



30 Project Closure Best Practices

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PROJECT MANAGEMENT COLLECTION

30 Project Closure Best Practices



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1



PLAN CLOSURE FROM THE START



Define how the project or phase will be brought to an authorized and orderly end.

① PURPOSE & VALUE

Plan closure early to define how the project or phase will be brought to an authorized and orderly end, aligned with objectives and stakeholders.



CLARITY: Sets clear closure goals, scope and success criteria.



ALIGNMENT: Prepares stakeholders for handover, transition and final acceptance.



READINESS: Ensures work, documentation and resources are in place for closure.



VALUE: Supports a smooth end, protects benefits and enables informed decisions to close or continue.

② HOW TO APPLY

Include the key closure elements in your plan and scale the approach to the delivery lifecycle.



1 DEFINE ACCEPTANCE:
Set what must be delivered and the evidence required for formal acceptance.



2 PLAN TRANSITION:
Arrange handover to operations or next phase, including knowledge transfer.



3 FINANCIAL RECONCILIATION:
Plan final payments, settle liabilities and close contracts.



4 RECORDS:
Archive documents, data and lessons learned for future use.



5 RESPONSIBILITY TRANSFER:
Assign final ownership for deliverables, assets and ongoing obligations.

③ INPUTS & EVIDENCE



PROJECT DOCUMENTS:
Scope, requirements, plans, contracts and change records showing what was agreed.



ACCEPTANCE EVIDENCE:
Completed deliverables, test results, inspection records and stakeholder sign-off.



TRANSITION EVIDENCE:
Operator training records, handover checklists and operational readiness confirmation.



FINANCIAL RECORDS:
Invoices, payment records, contract closure documents and confirmation of settled liabilities.



RECORDS & ASSETS:
Finalized documentation, data archives and asset registers.



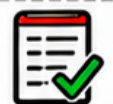
OWNERS:
Project manager, sponsor, customer, operations owner, finance and legal as appropriate.

④ PRACTICAL EXAMPLE

Illustrative: A delivery plan for a new system includes operator training and acceptance evidence before the final release milestone.



PLAN: Schedule training, user guides and acceptance testing before final release.



EVIDENCE: Capture training attendance, test results and user sign-off.



TRANSITION: Handover the system and knowledge to the operations team.



CLOSE: Settle final invoices and archive project records after acceptance.

⑤ PITFALLS & LIMITS



TOO LATE:
A checklist introduced at the last meeting cannot create missing readiness.



INSUFFICIENT RESOURCES:
Closure activities need time, people and budget.



INCOMPLETE SCOPE:
Unfinished work, unresolved defects or open change requests can delay closure.



UNCLEAR OWNERSHIP:
No named owner for handover, records or financial closure can create gaps.



CHANGING CONDITIONS:
Scope or stakeholder needs may change, requiring updates to the closure plan. This card does not replace organizational policies.

⑥ ACTIONS & OUTPUTS



MAINTAIN A CLOSURE PLAN:
List activities, owners, required evidence and decision dates.



ENGAGE STAKEHOLDERS:
Review and confirm closure criteria and responsibilities with key parties.



UPDATE PLAN:
Keep the closure plan current as scope, risks and conditions change.



MONITOR PROGRESS:
Track completion of closure activities and resolve open items.



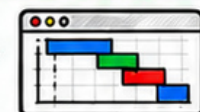
OUTPUTS:
An updated closure plan, evidence of completion, transferred ownership, reconciled finances and archived records ready for formal project closure.



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DEFINE CLOSURE CRITERIA



Agree the conditions that must be satisfied before the relevant authority can close the project or phase.

1 PURPOSE & VALUE

Defines the conditions that must be met before the project or phase can be formally closed by the relevant authority.



CLARITY:

Sets a shared, objective finishing line for closure.



ALIGNMENT:

Ensures all stakeholders agree on what complete looks like.



READINESS:

Confirms deliverables, benefits and handovers are acceptable.



VALUE:

Reduces rework and disputes and enables a smooth transition to business as usual.

2 HOW TO APPLY

Define clear, measurable closure criteria for the project or phase.

1



List required deliverables and acceptance decisions.

2



Define how acceptance will be confirmed.

3



Specify disposition of residual work (e.g. close, transfer or cancel).

4



Confirm financial status (e.g. costs closed, invoices settled, final budget position).

5



Define record location and who will own and maintain the records.

6



Assign receiving responsibilities for ongoing items and benefits realization.

3 INPUTS & EVIDENCE



SCOPE EVIDENCE:

Completed deliverables, acceptance records and quality sign-off.



REQUIREMENTS EVIDENCE:

Confirmation that contractual, technical and business requirements are met or formally waived.



RESIDUAL WORK DETAILS:

List of remaining items, proposed disposition and approved owners.



FINANCIAL INFORMATION:

Final cost report, open invoices status and confirmation of budget closure.



RECORDS & OWNERS:

Location of project records and named owner for ongoing maintenance.



APPROVAL AUTHORITY:

Sponsor or other designated decision maker for formal closure.

4 PRACTICAL EXAMPLE

Illustrative: A phase can close after its deliverables are accepted and two minor items are transferred to a funded support backlog with approved owners.



DELIVERABLES:

All phase deliverables accepted by the customer.



RESIDUAL WORK:

Two minor items transferred to support backlog with approved owners and target dates.



FINANCIAL:

All invoices settled and final budget position confirmed.



RECORDS:

Project records stored in the agreed repository with a named owner.

5 PITFALLS & LIMITS



BLOCKING VS EXCEPTIONS:

Clearly distinguish mandatory closure conditions from authorized exceptions.



NOT PERFECTION:

Closure does not require a flawless outcome. Some low-risk items may be accepted as residual work.



NOT A CALENDAR DATE:

A planned date alone is not a closure criterion. Closure depends on meeting the agreed conditions.



SCOPE DEPENDENT:

Criteria will vary by project or phase. There is no universal list that fits every situation.



ONGOING RESPONSIBILITY:

Unclear owners or handover arrangements can leave items unresolved and create future risk.

6 ACTIONS & OUTPUTS



DEVELOP CRITERIA:

Create and document the closure criteria with clear acceptance conditions and responsibilities.



REVIEW & AGREE:

Discuss and confirm the criteria with the sponsor, customer and receiving owners.



ASSESS EVIDENCE:

Check that all required evidence is available and meets the agreed closure criteria.



AUTHORIZE CLOSURE:

Obtain formal approval from the relevant authority.



RETAIN CLOSURE BASIS:

Keep the approved criteria, evidence and approval record in the project records.



OUTPUTS:

Documented closure criteria, acceptance record, residual-work disposition, and record location with owners.



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RECONCILE THE DELIVERABLE REGISTER



Verify that every agreed deliverable has a clear final status and disposition.

1 PURPOSE & VALUE

Confirm that all agreed deliverables have been produced, accepted or formally removed, with a clear final disposition. Reconcile the register with the approved scope and changes.



CLARITY: Shows what was actually delivered, accepted or excluded.



ASSURANCE: Confirms scope is complete and agreed.



TRACEABILITY: Maintains a clear audit trail for decisions.



CLOSURE READINESS: Provides a reliable basis for formal project closure.

2 HOW TO APPLY



Start with the approved scope and the deliverable register.



Include all approved changes and exclusions.



Compare planned deliverables with what was actually delivered.



