fit for a variety of laboratory settings.

Scenario: Part 1 (Project Signoff)

The project is closing and has provided some deliverables and met some objectives. The items from the original project charter are listed below. Please note that *these may differ* from what actually occurred during the project. Review these lists and the project history on the next page to prepare for project signoff.

Original Project Objectives

- Install one Dimension Xpand Plus Lab Instrument within 120 days of project execution.
- Submit a laboratory workflow assessment for approval.
- Train a minimum of fifteen lab technicians to operate the new instrument.
- Operate at a minimum of 340 tests per minute throughput for the Dimension instrument.
- Enable the X-link component to transmit data.
- Communicate the new diagnostic test procedures to clinicians.
- Present recommendations for continued support and maintenance of the Dimension instrument.

Original Deliverables

- Workflow Assessment Submitted
- Lab Technicians Trained
- X-Link Component Functional
- Dimension Testing Complete
- Dimension Installation Complete
- Updated Lab Procedures Communicated

Scenario: Part 2 (Lessons Learned)

The Project Plan and Charter were approved on 7/20/07. The project adhered to the original timeline and Human Resource, Communication, and Testing plans. However, the Risk Response and Training plans were updated to adapt to project challenges. The project manager and team devoted about 50% more time to the project than expected. Overall, the implementation was successful, except for a one-week delay noted below.

The project manager sent very frequent emails and voice mails to team members. She explained that she wanted to keep them on track because, in her experience, “people seem to drop the ball unless you keep on them.” Some team members heard similar sentiments from the project manager and were unhappy with the number of communications and her “attitude.” This became more apparent as the project proceeded.

All changes described below were approved through Scope Change Control forms.

Overall, the project achieved its objectives and is providing the target benefits. With the success of this project, key team members will be asked to write a case study and begin feasibility studies at several sites in the enterprise. The new clinical diagnostic instrument may be utilized at multiple Nemours sites and will likely involve many of the project team members from this first implementation.

July 2008

The project manager supplied weekly status reports via email. These communications to the project sponsor and team enabled rapid response to risk and changing project conditions. Status reports were especially important in responding to the backup power supply shipment delay in September 2008.

Early on, the project manager noted that the instrument vendor did not promptly return the majority of phone messages. Many of these calls were urgent, yet some were not even returned. The vendor account manager assigned to the project claimed that he did not receive these messages or did not understand their meaning. In addition, the vendor claimed that several messages left for the project manager and the lab liaison were likewise ignored or misinterpreted.

August 2008

On August 26, Dr. Rutherford authorizes the purchase of the StreamLab to replace the Dimension Xpand Plus (see full details in the Executing / Controlling / Monitoring section of this case study). This required the lab to find a different area for the StreamLab and for the installation of new network jacks and power supplies. IS covered the jacks, but the electrical contractor charged \$2,100 to run wires and install electrical outlets.

The first big challenge was the lab router failure on 8/24/07. Unfortunately, the backup router was not yet configured. The project manager conceded that she should have requested this router sooner from IS (Information Systems), as per their original recommendations. However, IS was able to set up the router on 8/24/07 with full operations restored by 20:52.

IS completed the installation and testing of the digital phone line, as well as installed the power backup system. Since the phone line configuration recommended by the vendor did not work, IS needed to purchase and install additional equipment.

Finalizing a Project

About mid-month, the project manager offered monthly Friday-night dinners for the team. Most of the team usually attended and enjoyed discussing the project and sharing a joke or two. These were uniformly respectful and lighthearted gatherings. These dinners did, however consume about \$1,100 in unbudgeted monies.

September 2008

About seven weeks into the project, Frank Holmes had to take three days off to get a home air conditioning system installed. Frank was the liaison with the assay vendor and X-Link software vendor. As a result, Frank did not notify IS or other team members about vendor product changes and delays until he returned from vacation. Biotest Advon, the assay vendor, had several production problems that caused a project delay of one week: there was a brush fire near their San Diego, CA assay manufacturing plant. The missing assays also delayed usability testing, and lost productivity was very significant for lab staff.

Furthermore, Frank did not give the X-Link software update to IS until he had sorted through his mail, two days after he returned. Thus, IS had to work a weekend to meet the project deadline for the X-Link capability.

