Where We Are Now

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- Project networks 6
- Schedule resources & costs 8
- Define project 4
- Managing risk 7
- Reducing duration 9
- Monitoring progress 13
- Project closure 14

Subtopics:
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- Organization 3
- Strategy 2
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Project Closure and Review Deliverables

Wrap-up closure activities
- Facilities
- Customer
- Vendors
- Report

Performance evaluation
- Team evaluation
- Individual evaluations

Retrospectives
- Facilitator
- Managing
- Utilization
- Team

Project archives/database

FIGURE 14.1
Project Closure

• Types of Project Closure
  – Normal
  – Premature
  – Perpetual
  – Failed Project
  – Changed Priority

• Close-out Plan: Questions to be Asked
  – What tasks are required to close the project?
  – Who will be responsible for these tasks?
  – When will closure begin and end?
  – How will the project be delivered?
## Wrap-up Closure Checklist

<table>
<thead>
<tr>
<th>Task</th>
<th>Completed?</th>
<th>Yes/No</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Team</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1 Has a schedule for reducing project staff been developed and accepted?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2 Has staff been released or notified of new assignments?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3 Have performance reviews for team members been conducted?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4 Has staff been offered outplacement services and career counseling activities?</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Vendors/contractors</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5 Have performance reviews for all vendors been conducted?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6 Have project accounts been finalized and all billing closed?</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Customer/Users</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7 Has the customer signed-off on the delivered product?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8 Has an in-depth project review and evaluation interview with the customer been conducted?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>9 Have the users been interviewed to assess their satisfaction with the deliverables? With the project team? With vendors? With training? With support? With maintenance?</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Equipment and facilities</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10 Have project resources been transferred to other projects?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11 Have rental or lease equipment agreements been closed out?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>12 Has the date for the closure review been set and stakeholders notified?</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Attach comments or links on any tasks you feel need explanation.*
Implementing Project Closedown

1. Getting delivery acceptance from the customer.
2. Shutting down resources and releasing them to new uses.
3. Evaluating the team, team members and the project manager; and reassigning project team members.
4. Closing accounts and paying all bills.
5. Delivering the project to the customer.
6. Creating a final report.
Creating the Final Report

• Executive Summary
  – Project goals met/unmet
  – Stakeholder satisfaction with project
  – User reactions to quality of deliverables

• Review and Analysis
  – Project mission and objective
  – Procedures and systems used
  – Organization resources used

• Recommendations
  – Technical improvements
  – Corrective actions

• Lessons Learned
  – Reminders
  – Retrospectives

• Appendix
  – Backup data
  – Critical information
Project Performance Evaluations

• Reasons for Poor-Quality Project Performance Evaluations:
  – Evaluations of individuals are left to supervisors of the team member’s home department.
  – Typically measure team performance only on time, cost, and specifications.
1. Are standards and goals for measuring performance clear, challenging, and attainable? Lead to positive consequences?

2. Are responsibilities and performance standards known by all team members?

3. Are team rewards adequate? Management believes teams are important?

4. Is there a career path for successful project managers?

5. Does the team have discretionary authority to manage short-term difficulties?

6. Is there a high level of trust within the organization culture?

7. Are there criteria beyond time, cost, and specifications?
Sample Team Evaluation and Feedback Survey

Using the scale below, assess each statement.

1. The team shared a sense of common purpose, and each member was willing to work toward achieving project objectives.

2. Respect was shown for other points of view. Differences of opinion were encouraged and freely expressed.

3. All interaction among team members occurred in a comfortable, supportive atmosphere.

<table>
<thead>
<tr>
<th>Disagree</th>
<th>Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>5</td>
<td></td>
</tr>
</tbody>
</table>

**TABLE 14.2**
Project Performance Evaluation: Individual

• **Performance Assessment Responsibilities:**
  
  – Functional organization or functional matrix: the individual’s area manager.
    
    • The area manager may solicit the project manager’s opinion of the individual’s performance on a specific project.
  