Confirm acceptance status and final disposition for each item.



Investigate and resolve any unmatched or unclear items.



CONTROL:

Every deliverable must have a traceable final status, even if removed.

3 INPUTS & EVIDENCE



SCOPE DOCUMENTS:

Approved scope, requirements and deliverable register.



CHANGE RECORDS:

Approved change requests affecting deliverables and reasons.



DELIVERY EVIDENCE:

Completed work products, test results and handover records.



ACCEPTANCE RECORDS:

Customer or sponsor acceptance sign-offs and defect closure.



KEY OWNERS:

Project manager, product owner, customer/sponsor and work-package owners provide and validate records.



EXCLUSIONS:

Evidence of deliverables formally removed from scope.

4 PRACTICAL EXAMPLE

Illustrative: A deliverable register lists twelve deliverables at closure.



Accepted:	10 deliverables
Formally removed:	2 deliverables
Total:	12 deliverables

All twelve items have a traceable disposition. The two removed items are linked to approved change requests, so the final register shows a complete and agreed outcome.



INTERPRETATION:

The register demonstrates that all deliverables are either accepted or formally removed, with no open items.

5 PITFALLS & LIMITS



TASKS ≠ DELIVERABLES:

A completed task list does not prove deliverable acceptance.



MISSING EVIDENCE:

Delivered work without acceptance records leaves the status unclear.



DELETED WORK:

Removed deliverables should not disappear from the register or audit trail.



UNRESOLVED GAPS:

Unmatched or ambiguous items delay closure and can cause disputes.



PROJECT SPECIFIC:

Definitions, evidence and acceptance criteria depend on the project and contract terms.

6 ACTIONS & OUTPUTS



RECONCILE:

Review each deliverable and confirm the final status and disposition.



RESOLVE GAPS:

Investigate and agree outcomes for any missing, unclear or unmatched items.



AGREE & SIGN OFF:

Obtain acceptance from the appropriate owner for each deliverable.



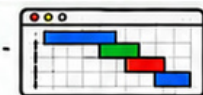
PUBLISH OUTPUT:

Issue a final reconciled deliverable register with status, disposition and supporting references.



SUPPORT CLOSURE:

Use the reconciled register as input to the project closure decision and final report.



The All-in-One PM Templates Bundle

940+ Premium Templates • One Payment • Lifetime Access

\$49

SAVE 94%

Worth \$3,300+



EXCEL & GOOGLE
SHEETS



PROFESSIONAL
& RELIABLE



AUTOMATED
DASHBOARDS



SAVE TIME &
STAY ON TRACK



INSTANT ACCESS
DOWNLOAD

GET LIFETIME ACCESS

COMPLETE ACCEPTANCE EVIDENCE



Assemble reliable evidence showing whether agreed acceptance conditions have been met.



1 PURPOSE & VALUE

Confirms that deliverables meet the agreed acceptance criteria and are formally accepted by the authorized role. Provides a clear audit trail for project closure.



CONFIRMS COMPLETION:
Shows agreed requirements have been met.



BUILDS CONFIDENCE:
Reduces disputes by using objective evidence.



ENABLES CLOSURE:
Triggers finalization of handover and benefits.



SUPPORTS ACCOUNTABILITY:
Provides traceability of decisions and approvals.



LINKS TO NEXT PHASE:
Confirms readiness for operations or ongoing support.

2 HOW TO APPLY

1



List each deliverable and its acceptance criteria.

2



Test or review the deliverable and collect evidence of results.

3



Record any exceptions and the agreed treatment for each one.

4



Obtain decision from the authorized accepting role (e.g. sponsor, customer or data owner).

5



File all evidence, including the approval, in the project records.



CONTROL:

Acceptance must cover all agreed criteria. Scope any exclusions clearly.

3 INPUTS & EVIDENCE



ACCEPTANCE CRITERIA:

Approved requirements, quality standards and measurable conditions for each deliverable.



DELIVERABLE OUTPUTS:

Final products, services or data to be accepted.



TEST OR REVIEW RESULTS:

Test reports, inspection records or peer review notes showing criteria have been met.



EXCEPTIONS LOG:

List of outstanding issues and agreed treatment with resolution or conditional acceptance.



AUTHORIZED ACCEPTING ROLE:

Named individual or group with formal authority, defined in the project agreement.



RECORDS & COMMUNICATION:

Signed acceptance statement, meeting notes and updated log of remaining obligations.

4 PRACTICAL EXAMPLE

Illustrative: a data migration deliverable has been accepted.



DELIVERABLE:

Customer records migrated to the new system.



EVIDENCE:

Record counts reconciled between old and new systems. Sample checks confirm data integrity.



EXCEPTIONS:

A small number of records could not be migrated and treatment was agreed and documented.



DECISION:

The designated data owner signed the acceptance statement after reviewing the evidence.

5 PITFALLS & LIMITS



GENERIC SIGNATURE:

A signature without scope or supporting evidence can conceal disagreement.



INCOMPLETE COVERAGE:

Missing deliverables or criteria may leave the project open to future claims.



WRONG AUTHORITY:

Approval must come from the role defined in the agreement. A signature from an uninvolved person is not valid.



UNCLEAR EXCEPTIONS:

Unresolved or undocumented exceptions create risk and can delay final closure.



LIMITATION:

Acceptance confirms delivery against agreed criteria only. It does not guarantee future performance or business benefits.

6 ACTIONS & OUTPUTS



COLLECT EVIDENCE:

Ensure all test results, review notes and exception records are complete and dated.



CONFIRM AUTHORITY:

Use the correct accepting role as defined in the project agreement.



OBTAIN ACCEPTANCE:

Secure a dated acceptance statement that references the deliverables and any conditions.



RETAIN RECORDS:

Store acceptance evidence in the project repository for audit and future reference.



IDENTIFY NEXT STEPS:

Document any conditional acceptance, remaining obligations and the handover to operations.



OUTPUTS:

Signed acceptance record, updated exception log and clear list of outstanding actions with owners and target dates.



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RESOLVE CONDITIONAL ACCEPTANCE



Make every condition attached to acceptance explicit and manageable.

1 PURPOSE & VALUE

Conditional acceptance means accepting deliverables with specific outstanding items that must be completed later.



MAKES CONDITIONS CLEAR:

States what is outstanding and why it is acceptable for now.



SUPPORTS CONTROL:

Allows planned closure while key items are tracked to completion.



REDUCES RISK:

Prevents forgotten actions and misaligned expectations.



BUILDS TRUST:

All parties agree on the conditions, owners and timing.

2 HOW TO APPLY

For each condition, record the key details and agree with the relevant authority.

1



Describe the condition clearly and link it to the deliverable.

2



State the required evidence of completion.

3



Assign an owner responsible for delivery.

4



Set an agreed deadline for completion.

5



Identify any required funding or resources.

6



Name the verification role who will confirm completion.

7



Agree the consequence if the condition is not satisfied.

3 INPUTS & EVIDENCE



DELIVERABLE & CONDITIONS:

Completed deliverable with the list of outstanding conditions.



REQUIRED EVIDENCE:

Type and format of evidence needed to confirm completion (e.g. updated files, test results, training records).



OWNERS:

Person responsible for each condition and the verification role who will confirm it.



APPROVAL & AGREEMENT:

Written agreement from the relevant authority that conditional acceptance is allowed.



