# Project Completion Template

This template serves as a general guide for project completion. Select actions appropriate to your project’s purpose and size.

## Steps:

1. Review remaining tasks and responsibilities
2. Review documentation
3. Transfer responsibility and ownership
4. Review and verify project deliverables have been met
5. Close project
6. Conduct post-project retrospective and celebration

### Responsibilities

#### Outcome

* All significant post-project tasks and ongoing responsibilities identified
* New owners assigned

#### Process

Create list of actions and roles that will be transferred from project team to other people or groups as an ongoing responsibility when project is dissolved. Use a RACI chart to establish who will be Responsible, Accountable, Consulted and Informed.

Categories depend on project type, but may include:

* Service ownership (including vendor relationship management, SLA, prioritization of issues, ROI)
* Funding (who will receive/pay bills, handle funding requests)
* Support (for incidents, service requests, change requests)
* Ongoing training
* Release testing
* Development
* Maintenance

### Documentation Review

#### Outcome

* Documentation identified and created for any post-project responsibilities to be transitioned

#### Process

Complete whatever documentation is required to close project and transition long-term responsibilities. This may include

* Service
  + Service definition/description (include hours, SLA, request/support path, as appropriate)
  + Vendor contact information
  + Outage communication process
  + Billing schedule and indexes
* Support resources
  + Request forms
  + Common requests/problems and solutions
  + Terminology
  + Escalation paths
  + Vendor support instructions
* Development resources
  + Request forms
  + Technical information
  + Configuration and integration specs
  + Testing information
* Maintenance resources
  + Maintenance windows
  + Release testing process

### Transfer of Responsibility

#### Outcome

* Recipients understand responsibilities transitioned to them
* Recipients review and take ownership of documentation, including future updates

#### Process

Meet with groups receiving responsibilities

1. Confirm information on RACI charts
2. Verify necessary documentation has been provided
3. Discuss any upcoming actions or items to be addresses after project completes

Contact vendor to update contact name(s) for service questions/requests and billing

### Deliverables

#### Outcome

* All project deliverables reviewed and agreement reached on their completion.

#### Process

With sponsor, review list of deliverables from Project Data Sheet and confirm that each one has either been addressed, is no longer needed, or that it will continue to be worked on after the project is formally completed.

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|  | Outcome | | |  |
| Project Deliverable | Completed | Eliminated | To be addressed outside of project | Notes |
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### Close Project

Gain agreement from sponsor that project can be closed.

Notify project team and cancel future team meetings.

Mark project “completed” in next project review. After project review, hide project from project list.

Post-project retrospective and celebration

#### Outcome

* Participants thanked
* Project revisited and accomplishments reviewed
* Feedback gathered to improve future project success

#### Process

Thank project participants for the work they performed. This could be anything from a simple thank you to an elaborate party—just be sure to acknowledge hard work.

Review the major steps and milestones of the project, and any useful metrics.

Gather feedback about the project intake, planning and execution from the people involved in project execution. You may use a retrospective survey or simply ask for input at a team meeting.

Collect the feedback to improve future project success.