

Closing a Project

The final phase of a project is a unique moment — it is simultaneously a phase closure *and* the closure of the entire project. This dual nature creates complexity that demands careful, deliberate management across every closure domain.

ISO 21502 FRAMEWORK

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The Dual Nature of Final Phase Closure

What Happens at Every Phase Gate

- Acceptance verification of deliverables
- Transition of completed scope
- Performance evaluation
- Resource release
- Administrative closure activities

The Final Phase Challenge

At the end of the final phase, it is not always easy to determine which closing activities belong to the phase and which belong to the project as a whole. The two closures overlap significantly – the same meetings, reviews, and reports serve both purposes simultaneously.

Understanding this dual nature is essential for ensuring nothing is missed and that all obligations – to the phase and to the project – are properly discharged.

Acceptance, Transition & Deliverable Evaluation

The final phase delivers the last piece of the project's scope – for example, user training on how to use the project solution. But this delivery carries a **dual obligation**: it must satisfy both the phase deliverable requirements *and* the acceptance criteria for the project's complete product.

Phase Deliverable

The specific work product of the final phase – e.g., successful training sessions – must meet the phase acceptance criteria defined at phase planning.

Project Key Deliverable

The complete solution must satisfy all functional requirements and quality attributes of the project's overall product. Product review meetings must confirm end-to-end solution integrity.

Integrated Review

The final product review must demonstrate that *both* the phase deliverable and the full project solution meet requirements. A single review session typically covers both dimensions simultaneously.

Measuring Schedule & Cost Performance at Project End

Earned Value Analysis (EVA) is a powerful monitoring tool – but it loses much of its value at project end. Understanding *why* helps project managers choose the right performance metrics for the closure report.

Why EVA Falls Short at Project End

- Earned Value (EV) and Planned Value (PV) both equal 100% if the solution was delivered
- Schedule Variance (SV) is always zero – even if the project finished late
- Schedule Performance Index (SPI) is always 1 – regardless of actual delays
- EVA's strength is as an **early trend indicator**, not an end-state metric

Best Practice: Use the Baselines

Compare **actual delivery date** to the schedule baseline and **actual costs** to the cost baseline. The Cost Performance Index (CPI) remains valid: if BAC = €100 and actual costs = €140, $CPI = 0.71$, accurately reflecting the cost overrun.

- ❑ If baselines were updated via approved change control, decide whether to compare against the original or latest baseline – and be prepared to explain the difference.

The Politics of Baseline Comparisons

"Project X was completed with a cost overrun of 400% compared to its initial budget, and three years later than planned."

This type of public narrative — common in government-funded projects — compares actual outcomes to **original baselines**, regardless of approved changes along the way. Even when baselines were legitimately updated through change control, the optics can be damaging.

The Project Manager's Reality

Sponsors rarely accept public responsibility for project failures. The project manager — especially one who inherited a troubled project — is typically the one held accountable. Political skill becomes as important as technical skill in these situations.

Key Lesson

Document every approved change, its rationale, and its baseline impact meticulously throughout the project. At closure, the ability to trace deviations to approved decisions is your strongest defense and your clearest path to demonstrating true performance.

Stakeholder Satisfaction & Lessons Learned



Stakeholder Satisfaction Surveys

For stakeholders active throughout the project, combine the phase and project satisfaction surveys into one. For those engaged only in the final phase, the survey is purely a phase closure activity. Tailor distribution accordingly.



Phase-Specific Lessons Learned

Collect lessons tied to the unique work of the final phase — e.g., user training delivery, go-live support. These won't improve subsequent phases, but they build organizational knowledge for future projects executing similar activities.



Project-Wide Lessons Distillation

Gather all lessons collected at prior phase closures. At project end, the primary task is synthesizing the most important insights with a full-project perspective — identifying patterns and themes that only become visible across the entire lifecycle.

The Project Closure Report

The closure report is the definitive record of the project's performance and outcomes. It consolidates all evaluation domains into a single, authoritative document.

1

Objectives Achievement

Degree to which scope, schedule, and cost objectives were met against defined success criteria.

2

Schedule & Cost Performance

Comparison of actual delivery date and costs against the relevant baselines, with explanation of any variances.

3

Stakeholder Satisfaction

Summary of satisfaction survey results across all key stakeholder groups involved in the project.

4

Lessons Learned Summary

Distilled insights from all phase closures, highlighted with project-wide perspective for organizational benefit.

5

Follow-Up Activities

Optional requirements deferred to future projects, open issues, and any actions required by the new owner of the key deliverable.

Administrative Closure: Resource Release & Archiving

Administrative closure at the end of the final phase carries a dual identity: conceptually, these activities belong to phase closure, even when they also mark the end of the entire project.

Phase Closure Administrative Activities

- Release resources and team members engaged in the final phase
- Resolve any outstanding claims with suppliers or contractors
- Conduct performance evaluations for phase team members
- Update and finalize all project logs
- Archive phase documentation

Project Closure Administrative Activities

- Release resources and suppliers engaged across the full project lifecycle
- Consolidate and cleanse all project files
- Transfer complete archive to the appropriate organizational repository

Important Distinction

Resources and suppliers involved throughout the entire project are released as a **project closure** activity – but this does not preclude evaluating them at the end of each preceding phase as well. Both dimensions of closure can and should coexist.

Was the Project a Success?

Two critical questions must be answered at project end. The answers require revisiting the **project charter** – the foundational document that defines success criteria and original business requirements.



Was the
Project a
Success?

Is More Work
Needed?

A well-delivered scope does not automatically mean a successful project. If the scope was poorly defined from the start – creating a mismatch between the key deliverable and the business capabilities the organization sought – the project may have been executed perfectly yet still failed to deliver full organizational value. Scope definition quality is as critical as scope delivery quality.

Benefits Realization: A Double-Edged Sword

Benefits verification is the final — and most sensitive — dimension of project success. How the project charter defines expected benefits determines who bears responsibility for measuring them.

Benefits Realized at Delivery

Some benefits are measurable immediately upon project completion — e.g., a doubling of transaction speed measured with a representative client sample. These can reasonably be assessed during project closure.

Benefits Realized Over Time

Many benefits — sales growth, customer loyalty, mortality reduction — only materialize well after project end. Holding the project manager accountable for these outcomes is neither fair nor practical.

Responsibility Allocation

For long-horizon benefits, responsibility shifts to the **program manager or sponsor**. This underscores why a well-structured project charter — clearly defining benefit ownership and measurement timelines — is so critical from day one.

- 📄 The project charter is your shield at project end. A well-crafted charter protects the project manager from being held responsible for benefits that fall outside the project's scope and timeline.

Congratulations – You've Reached Project Closure! 🎉

You have now completed the full journey from project initiation through to final closure. Mastering the nuances of closing the last phase and the project as a whole is a hallmark of an experienced project manager.

Key Takeaway #1

Final phase closure and project closure are deeply intertwined – manage both dimensions explicitly and intentionally.

Key Takeaway #2

Use schedule and cost baselines – not EVA – to measure performance at project end. Know how to defend your baseline comparisons.

Key Takeaway #3

A successful project delivers well-defined scope – not just well-executed scope. Scope definition quality is a shared accountability from day one.

Key Takeaway #4

The project charter is your anchor at closure. Its quality determines how clearly success – and benefit realization responsibility – can be assessed.