  – Balanced matrix: the project manager and the area manager jointly evaluate an individual’s performance.
  
  – Project matrix and project organizations: the project manager is responsible for appraising individual performance.
Conducting Performance Reviews

• Begin by asking the individual to evaluate his or her own performance.

• Avoid drawing comparisons with other team members; rather, assess the individual in terms of established standards and expectations.

• Focus criticism on specific behaviors rather than on the individual personally.

• Be consistent and fair in treatment of all team members.

• Treat the review as one point in an ongoing process.
Individual Performance Assessment

- Multiple rater appraisal ("360-degree feedback")
  - Involves soliciting feedback concerning team members’ performance from all of the people that their work affects.
- Project managers, area managers, peers, subordinates, and customers.
Retrospectives

• Lessons Learned
  – An analysis carried out during and shortly after the project life cycle to capture positive and negative project learning—“what worked and what didn’t?”

• Goals of Retrospectives
  – To reuse learned solutions
  – To stop repetitive mistakes
Retrospectives (cont’d)

• Barriers to Organizational Learning
  – Lack of post-project time for developing lessons
  – No post-project direction or support for teams
  – Lessons become blame sessions
  – Lessons are not applied in other locations
  – Organizational culture does not recognize value of learning
The Value of Retrospective Analyses

• Making Retrospectives Effective:
  – Use an independent facilitator to guide the project team through the analysis project activities.
  – Include a minimum of three in-process learning gates during the life project cycle.
  – Designate a team member as owner for each point in the retrospective.
  – Develop an easy-to-use learning repository to ensure future utilization of retrospective lessons.
  – Mandate use of retrospectives as part of the normal process for all projects.
Characteristics of a Closure Facilitator

1. No direct involvement or direct interest in the project.
2. Perceived as impartial and fair.
3. Respect of senior management and other project stakeholders.
4. Willingness to listen.
5. Independence and authority to report audit results without fear of recriminations from special interests.
6. Perceived as having the best interests of the organization in making decisions.
7. Broad-based experience in the organization or industry.
Initiating the Retrospective Review

• Have automatic times or points when audits will take place. Avoid surprises.
• Conduct audits carefully and with sensitivity.
• Audit staff must independent from the project.
• Audit reports need to be used and accessible.
• Audits support organizational culture.
• Project closures should be planned and orderly.
• Certain “core conditions” must be in place to support team and individual evaluation.
• Conduct individual and team evaluations separate from pay or merit reviews.
The Retrospectives Process

FIGURE 14.2

[Diagram showing the process of project life cycle with stages such as Project plan, Retro gate 1, Retro gate 2, End gate, and a library of Retrospectives with Retro 1, Retro 2, Retro 3, and Retro n.]

Organizational learning culture
Conducting a Retrospective Analysis

• Initiation and staffing
• Data collection and analysis
• Reporting
1. Were the project objectives and strategic intent of the project clearly and explicitly communicated?
2. Were the objectives and strategy in alignment?
3. Were the stakeholders identified and included in the planning?
4. Were project resources adequate for this project?
5. Were people with the right skill sets assigned to this project?
6. Were time estimates reasonable and achievable?
7. Were the risks for the project appropriately identified and assessed before the project started?
8. Were the processes and practices appropriate for this type of project? Should projects of similar size and type use these systems? Why/why not?
10. Were communication methods appropriate and adequate among all stakeholders? Explain.
11. Is the customer satisfied with the project product?
12. Are the customers using the project deliverables as intended? Are they satisfied?
13. Were the project objectives met?
14. Are the stakeholders satisfied their strategic intents have been met?
15. Has the customer or sponsor accepted a formal statement that the terms of the project charter and scope have been met?
16. Were schedule, budget, and scope standards met?
17. Is there any one important area that needs to be reviewed and improved upon? Can you identify the cause?