FUNDING & RESOURCES:

Any budget or resources needed to complete the conditions.



CONSEQUENCE:

Agreed action if a condition is not satisfied by the deadline (e.g. rework, withheld payment, or escalation).

4 PRACTICAL EXAMPLE

Illustrative: a training package is conditionally accepted pending correction of two screenshots.



CONDITION: Update two screenshots that show incorrect menu names.



EVIDENCE: Revised screenshots in the final training slides.



OWNER: Training owner.



DEADLINE: By Friday.



FUNDING: Covered by existing budget.



VERIFICATION: Training owner will confirm the changes.



CONSEQUENCE:

If not completed, final acceptance will be withheld and the release may be delayed.

5 PITFALLS & LIMITS



NOT EXTRA TIME:

Conditional acceptance is not permission to ignore critical requirements.



USE ONLY WHEN ALLOWED:

Apply it only where the relevant authority and agreement permit.



UNCLEAR CONDITIONS:

Vague or incomplete conditions create confusion and disputes.



NO OWNER:

Conditions without a clear owner are unlikely to be completed.



MISSED DEADLINES:

Delays can affect project closure, payments and stakeholder trust.



NOT FOR CRITICAL ITEMS:

Do not use for safety, legal or regulatory requirements unless explicitly permitted.

6 ACTIONS & OUTPUTS



RECORD CONDITIONS:

Log all conditions with details from panel 2 in the project register or closure log.



TRACK TO CLOSURE:

Monitor progress, collect evidence and confirm completion with the verification role.



KEEP STAKEHOLDERS INFORMED:

Provide regular updates until all conditions are closed.



FORMALIZE OUTCOME:

Confirm final acceptance once all conditions are satisfied, or formally transfer remaining conditions with informed approval.



OUTPUTS:

Updated closure log, verified evidence, final acceptance record or formal transfer of conditions.





CONTROL THE FINAL PUNCH LIST



Maintain a concise, agreed record of remaining defects or incomplete work.

1 PURPOSE & VALUE

The final punch list records all remaining defects or incomplete work that must be resolved before formal project closure.



CLEAR RECORD:

Single, agreed list of outstanding items.



ACCOUNTABILITY:

Shows who will complete each item.



SMOOTHER HANDOVER:

Ensures nothing important is missed at transition.



REALISTIC CLOSURE:

Supports safe and authorized project closure.



TRANSPARENCY:

Builds trust with all stakeholders on the final status.

2 HOW TO APPLY



List each item with a clear description of the defect or incomplete work.



Assign a priority based on impact to safe use or business readiness.



State the impact if not resolved (e.g. safety, quality, operation or compliance).



Name the owner responsible for completing the work.



Set an agreed due date for completion.



Define the acceptance condition and the responsible receiving organization.



CONTROL:

Only include items compatible with readiness and authorized closure. Do not use as a list for major undelivered scope.

3 INPUTS & EVIDENCE



PROJECT DOCUMENTS:

As-built information, test records, commissioning reports and handover documents.



IDENTIFIED DEFECTS:

Issues from inspections, tests, walkdowns, user feedback and previous action logs.



RELEVANT EVIDENCE:

Photos, drawings, inspection reports and clear descriptions of each item.



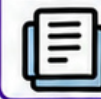
REQUIRED OWNERS:

Contractor or supplier, internal project team, and the receiving organization (e.g. operations or facility management).



AGREED CRITERIA:

Completion and acceptance conditions for each item, including who verifies the fix.



FUNDING CONFIRMATION:

Approved budget to complete the work, where required.

4 PRACTICAL EXAMPLE

Illustrative: three labeling defects are assigned to the supplier and one access issue to operations, each with an agreed verification method.



Item 1 - Label missing on valve

Owner: Supplier

Verify: Visual inspection.



Item 2 - Incorrect cable label

Owner: Supplier

Verify: Check against drawings.



Item 3 - Room name sign unclear

Owner: Supplier

Verify: Replace and photo record.



Item 4 - Access door sticks

Owner: Operations

Verify: Demonstrate smooth operation.

5 PITFALLS & LIMITS



NOT A HIDING PLACE:

Do not use the punch list for major undelivered scope or new project requests.



READINESS RISK:

Unresolved items must be compatible with operational readiness and authorized closure.



VAGUE DESCRIPTIONS:

Unclear items lead to disputes and may not be accepted.



MISSING OWNERSHIP:

Items without a confirmed owner or funding are unlikely to be completed.



DEPENDENCIES:

Some items rely on other work packages; agree and track dependencies.

6 ACTIONS & OUTPUTS



CONFIRM OWNERSHIP:

Agree responsible owner and required funding for each item.



MONITOR PROGRESS:

Track completion, support owners and remove blockers.



VERIFY COMPLETION:

Check that each item meets the agreed acceptance condition with the receiving organization.



UPDATE RECORDS:

Keep the punch list current and record evidence of completion and final disposition.



KEY OUTPUTS:

Closed punch list with evidence, updated handover records, and a final log showing the disposition of each item (completed, deferred with agreement, or transferred).



CONFIRM OPERATIONAL READINESS



Verify that the receiving organization can operate and support the delivered capability.



① PURPOSE & VALUE

Confirm that the receiving organization is ready to operate, support and sustain the delivered capability in business-as-usual.



ENSURE CONTINUITY:

Validates people, skills, tools and support are in place.



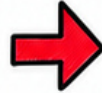
REDUCE RISK:

Prevents service disruption after handover.



CONFIRM ACCOUNTABILITY:

Identifies the operational owner and support routes.



ENABLE BENEFITS:

Allows the organization to realize the intended value from the delivered capability.

② HOW TO APPLY



Review operating procedures, runbooks and support processes.



Confirm trained people are available with the right access and responsibilities.



Verify monitoring, alerting and support routes are configured and tested.



Check capacity, environment availability and required resources.



Validate contingency arrangements, including backup and recovery.



CONTROL:

All essential operating tasks must be demonstrated and evidenced before transition.

③ INPUTS & EVIDENCE



OPERATING DOCUMENTATION:

Runbooks, standard operating procedures, support guides and handover notes.



TRAINING RECORDS:

Evidence of completed training and role responsibilities.



ACCESS & MONITORING:

User and system access, monitoring dashboards and alert configurations.



SUPPORT ARRANGEMENTS:

Service desk details, escalation routes and third-party contracts.



OWNERS & APPROVALS:

Named operational owner and written acceptance of responsibilities by the receiving organization.



EVIDENCE OF READINESS:

Records of completed operating tasks, tests and readiness reviews.

④ PRACTICAL EXAMPLE

Illustrative: The service team demonstrates incident triage and recovery using the delivered runbook before accepting responsibility.



PREPARE:

Provide the runbook, access and test environment to the operational team.



DEMONSTRATE:

The team performs incident triage and follows the runbook to recover the service.



CONFIRM:

Observers verify that steps are completed and captured as evidence.



OUTCOME:

Operational owner accepts responsibility once readiness is confirmed.

⑤ PITFALLS & LIMITS



TESTS ARE NOT ENOUGH:

Passing product or technical tests does not automatically establish operational readiness.



INCOMPLETE COVERAGE:

Missing procedures, monitoring or support routes can lead to service issues.



PEOPLE AND ACCESS:

Untrained staff or missing access rights can prevent effective operation.



CONTEXT DEPENDENT:

Readiness requirements vary by service, risk and regulatory context.