Testing went very smoothly. During project planning, Gregor McGinn advised the team to have a very representative group of lab users for testing. Input from this group enabled the software to be customized effectively. Staff acceptance appeared to be rapid. Staff were very pleased to be involved in the configuration process. In addition, the Clinical Lab manager worked closely with the instructional designer from the vendor to create training sessions that staff found enjoyable, relevant, and effective. The hands-on emphasis facilitated more rapid learning and transfer of skills to the job.

October 2008

Although the Clinical Lab began using the StreamLab Plus a week later than expected, they were very pleased with its performance. However, the Clinical Lab manager and project manager had to schedule several unexpected maintenance service calls. These vendor services required about \$1,350 in additional fees, but did ensure accurate and efficient performance of the testing unit.

The “Premium Platinum” maintenance contract would have taken care of these services. But, team member Julie Freeman elected to purchase the “Solid Silver” plan for the first 12 months. Since the testing unit requires more maintenance than anticipated by Ms. Freeman, the Clinical Lab will need to budget more funds for operating expenses.

The project received very good press in October: Jim Lardear (AIDHC Public Relations Director) wrote a news release and worked with Medical Photography. Not only was the staff excited by this recognition, but AIDHC has received several inquires from potential health care network partners. Video was released to local media, which ran two segments in the Philadelphia market.

Project Sign-Off

Like all aspects of a project, sign-off is a carefully planned and documented activity. Project closing includes getting official project sign-off from your Sponsor, and the Project Sign-Off form can be found in *Appendix H*.

Small Group Exercise: Sponsor Expectations

Directions: Brainstorm with your group to answer the questions below.

1. How can you ensure ahead of time that you will meet the sponsor’s project expectations and receive project sign-off?



2. What would you do if your project sponsor introduces a new project element during project sign-off (For example – “This was great; let’s implement at another site”)?

Project Sign Off Form

Your Project Charter sets the stage for the Project Sign Off form. You will also be drawing key information from much of your project documentation, so have it handy. This Sign Off form can be found in *Appendix H* and on Project Management Central.

The first section, or header, of the form provides basic contact and approval information. After completing the form, the Project Manager will submit it for approval to the project sponsor.

Project Sign Off Form – Header Section

Project Management @ 			
<h1>Project Sign Off</h1>			
Project Title:			
Project Sponsor:			
Project Manager:			
Submitted by:		Date:	
Approval:	Approved?	Yes __	No __
	Approved By:		

Objectives

List the original project objectives as identified in the Project Charter.

Project Sign Off Form – Objectives

Objectives: <i>List the original project objectives identified in the Project Charter.</i>

Deliverables

List the original project deliverables as identified in the Project Charter.

Project Sign Off Form - Deliverables

Deliverables: <i>List the major tangible items delivered with the project.</i>

Approved Changes

Briefly state each approved project change that was documented through the scope change control process. Be ready to supply the relevant Scope Change Control documents on request from your sponsor.

Project Sign Off Form – Approved Changes

Approved Changes: <i>List the changes approved through the scope change control process.</i>

Project Acceptance

If the sponsor confirms that the objectives and deliverables stated here have been met, check off the Project Acceptance section. This confirmation can be via email, phone, or other communication.

Project Sign Off Form – Project Acceptance

Project Acceptance: <i>Place an "X" in the box below, if applicable.</i>
<input type="checkbox"/> Confirmation from the customer or sponsor has been received that requirements and specifications for the project's product, service, or result, as stated in the objectives and deliverables above, have been met.

Partner Exercise: Project Sign-Off

Directions: Work with your partner to complete the Project Sign-Off form based on the Case Study Scenario Part 1 and Part 2.

Lessons Learned

Lessons Learned Meeting

Now that the project has been signed off and approved by the project sponsor, the next step is to schedule the lessons learned meeting.

During the lessons learned meeting, plan to complete the following activities:

- Review the entire project
- Identify lessons learned
- Develop an action plan to implement the lessons learned

Let your team know you genuinely care about them, the work they've done, and their future success.

—Ron Black, author of *The Complete Idiot's Guide to Project Management with Microsoft Project 2000*

Small Group Exercise: Lessons Learned

Directions: Brainstorm with your group to answer the questions below.

1. Who should participate in the Lessons Learned meeting?

2. When should the Lessons Learned meeting be held? Why?

Lessons Learned Form

Your Lessons Learned meeting will generate useful data that you should document on the Lessons Learned form. The sections of the form mirror the primary discussions of the meeting and should summarize your notes. You can find this form on Project Management Central and *Appendix I*.