**TABLE 14.3**
1. Was the organizational culture supportive for this type of project?
2. Was senior management support adequate?
3. Were people with the right skills assigned to this project?
4. Did the project office help or hinder management of the project? Explain.
5. Did the team have access to organizational resources (people, funds, equipment)?
6. Was training for this project adequate? Explain.
7. Were lessons learned from earlier projects useful? Why? Where?
8. Did the project have a clear link to organizational objectives? Explain.
9. Was project staff properly reassigned?
10. Was the Human Resources Office helpful in finding new assignments? Comment.
Archiving Retrospectives

• Classifying of Projects:
  – Project type
  – Size
  – Staffing
  – Technology level
  – Strategic or support
  – Issues and problems
  – Project mission and objectives
  – Procedures and systems used
  – Organization resources used
Key Terms

Lessons learned
Performance review
Project closure
Project evaluation
Project facilitator
Retrospective
Team evaluation
360-degree review
Appendix 14.1

Project Closeout Checklist
<table>
<thead>
<tr>
<th></th>
<th>Item</th>
<th>Status</th>
<th>Comments/Plan to Resolve</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Have all the product or service deliverables been accepted by the customer?</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>1.1</strong> Are there contingencies or conditions related to the acceptance? If so, describe in the Comments.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Has the project been evaluated against each performance goal established in the project performance plan?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Has the actual cost of the project been tallied and compared to the approved cost baseline?</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>3.1</strong> Have all approved changes to the cost baseline been identified and their impact on the project documented?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Have the actual milestone completion dates been compared to the approved schedule?</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>4.1</strong> Have all approved changes to the schedule baseline been identified and their impact on the project documented?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Have all approved changes to the project scope been identified and their impact on the performance, cost, and schedule baselines documented?</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

(Continued)
Appendix 14.2

Euro Conversion—Project Closure Checklist
# Euro Conversion—Project Closure Checklist

<table>
<thead>
<tr>
<th>Task</th>
<th>Due Date</th>
<th>Person Responsible</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Document finance department acceptance</td>
<td>16/12</td>
<td>Hans</td>
<td></td>
</tr>
<tr>
<td>Customer training in Euro software</td>
<td>28/12</td>
<td>Joan</td>
<td>Train all departments before conversion</td>
</tr>
<tr>
<td>Archive all</td>
<td>31/12</td>
<td>Maeyke</td>
<td></td>
</tr>
<tr>
<td>Schedules/actuals</td>
<td>31/12</td>
<td>Maeyke</td>
<td></td>
</tr>
<tr>
<td>Budgets/actual costs</td>
<td>31/12</td>
<td>Maeyke</td>
<td></td>
</tr>
<tr>
<td>Changes</td>
<td>31/12</td>
<td>Maeyke</td>
<td></td>
</tr>
<tr>
<td>Close out all accounts with vendors</td>
<td>31/12</td>
<td>Guido</td>
<td></td>
</tr>
<tr>
<td>Close out all work orders</td>
<td>31/12</td>
<td>Mayo</td>
<td></td>
</tr>
<tr>
<td>Close out partner accounts</td>
<td>31/12</td>
<td>Guido</td>
<td></td>
</tr>
<tr>
<td>Reassign project staff</td>
<td>16/12</td>
<td>Sophie</td>
<td></td>
</tr>
<tr>
<td>Evaluation of Vendors</td>
<td>31/12</td>
<td>Mayo</td>
<td>Use standard questionnaire for vendors</td>
</tr>
<tr>
<td>Evaluation of Staff members</td>
<td>31/12</td>
<td>Sophie</td>
<td>Have HR department develop and administer</td>
</tr>
<tr>
<td>Final report and lessons learned meeting</td>
<td>4/1</td>
<td>Hans</td>
<td>Send notice to all stakeholders</td>
</tr>
<tr>
<td>Lessons learned archive to database</td>
<td>10/1</td>
<td>Maeyke</td>
<td>Contact IS department</td>
</tr>
</tbody>
</table>

Notify all stakeholders