LIMITATION:

This card does not replace formal organizational approval processes.

⑥ ACTIONS & OUTPUTS



RECORD READINESS GAPS:

Log any outstanding actions to close before transition.



AGREE REMEDIATION:

Assign owners and deadlines for each gap.



CONFIRM OPERATIONAL OWNER:

Document the named owner and the scope of responsibilities.



OBTAIN AUTHORIZED DECISIONS:

Secure formal acceptance from the receiving organization.



COMPLETE TRANSITION:

Proceed once evidence is in place and all critical issues are resolved.



OUTPUTS:

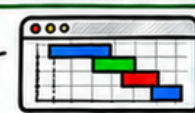
Readiness assessment record, action log, approval evidence and transition to business-as-usual.



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VALIDATE USER READINESS



Confirm that intended users can perform the key tasks the delivered change requires.



1 PURPOSE & VALUE

Validate user readiness checks that intended users can perform the important tasks the delivered change requires, using the approved scope and operating context.



CONFIDENCE:

Demonstrates users can work effectively with the new or changed solution.



SMOOTHER GO-LIVE:

Reduces disruption, rework and support demand.



ADOPTION:

Builds user confidence and helps embed the change in daily work.



BETTER OUTCOMES:

Ensures the expected benefits can be realised in practice.

2 HOW TO APPLY

1



Define representative user groups and the key tasks they must perform.

2



Confirm access needs, user roles and permissions are in place.

3



Provide guidance materials and identify support routes (eg. help desk, super users).

4



Run practical trials or demonstrations with representative users.

5



Collect evidence, address gaps and repeat testing until issues are resolved.



CONTROL:

Test in a realistic environment with representative users and data. Use non-sensitive data where possible.

3 INPUTS & EVIDENCE



RELEVANT INPUTS:

Defined user groups, representative tasks, access and role requirements, guidance materials and support plan.



PRACTICAL EVIDENCE:

Results from user trials or demonstrations, task completion records and observed issues.



EVIDENCE OF READINESS:

Users complete key tasks successfully with available guidance and support.



OWNERS:

Business owner for user readiness, IT for access and environment, and functional managers for users and guidance.



ADDITIONAL EVIDENCE:

Log of open issues and actions to closure, with named owners and due dates.

4 PRACTICAL EXAMPLE

Illustrative: representative users complete a purchase approval scenario during a trial and identify an unclear exception step before rollout.



1. SELECT USERS:

Choose a mix of typical users (eg. requesters and approvers).



2. RUN SCENARIO:

Users perform a purchase approval from start to finish using the new process.



3. FINDING:

Users identify an unclear exception step and ask for clearer guidance.



4. ACTION:

Guidance is updated and retested with users before go-live.

5 PITFALLS & LIMITS



NOT PROOF OF COMPETENCE:

Attendance at a briefing or training session is not evidence that users can actually perform their tasks.



INCOMPLETE COVERAGE:

Testing with a small or non-representative group may miss real-world issues.



DATA RISKS:

Protect sensitive or personal user data during readiness testing. Use non-sensitive or anonymised data where possible.



CONTEXT DEPENDENT:

Readiness depends on the final solution, organisation and user groups. Thresholds and acceptance criteria are project-specific.

6 ACTIONS & OUTPUTS



RESOLVE GAPS:

Fix material usability or knowledge gaps and update guidance, training or configuration.



ASSIGN OWNERSHIP:

Name the owner of ongoing adoption support (eg. business team or service desk).



CONFIRM READINESS:

Record evidence that users can perform key tasks and that support routes are in place.



UPDATE MATERIALS:

Finalise user guidance and FAQs based on trial feedback.



OUTPUTS:

User readiness confirmation, closed issue log, final guidance materials and named support owner for post-closure.



TRANSFER ACCOUNTABLE OWNERSHIP



Ensure that responsibility for assets, services, processes and remaining actions is accepted by the receiving roles.

1 PURPOSE & VALUE

Confirms that the right roles accept responsibility for assets, services, processes and any remaining actions when the project closes.



CONTINUITY:

Ensures ongoing delivery after project closure.



ACCOUNTABILITY:

Clear owner responsible for performance and actions.



RISK REDUCTION:

Prevents work being lost or left without an owner.



CLEAR TRANSITION:

Defines what is handed over and when it becomes effective.



SUPPORTS BENEFITS:

Enables sustained use and realization of project outcomes.

2 HOW TO APPLY

Document the transfer clearly and obtain acceptance from the receiving roles using these steps.

1



Identify what is transferring (assets, services, processes and remaining actions).

2



Confirm from whom to whom ownership is transferred.

3



Agree the effective date and any conditions for the transfer.

4



Define the required evidence and authority for acceptance.

5



Record the transfer and obtain explicit acknowledgment.



CONTROL:

Transfer is complete only when the receiving role accepts responsibility.

3 INPUTS & EVIDENCE



TRANSFER PLAN:

Lists what is being transferred, from whom, to whom, effective date and any conditions.



ASSET & SERVICE INFORMATION:

Documentation, user guides, configuration details and support arrangements.



REMAINING ACTIONS:

Open actions, responsibilities and target dates to be accepted by the new owner.



REQUIRED OWNERS:

Named receiving roles with the authority and capacity to take ownership.



EVIDENCE OF ACCEPTANCE:

Signed handover record, meeting minutes or formal approval confirming acceptance.



AUTHORITY & POLICIES:

Organisational policies or delegations that allow the transfer.

4 PRACTICAL EXAMPLE

Illustrative: the project manager transfers accountability for a new support service and related data responsibilities at project closure.



SERVICE TRANSFER:

Service accountability is transferred from the project manager to the operations owner, with support procedures and documentation.



DATA STEWARDSHIP:

Data stewardship is transferred from the project manager to the business data owner, including data definitions, access arrangements and data quality responsibilities.



CONFIRM ACCEPTANCE:

The receiving owners review the information and provide a signed acknowledgment of responsibility from the agreed effective date.

5 PITFALLS & LIMITS



EMAIL IS NOT ACCEPTANCE:

A document sent by email does not prove that the recipient has accepted or can fulfill the responsibility.



UNCLEAR SCOPE:

Incomplete or vague descriptions of what is being transferred lead to confusion and gaps.



INSUFFICIENT AUTHORITY:

The receiving role may not have the authority or resources to deliver.



MISSING INFORMATION:

Key documentation, access rights or knowledge may be absent, making effective ownership difficult.



ONGOING SUPPORT LIMITS:

Some transition support may be needed, but the project cannot remain responsible indefinitely.

6 ACTIONS & OUTPUTS



OBTAIN ACKNOWLEDGMENT:

Secure explicit acceptance from the receiving owner, recorded in writing.



RESOLVE GAPS:

Address any issues with authority, resources, skills or information before the effective date.



COMMUNICATE CHANGE:

Inform relevant stakeholders of the ownership transfer and the effective date.



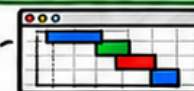
UPDATE RECORDS:

Update plans, logs and asset registers to reflect the new owner and close project responsibilities.



KEY OUTPUTS:

Signed handover record, updated ownership registers, closed actions and confirmation of the effective date communicated to stakeholders.





COMPLETE KNOWLEDGE TRANSFER



Enable receiving teams to apply essential knowledge rather than merely possess documents.