Successes

Begin by filling in the basic project information in the form header section, and then record the successes you discussed in the Lessons Learned meeting. Document any project methodology or technique that contributed to the successful outcomes in the project. For example, your team may have found that creating a project web page for key management improved communication with them and garnered support for your work.

During the meeting, be sure to set a tone that encourages participants to share their opinions and insights. The goal is to learn from the project. Don't hesitate to record what you consider to be small details: they may still have a big impact.

Lessons Learned – Header and Successes Sections



Lessons Learned

Project Title:			
Submitted By:		Date:	
Successes: <i>What things went well? What practices would the team repeat?</i>			

Next, it's time to discuss parts or practices of the project that your team believes can be improved. The open and safe tone you set in the discussion of successes will become especially important here. This will be the most difficult part of the discussion and will require all your people skills.

Lessons Learned

Action Plan

Now that you have reviewed your project, list key actions that will address areas for improvement and repeat best practices. For example, you could list “Establish team member monitoring guidelines for projects” and assign this action a due date and a person responsible for completing the action. Many of these actions could grow into full-fledged projects. However, avoid providing too much detail; keep the actions succinct and clear. If they become projects, all the details will be outlined later in those projects.

Lessons Learned – Action Plan

Action Plan: <i>What action items can be taken from this Lessons Learned meeting? Who will be responsible for completing the action?</i>		
Action	Due Date	Person Assigned

Partner Exercise: Lessons Learned Meeting

Directions: Work with your partner to complete the Lessons Learned form based on the Case Study Scenario Part 1 and Part 2.

Archiving Project Documentation

Project Archiving

You and your team worked hard to provide deliverables that should not be lost. As you look back on your project, you may be surprised at how many files, folders, books, and other products you've acquired or created.

Large Group Exercise: Project Archiving

Directions: Work with your class to answer the following question.

Why should you archive all project documentation?

Archive Contents

What types of files should you archive? Some of the most important files are included in the list below:

- Project Charter
- Project Management Plan
 - HR Plan
 - Communication Plan
 - Risk Response Plan
 - Testing Plan
 - Budget Plan
 - Quality Plan
- MS Project plan files
- Proposal
- Scope Change Control Forms
- Status Reports
- Lessons Learned Form
- Project Sign Off Form
- Procurement Plan
- Excel spreadsheets
- Reports
- Images and Graphics
- Deliverables
- Resource Lists
- Surveys
- Transcripts

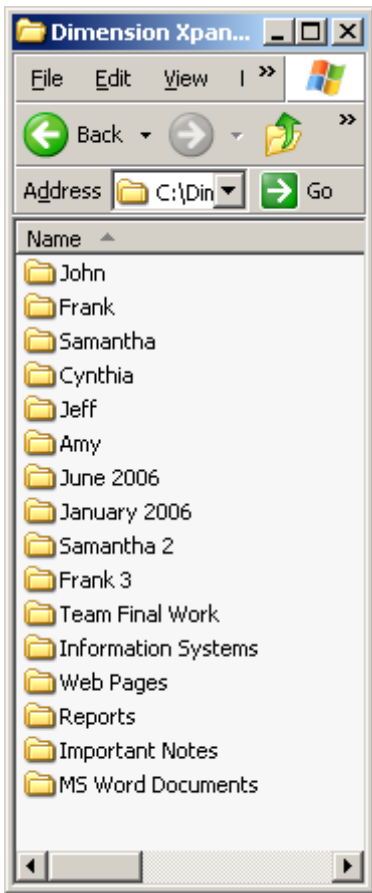
Guidelines for Creating an Archive

As project manager, you will want to follow guidelines or set standards for creating your project archive. Here are some guidelines to consider:

- ✓ Save all useful project information
- ✓ Secure stable storage areas for digital and physical materials
- ✓ Protect archived materials from changes
- ✓ Create an intuitive structure and system
- ✓ Create a backup of the archive

Partner Exercise: Designing an Archive

Directions: Work with your partner to answer the following questions.

	<p>1. Examine the sample folder structure. Would this be an effective project archive? Why, or why not?</p> <p>2. How would you structure a project archive?</p>
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Individual Exercise: Your Project(s)

Directions: Work independently to answer the question below.

