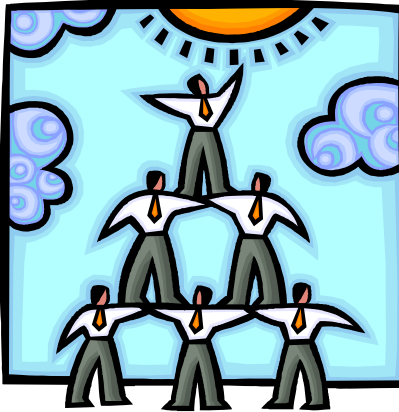Closing the Project
Module 11

11-1

Instructor Notes

This module refers to pages 63-64 in the Learning Log.
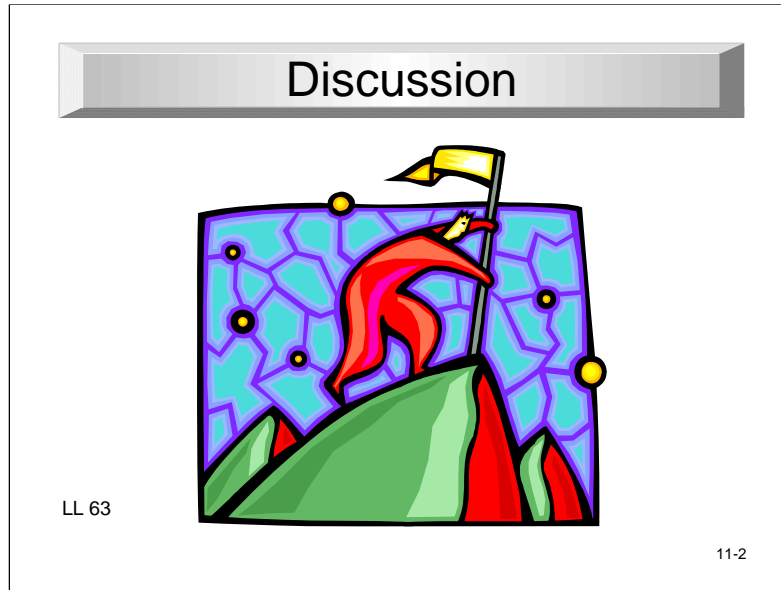
Module 11 Timing

This module lasts for 15 minutes, 15:15 - 15:30, on day 3. The agenda is:

Start	End	Length	Subject
15:15	15:30	15	Discussion

The objectives of this module in Project Management Orientation were:

- Describing the purpose of closing the project
- Identifying closing activities
- Preparing a project evaluation report
- Developing and applying lessons learned on future projects
- Accessing the PM Knowledge Network

Facilitate a discussion covering topics such as:

What are the activities that should take place when closing a project?

- Reviewing the agreement and the project documentation to confirm that all project deliverables have been met.
- Formally closing the project with both the sponsor and the suppliers
- Preparing a project evaluation report
- Releasing staff and technical environments
- Releasing suppliers

Why is closing the project important?

What gets in the way of closing the project?

When should closing start?

Who should be involved in closing the project?

Answer questions the participants have about PM Orientation

Additional questions that should be asked when closing the project:

Have all required products and services been provided to the sponsor?

Have all actions related to contract changes or revisions been concluded?

Have all contractual issues been settled?

Have all ongoing maintenance requirements been addressed and agreed to?

Is documentation in place that adequately shows the receipt and formal acceptance of all contract deliverables?

Has any property or information provided by the sponsor been returned?

Has the final invoice been submitted and paid?

Has the project file been updated and is it completely up-to-date?

Have you gathered lessons learned from the sponsor, suppliers, and your teams?

Has the project team determined whether any project material should be nominated for inclusion in IBM's Intellectual Capital Management (ICM) database?

Has a sponsor satisfaction survey been conducted?

Have the technical environment elements been released?

PM's Responsibilities

Assess the terms of agreement and the completion of all commitments.

- Review the terms of the project plan and the sponsor agreement and verify the completeness of all deliverables and the currency of all documentation.
- Verify that all supplier agreements have been fulfilled and closed.
- Verify the satisfaction of post-delivery commitments, such as readiness to fulfill warranty and support obligations.

Release the technical environment.

- Identify and release technical environment elements, such as office space, computer installations, and related software.
- Equipment or space needed for warranty support can be left in place after the project closes

11-3

Remind participants of the PM's responsibilities if they were not covered in the discussion.

PM's Responsibilities

Obtain sponsor feedback.

Obtain information about the sponsor's areas of satisfaction and dissatisfaction, then document this information and use it as input to the lessons learned.

Assess the lessons learned.

Determine the key lessons learned on the project, document them, and suggest improvements for future projects in the project evaluation report.

Close out the sponsor agreement.

Perform the administrative closure of the sponsor agreement. This includes generating, gathering, and disseminating information to formalize project completion and closure.

Submit the intellectual capital.

Submit all intellectual capital generated on the project, including lessons learned, the WBS, project definition reports, and any other related documentation to the ICM AssetWeb. Current and future projects will benefit from your experienc

11-4

PM's Responsibilities

Final Project Meetings and Reviews

Project review. Conduct a project review with the sponsor shortly before the project ends to ensure that:
*   All contractual obligations have been met by the supplier to IBM and by IBM to the project sponsor
*   The project sponsor formally accepts the project as being complete
*   All assets on loan to the supplier or the sponsor have been returned
*   Everything is ready and in place to close the project

Lessons learned meetings. To identify key lessons on the project, conduct lessons learned meetings with the internal team, the sponsor, and your suppliers. How to conduct lessons learned meetings is discussed in "12.3 Lessons Learned."

Final internal review. After the project is closed, conduct a final internal review of the project to identify and submit any intellectual capital developed on the project

11-5