1 PURPOSE & VALUE

Transfer the knowledge, skills and context needed for receiving teams to operate, support and improve the solution after project closure.



SUSTAIN OPERATIONS:

Helps teams perform key tasks confidently and independently.



REDUCE RISK:

Prevents loss of critical know-how when the project team steps away.



BUILD CONFIDENCE:

Develops real capability through hands-on learning, not just documents.



LONG-TERM VALUE:

Enables continuous improvement and better decisions by the receiving team.

2 HOW TO APPLY

Combine structured explanation, practical practice and confirmation of understanding.



1

Identify critical tasks to be transferred and the target audiences.



2

Prepare concise guidance (runbooks, job aids) tailored to each audience.



3

Demonstrate key tasks and explain the reasoning and common variations.



4

Provide hands-on practice with realistic scenarios, followed by questions.



5

Confirm understanding by observing the team perform the tasks.



CONTROL:

Include both documented guidance and practical transfer activities.

3 INPUTS & EVIDENCE



PROJECT DOCUMENTATION:

Runbooks, user guides, configuration details and lessons learned.

Owner: Project Manager.



TRANSFER PLAN:

List of critical tasks, audiences and training approach.

Owner: Project Manager.



TRAINING MATERIALS:

Slides, job aids, demonstrations and practice scenarios.

Owner: Subject Matter Expert (SME).



EVIDENCE OF COMPLETION:

Attendance records, competency checks and sign-off records.

Owner: Project Manager.



OPEN QUESTIONS LOG:

Outstanding questions and issues to be resolved.

Owner: Project Manager.

4 PRACTICAL EXAMPLE

Illustrative: An operator uses the runbook to restart a failed job while the project specialist observes and corrects misunderstandings.



PREPARE:

Provide the runbook and a brief overview of the scenario and expected steps.



PRACTICE:

The operator performs the restart task in a test environment using the runbook.



OBSERVE:

The specialist watches, answers questions and corrects mistakes.



CONFIRM:

The operator repeats the task successfully without prompting.

5 PITFALLS & LIMITS



DOCUMENTS ALONE:

A recording or slide deck may not transfer tacit knowledge, judgement and workarounds.



WRONG DEPTH:

Too much or too little detail can leave gaps. Tailor the depth to the receiving team's actual needs and roles.



WRONG AUDIENCE:

Training the wrong people or not including all relevant roles risks knowledge gaps.



UNREALISTIC TIMING:

Rushed transfer may not allow enough practice and questions.



LIMIT:

Knowledge transfer reduces risk but cannot cover every future situation or replace ongoing support.

6 ACTIONS & OUTPUTS



CAPTURE QUESTIONS:

Record unresolved questions during training and address them or log them for follow-up.



CONFIRM CAPABILITY:

Verify that the receiving team can perform critical tasks independently and confidently.



IDENTIFY ONGOING SUPPORT:

Agree where further expertise can be obtained after closure (e.g. internal team, support desk or external supplier).



FINALIZE TRANSFER OUTPUTS:

Completed runbooks, training materials, competency records and the open questions log.



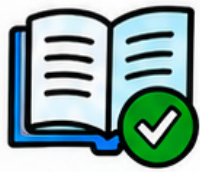
CLOSE OUT ACTIONS:

Ensure all planned knowledge transfer activities are completed and signed off.





DELIVER USABLE OPERATING GUIDES



Provide clear instructions that receiving teams can use for routine and exceptional work.

1 PURPOSE & VALUE

Operating guides give current instructions for routine and exceptional work so that receiving teams can run, support and troubleshoot the solution.



CONSISTENT OPERATION:

Ensures work is performed in a reliable and repeatable way.



KNOWLEDGE TRANSFER:

Captures essential know-how from the project team.



FASTER ISSUE RESOLUTION:

Helps users handle exceptions and recover safely.



SUSTAINED BENEFITS:

Supports continued value after project closure.

2 HOW TO APPLY

Prepare a practical guide that matches the released configuration and is easy for the target users to follow.

1



Define the purpose and scope of the guide.

2



List prerequisites (skills, access, tools and environment).

3



Provide step-by-step instructions for routine tasks and key exceptions.

4



Include checks, owner, version and support contact information.

5



Add escalation or recovery instructions for failures or unexpected results.



CONTROL:

Keep the guide accurate and in sync with the released version.

3 INPUTS & EVIDENCE



RELEASED CONFIGURATION:

Final version of the system, process or service that the guide covers.



BUSINESS PROCESSES:

Approved workflows, rules and exception handling.



INPUT MATERIALS:

Design summary, runbooks, test scripts and known issue records.



EVIDENCE OF QUALITY:

Completed operating guide, user review notes and approval record.



OWNERS:

Process owner, support owner and documentation owner provide content and sign-off.



DEPENDENCIES:

Access to the final environment and agreement on who maintains the guide after handover.

4 PRACTICAL EXAMPLE

Illustrative: A batch-processing guide explains how to verify input files, run the job, reconcile totals and route failed records.



VERIFY INPUT:

Check the file format, required fields and location before running the job.



RUN THE JOB:

Execute the approved script and monitor for successful completion.



RECONCILE TOTALS:

Compare the system totals with the input file totals.



ROUTE FAILURES:

Review error logs, move failed records to the error folder and follow the recovery steps.

5 PITFALLS & LIMITS



OUT-OF-DATE CONTENT:

Guides that do not reflect the released configuration can mislead users.



TOO MUCH DETAIL:

Long technical explanations can obscure the essential user actions.



MISSING EXCEPTIONS:

Failing to cover common errors or recovery steps leads to delays.



UNCLEAR OWNERSHIP:

Without a named owner, guides are not maintained and quickly become obsolete.



LIMITATION:

Guides cannot cover every unusual situation; complex issues may still require specialist support.

6 ACTIONS & OUTPUTS



TEST WITH USERS:

Have intended users follow the guide and confirm it is clear and complete.



CORRECT GAPS:

Update based on user feedback and remove unnecessary detail.



ASSIGN OWNERSHIP:

Transfer maintenance responsibility to a named process or support owner.



FINAL OUTPUT:

Approved operating guide, stored in the agreed repository and made available to users.



KEEP CURRENT:

Update the guide when changes are released and after significant incidents.



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30 Project Closure Best Practices



RECONCILE ASSETS AND LICENSES



Confirm the identity, location, ownership and ongoing obligations for delivered assets.

1 PURPOSE & VALUE

Confirm the identity, location, ownership and ongoing obligations associated with delivered assets.



CONFIRM ASSETS:

Ensure the right items were delivered and are accounted for.



VERIFY DETAILS:

Check identity, location, ownership and responsible team for each asset.



MANAGE OBLIGATIONS:

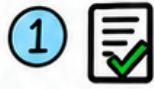
Identify licenses, support entitlements and maintenance duties that continue after closure.



ADD VALUE:

Prevents lost assets, avoids non-compliance, and enables smooth handover to operations.

2 HOW TO APPLY



Create a complete list of delivered assets, software and licenses.



Reconcile with configuration records and asset registers.



Verify license entitlements, support agreements and renewal obligations.



Confirm ownership, location and the receiving team responsible for each item.



Collect and archive transfer evidence and update records.



CONTROL:

All assets and licenses must be reconciled before project closure. Use N/A where not applicable.