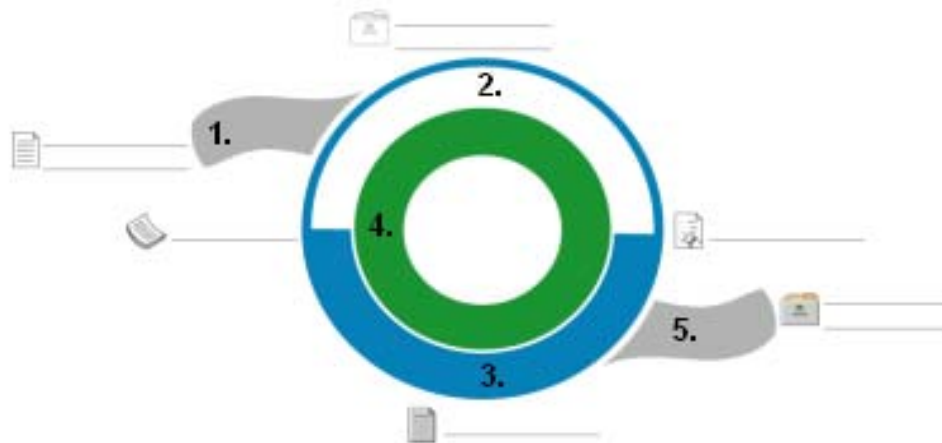
What elements of the Closing process can you incorporate into your current project(s)?

Pulling It All Together

The Project Management @ Nemours curriculum covers many project management concepts, and we have provided you with the foundational skills you will need for managing projects.

Project Management @ Nemours Model

The foundation for the Project Management @ Nemours program is the model used to translate the five processes and supporting templates into a user-friendly method for executing projects on a regular basis.

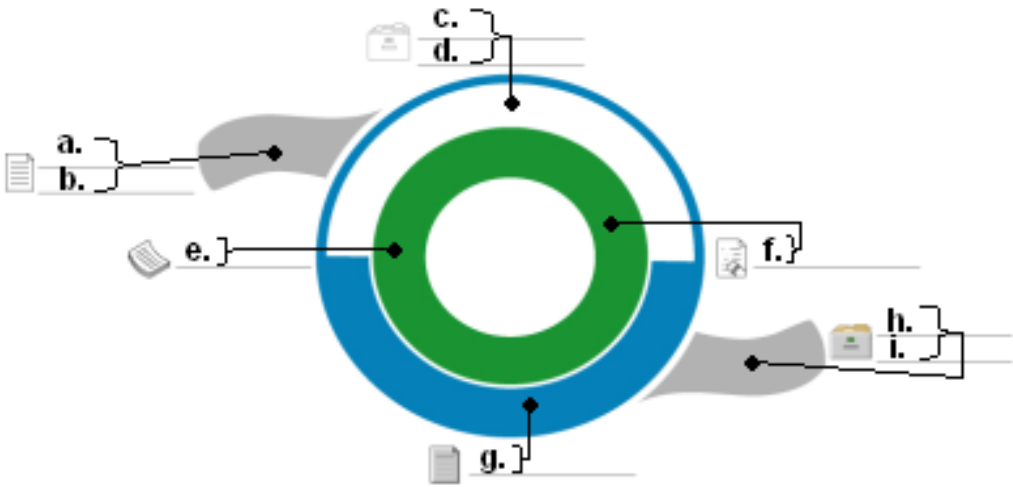


Individual Exercise: Project Management @ Nemours Model

Directions: Using the graphic shown above, answer the following question:

1. Aligning your answers with the numbers on the model, what are the five processes of Project Management @ Nemours?

1. _____
2. _____
3. _____
4. _____
5. _____



2. Aligning your answers with the letters on the model, what templates are associated with each process?

- a. _____
- b. _____
- c. _____
- d. _____
- e. _____
- f. _____
- g. _____
- h. _____
- i. _____

Pulling It All Together

Implementing Project Management

Throughout the Project Management @ Nemours curriculum, we hope you identified opportunities to translate project management concepts into real on-the-job approaches you can apply to your next project.

Individual Exercise: Your Project

Directions: Review the elements you documented at the end of each process that you could apply to your current project(s). Answer the below question.

What key points did you document that you can apply to your current project(s)?

Next Steps

Interested in project management? Ready to take it to the next level? Below are some possible next steps:

- Pursue Nemours Certified Project Professional (NCP) Certification
- Consult Project Management Central for additional internal and external resources
- Get involved! Coach and mentor other Nemours Associates