3 INPUTS & EVIDENCE



ASSET INVENTORY:

List of delivered hardware, software and other assets with key details.



CONFIGURATION RECORDS:

Approved records showing asset identifiers and settings.



LICENSE AND SUPPORT DATA:

License entitlements, installation records, support agreements and renewal dates.



TRANSFER EVIDENCE:

Handover documents, emails, sign-offs and updated registers.



KEY OWNERS:

Project team, asset custodian, IT operations, software license manager and procurement.



SCOPE REFERENCE:

Approved scope, contracts and supplier documentation.

4 PRACTICAL EXAMPLE

Illustrative: A team transfers ten devices, their serial numbers, support details and software entitlement records to the asset custodian.



ASSETS:

Ten laptops with serial numbers and asset tags.



LICENSES:

Operating system and productivity software entitlements for each device.



SUPPORT:

Support agreement details and renewal dates.



TRANSFER:

Handover document signed by the project team and asset custodian and records updated in the asset register.

5 PITFALLS & LIMITS



POSSESSION ≠ RIGHT TO USE:

Having an installer or software media does not establish a right to use the software.



CONTRACT TERMS:

License and support terms must be reviewed by the appropriate specialists (e.g., legal or procurement).



INCOMPLETE INFORMATION:

Missing serial numbers, entitlements or locations create gaps and risk.



DEPENDENCIES:

Some assets may rely on other systems or services. Confirm all dependencies before handover.



SCOPE LIMIT:

Requirements and thresholds are project-specific. Use N/A where not applicable.

6 ACTIONS & OUTPUTS



RESOLVE DISCREPANCIES:

Investigate and fix missing or conflicting asset, license or support information.



CONFIRM OBLIGATIONS:

Record renewal dates, support entitlements and maintenance responsibilities with the owner.



PROVIDE TO OWNER:

Supply a clean, usable inventory and license register to the receiving owner or operations team.



UPDATE RECORDS:

Update asset management and configuration systems with final details and ownership.



OUTPUTS:

Reconciled asset and license inventory, transfer evidence, renewal obligations and updated records ready for ongoing use.



REVIEW ACCESS AND CREDENTIALS



Adjust project access to match the roles and responsibilities that remain after transition.

1 PURPOSE & VALUE

Ensure only the right people and systems keep access after project closure, supporting security, continuity and accountability.



RIGHT ACCESS:

Match access to ongoing roles and responsibilities.



LOWER RISK:

Reduce risk of unauthorized use after the project ends.



SMOOTH TRANSITION:

Keep necessary access for operations and support.



CLEAR OWNERSHIP:

Confirm who owns each account or permission.

2 HOW TO APPLY

Identify, review and update access using your organization's approved security processes.



Identify all project-related accounts, permissions and data-sharing settings.



Check who still needs access based on future roles and responsibilities.



Transfer ownership of ongoing accounts to the operational team.



Revoke or disable access that is no longer required using approved processes.



Record the changes and confirm completion with the relevant owners.

3 INPUTS & EVIDENCE



ACCESS INVENTORY:

List of user accounts, service credentials and data-sharing permissions for the project.



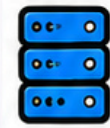
REQUIRED OWNERS:

Project manager, system owners, security/IT and data owners.



APPROVAL RECORDS:

Requests and approvals for access changes using authorized security processes.



CHANGE EVIDENCE:

Logs or records showing accounts transferred, disabled or retained.



OPERATIONAL CONFIRMATION:

Written confirmation from responsible owners that access is correct.

4 PRACTICAL EXAMPLE

Illustrative: A project used temporary supplier accounts for development and testing. After support handover, these temporary accounts are disabled, while approved operational service accounts remain active under named ownership.



TEMPORARY ACCOUNTS:

Supplier and contractor accounts are disabled after their support period ends.



ONGOING ACCOUNTS:

Operational service accounts remain active under a named owner in the operations team.



CONFIRMATION:

Access changes are recorded and confirmed by the relevant system owner.

5 PITFALLS & LIMITS



DO NOT SHARE SECRETS:

Do not distribute passwords or secret credentials in ordinary closure documents.



HIDDEN DEPENDENCIES:

Removing access without checking operational dependencies can cause disruption to live services.



INCOMPLETE INVENTORY:

Missing accounts, service credentials or data-sharing permissions may remain active unintentionally.



PROCESS COMPLIANCE:

Always use authorized security processes. Do not make ad hoc changes outside approved procedures.

6 ACTIONS & OUTPUTS



CONFIRM ACCESS CHANGES:

Review and agree changes with responsible owners (system, security and data owners).



TRANSFER OWNERSHIP:

Assign ongoing accounts to the operational team and update ownership records.



REVOKE UNNEEDED ACCESS:

Disable temporary accounts and remove permissions no longer required.



RETAIN EVIDENCE:

Keep records of access changes and approvals. Do not include passwords or secret values.



FINAL OUTPUT:

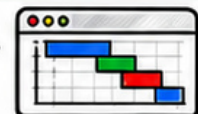
Updated access inventory with correct owners and evidence that changes were completed.



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30 Project Closure Best Practices





RECONCILE CONTRACTS AND ORDERS



Establish a clear status for procurement commitments and remaining commercial obligations.

1 PURPOSE & VALUE

Reconcile contracts, purchase orders and related commitments to confirm what has been delivered, accepted, paid and what remains.



CLEAR STATUS:

Identifies completed, open and terminated commitments.



MANAGE OBLIGATIONS:

Ensures remaining commercial duties are understood and assigned.



SUPPORT CLOSURE:

Provides confidence that procurement activities are properly closed or transitioned.



ENABLE HANDOVER:

Passes ongoing obligations to the correct owner for post-project management.

2 HOW TO APPLY

1



Review delivery, acceptance and invoice records for each contract and purchase order.

2



Check for open orders, outstanding invoices, claims and warranty obligations.

3



Discuss findings with commercial, procurement and technical owners.

4



Confirm closure requirements specific to each contract type and supplier.

5



Agree the final status and record any ongoing obligations with the responsible owner.



CONTROL:

Do not close a contract until all required reviews are complete.

3 INPUTS & EVIDENCE



CONTRACT DOCUMENTS:

Contracts, purchase orders, change orders and terms and conditions.



DELIVERY & ACCEPTANCE RECORDS:

Delivery notes, inspection reports and acceptance certificates.



INVOICES & PAYMENTS:

Supplier invoices, payment records and reconciliation statements.



CLAIMS AND VARIATIONS:

Open or settled claims and contract variations.



WARRANTIES AND SUPPORT:

Warranty terms, service agreements and post-project support obligations.



REQUIRED OWNERS:

Procurement/commercial team, technical owner, finance, and the future owner for ongoing obligations (e.g., operations or maintenance).

4 PRACTICAL EXAMPLE

Illustrative example at project close:

A piece of equipment has been delivered, installed and accepted. All invoices are paid and the purchase order is closed.

However, a related service order remains open for a scheduled follow-up inspection under the warranty. This commitment is not closed by the project.



ACTION:

Transfer the open service order to operations, record the new owner and confirm the required inspection date.



RESULT:

Equipment procurement is closed, with the remaining service obligation properly assigned for post-project management.

5 PITFALLS & LIMITS



ADMINISTRATIVE CLOSURE:

Project closure does not automatically terminate contracts or waive rights.



INCOMPLETE INFORMATION:

Missing delivery, acceptance or invoice records can lead to incorrect closure status.



UNRESOLVED CLAIMS:

Outstanding claims and variations must be addressed or explicitly carried forward.



IGNORING WARRANTIES:

Warranty and support obligations often continue after project closure.



AUTHORIZATION REQUIRED:

Only authorized commercial review can confirm final status and any contract termination.

6 ACTIONS & OUTPUTS



RECORD DISPOSITION:

Document the status of each contract and purchase order (completed, closed, ongoing or terminated).



IDENTIFY OWNERS:

Assign a clear owner for all obligations that continue after project closure.



UPDATE LOGS:

Maintain a contract and commitment register with final status and owners.



FORMAL HANDOVER:

Provide relevant records and obligations to the future owner (e.g., operations or maintenance).



CLOSURE OUTPUTS:

Reconciled contract status report, updated commitment register and evidence of agreed ownership for ongoing obligations.



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30 Project Closure Best Practices





CONFIRM FINAL INVOICE STATUS



Make unpaid, disputed and expected invoices visible to the responsible finance and commercial teams.

1 PURPOSE & VALUE

Confirms the status of final invoices by matching them to accepted work, purchase orders and approvals. Makes unpaid, disputed and expected invoices visible to the finance and commercial teams.



CLARITY:

Shows what is approved, unpaid, disputed or expected.



ALIGNMENT:

Supports agreement between project, commercial and finance.



CLOSURE:

Helps resolve open items and complete financial close.



CASH FLOW:

Identifies upcoming payments and potential liabilities.



ACCOUNTABILITY:

Assigns owners for unresolved items and decision dates.

2 HOW TO APPLY



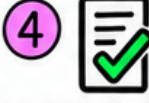
List all invoices from suppliers and subcontractors, including unpaid, disputed and expected.



Match each invoice to accepted work, the purchase order, approvals and receiving records.



Confirm the correct amount, currency, taxes and any agreed variations or credits.



Check for received but uninvoiced work and expected final invoices.



Record the current status, owner and expected decision date for each item.



CONTROL:

Do not double-count invoices already represented in accruals.

3 INPUTS & EVIDENCE



SUPPLIER INVOICES:

Final and interim invoices, including credit notes and adjustments.



PURCHASE ORDERS:

POs, contract terms and agreed rates.



APPROVAL RECORDS:

Proof of approved work, variations and authorizations.



RECEIVING RECORDS:

Evidence of delivered work, goods or services.



OWNERS & TEAMS:

Accounts payable, project manager and commercial lead as responsible owners.



OTHER EVIDENCE:

Correspondence, claims records and settlement agreements related to disputed amounts.

4 PRACTICAL EXAMPLE

Illustrative: A supplier's final invoice is partly disputed. The approved amount and disputed balance are recorded separately with accountable owners.



INVOICE STATUS:

Approved amount:
Linked to accepted work.
Disputed balance:
Under review with supplier.



OWNERS:

Approved amount: Accounts payable (payment).
Disputed balance: Project manager and commercial lead (resolution).



NEXT STEP:

Agree actions and expected decision date for the disputed amount with the supplier.

5 PITFALLS & LIMITS



"FINAL" LABEL:

A final invoice does not prove the work is complete, accurate or contractually correct.



DOUBLE-COUNTING:

Avoid including invoices already represented in project accruals or provisions.



MISSING EVIDENCE:

Lack of approvals or receiving records can delay payment and closure.



DISPUTES:

Disputed amounts may remain unresolved and extend beyond project close.



LIMIT:

Invoice status depends on available records and cooperation from suppliers. Thresholds and actions are project-specific.

6 ACTIONS & OUTPUTS



RECONCILE STATUS:

At an agreed cutoff date, confirm invoice status and match to accepted work, POs and approvals.



TRANSFER OPEN ITEMS:

Carry forward unresolved invoices with evidence and expected decision dates to the finance team.



ASSIGN OWNERS:

Confirm responsible owners for payment, dispute resolution or follow-up with suppliers.



OUTPUTS:

Reconciled invoice status list showing paid, unpaid, disputed and expected invoices with owners and next actions.



SUPPORT CLOSURE:

Helps complete final payments, resolve disputes and transfer remaining items for ongoing management.



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30 Project Closure Best Practices



RECONCILE FINAL PROJECT COSTS



Produce a defensible picture of project cost at closure, including known remaining obligations.



1 PURPOSE & VALUE

Brings together all project cost information to show the final position at closure, including known remaining obligations.



CLEAR POSITION:

Shows total incurred cost and what is still outstanding.



DEFENSIBLE RECORD:

Supports audit, governance and lessons learned.



INFORMED DECISIONS:

Shows what work and payments remain to close.



STAKEHOLDER CONFIDENCE:

Provides a transparent and agreed final cost view.

2 HOW TO APPLY

Align the ledger, accruals, commitments and authorized adjustments under agreed definitions and reporting dates.



1 Confirm reporting date and definitions for incurred cost, accruals and commitments.



2 Reconcile ledger, accruals and commitments.



3 Investigate and explain material differences.



4 Include authorized adjustments (e.g. approved change orders).



5 Agree the final position with finance and document the results.

3 INPUTS & EVIDENCE



FINANCIAL RECORDS:

General ledger, cost reports, accrual schedules and commitment records.



CONTRACTS & AGREEMENTS:

Supplier contracts, purchase orders and terms and conditions.



CHANGE RECORDS:

Approved change orders and budget adjustments.



SUPPLIER INFORMATION:

Invoices received, credit notes and proof of received work not yet invoiced.



OWNERS & STAKEHOLDERS:

Project manager, finance team, procurement and project sponsor to provide data and review.

4 PRACTICAL EXAMPLE

Illustrative: reconcile costs at closure before other adjustments.

Paid costs: \$90,000
Received uninvoiced work: \$8,000

Incurred cost (before other adjustments): **\$98,000**



INTERPRETATION:

Total incurred cost includes work paid for and work received but not yet invoiced. Other authorized adjustments may also apply.



NOTE:

This example is illustrative only. Actual amounts and adjustments will vary by project.

5 PITFALLS & LIMITS



DIFFERENT MEASURES:

Incurred cost, cash paid and future commitments are different. Do not add overlapping values.



DOUBLE COUNTING:

The same work may appear in the ledger, accruals and invoices. Check for overlaps.



TIMING DIFFERENCES:

Costs may fall in different accounting periods. Use the agreed reporting date.



INCOMPLETE INFORMATION:

Missing invoices or unapproved changes can understate final cost.



JUDGEMENT REQUIRED:

Some adjustments need judgement. Document assumptions and rationale.

6 ACTIONS & OUTPUTS



OBTAIN FINANCE REVIEW:

Agree the reconciled cost and explanations with the finance team.



DOCUMENT ASSUMPTIONS:

Record definitions, data sources, reporting date and reasons for any adjustments.



IDENTIFY RESPONSIBILITIES:

Confirm who will process post-closure adjustments and outstanding invoices.



KEY OUTPUTS:

Final cost reconciliation, summary of remaining obligations and a record of approved adjustments.



USE THE RESULTS:

Provide the final cost information for sponsor sign-off, project closure reporting and lessons learned.



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30 Project Closure Best Practices



EXPLAIN FINAL PERFORMANCE



Provide a balanced account of delivery against approved scope, schedule, cost and quality.



1 PURPOSE & VALUE

Explain how the project performed against the approved scope, schedule, cost and quality expectations, using evidence and a balanced view.



ACCOUNTABILITY:

Shows what was delivered and how well.



TRANSPARENCY:

Openly reports successes and shortfalls.



LEARNING:

Provides insights for future decisions and similar projects.



STAKEHOLDER CONFIDENCE:

Builds trust through a fair and evidence-based summary.

2 HOW TO APPLY

Use the approved baselines, actual outcomes, and approved changes to assess performance and explain material exceptions.

1



Confirm the correct approved baseline for scope, schedule, cost and quality.

2



Collect actual outcomes and approved changes.

3



Compare actual vs baseline, including forecast at completion (where relevant).

4



Explain material exceptions with evidence and agreed rationale.



CONTROL:

Use only approved baselines and formally approved changes.

3 INPUTS & EVIDENCE



BASELINE DOCUMENTS:

Approved scope, schedule, cost and quality baselines.



ACTUALS & FORECASTS:

Final actual outcomes and latest forecast at completion (where relevant).



APPROVED CHANGES:

Change log with effective dates, scope and rationale.



PERFORMANCE EVIDENCE:

Test results, acceptance records, deliverable sign-offs, quality reviews and closeout reports.



OWNERS:

Project manager prepares, finance verifies costs, quality lead confirms quality, and sponsor/PMO validates the overall narrative.

4 PRACTICAL EXAMPLE

Illustrative: A project finishes two weeks after the original baseline but within a formally approved revised date. Both facts are reported transparently.



Original baseline finish:
30 Sep 2024



Approved revised finish
(after change): 14 Oct 2024



Actual finish:
14 Oct 2024



EXPLANATION:

The project is two weeks later than the original baseline, but on the approved revised date due to a documented scope change.

5 PITFALLS & LIMITS



SINGLE METRIC BIAS:

A favorable result in one area (e.g., cost) should not hide missed outcomes in other areas (e.g., scope or quality).



UNSUPPORTED CAUSES:

Do not attribute causation without clear and verifiable evidence.



INCOMPLETE BASELINE:

Using the wrong or incomplete baseline leads to misleading conclusions.



IGNORING CHANGES:

Failing to include approved changes can make performance look better or worse than it is.



CONTEXT LIMITS:

Performance is project-specific; thresholds and materiality are defined in the project.

6 ACTIONS & OUTPUTS



PUBLISH NARRATIVE:

Create a concise performance summary covering scope, schedule, cost and quality with balanced findings.



EXPLAIN EXCEPTIONS:

Describe material variances, causes and approved changes with evidence.



SHARE LESSONS:

Record key lessons and what worked well for future projects.



NOTE REMAINING RISKS:

Identify any outstanding issues or uncertainties after closure.



OUTPUTS:

Final performance report, lessons log and a clear record of evidence to support future decisions.



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30 PROJECT CLOSURE BEST PRACTICES





TRANSFER RESIDUAL RISKS



Ensure that uncertainties persisting after project closure have informed, capable receiving owners.

1 PURPOSE & VALUE

Transfer residual risks so that uncertainties that remain after project closure are owned, understood and actively managed by the organization.



CONTINUITY:

Keeps risk management in place beyond the project.



ACCOUNTABILITY:

Gives a clear, named owner with the necessary authority.



RESILIENCE:

Helps the organization respond to future events.



INFORMED CLOSURE:

Ensures outstanding exposure is considered and documented before the project ends.

2 HOW TO APPLY



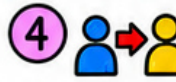
Review each residual risk description and current exposure.



Confirm existing controls, triggers and response actions.



Agree escalation routes and roles with the receiving organization.



Transfer the risk record, including the management plan, to the new owner.



Obtain confirmation that the owner accepts the risk and can manage it.



CONTROL:

Transfer must be explicit and approved; do not assume handover.

3 INPUTS & EVIDENCE



RISK REGISTER:

Residual risk descriptions, current exposure, controls, triggers and response actions.



HANDOVER DOCUMENT:

Updated risk record and management plan for the receiving organization.



KEY OWNERS:

Receiving risk owner, risk management team and relevant operational or service owner.



EVIDENCE OF ACCEPTANCE:

Written acknowledgment that the owner understands and accepts the risk and actions.



SUPPORTING INFORMATION:

Lessons learned, relevant contracts or supplier details, and any ongoing monitoring requirements.

4 PRACTICAL EXAMPLE

Illustrative: A low-volume supplier dependency remains after delivery. The project transfers this risk to the service owner with a monitoring and contingency plan.



RISK:

Specialist component supplied by a single low-volume vendor.



REMAINING EXPOSURE:

Potential supply disruption after project closure.



TRANSFER ACTION:

Service owner accepts the risk, agrees to monitor supplier health and maintain a contingency plan.



OUTCOME:

Risk record updated, owner acknowledges and continues management through BAU.

5 PITFALLS & LIMITS



FALSE CLOSURE:

Closing a risk record does not remove the underlying uncertainty.



UNCLEAR OWNERSHIP:

If the transfer is not explicit, risks may be unmanaged.



INSUFFICIENT CAPABILITY:

The receiving owner may lack authority, resources or expertise to manage the risk.



MISSING INFORMATION:

Incomplete details on controls, triggers or escalation routes can lead to poor management.



INCOMPATIBLE PROCESSES:

The transferred risk may not fit the owner's risk process or taxonomy.

6 ACTIONS & OUTPUTS



UPDATE RISK RECORD:

Document the new owner, responsibilities, controls, triggers and review arrangements.



CONFIRM ACCEPTANCE:

Obtain written acknowledgment from the receiving owner.



INTEGRATE INTO PROCESS:

Add the risk to the owner's risk register and ongoing monitoring process.



ENSURE CONTINUED REVIEWS:

Agree review frequency and escalation routes for future events.



OUTPUTS:

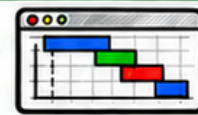
Transferred risk record, owner acknowledgment, and evidence that monitoring and controls will continue after closure.



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30 Project Closure Best Practices





TRANSFER OPEN ISSUES



Move unresolved problems to an appropriate receiving process with clear accountability.

1 PURPOSE & VALUE

Place unresolved actual problems into an appropriate receiving process with clear accountability, so the project can close without abandoning important work.



CONTINUITY: Ensures the issue continues to be managed after closure.



ACCOUNTABILITY: Assigns a named owner in the receiving team or process.



FINISH CLEANLY: Allows project closure while keeping visibility on remaining work.



PROTECT VALUE: Reduces the risk of lost issues and future service disruption.

2 HOW TO APPLY

Document each open issue with the information below and transfer it to the agreed receiving process.

1



Describe the issue and its business impact.

2



Record current status and actions already taken.

3



Identify the owner in the receiving process.

4



Set a target due date and confirm funding arrangements.

5



Agree a priority level using the receiving process criteria.

6



Define verification of completion or the escalation route if it is not resolved.

3 INPUTS & EVIDENCE



ISSUE RECORD:

Clear description, impact, status and actions taken.



RECEIVING PROCESS:

Agreed destination such as operations, service desk or product backlog.



REQUIRED OWNERS:

Named owner and team who will take responsibility.



PLANS & FUNDING:

Target due date, funding source and resource agreement.



PRIORITY & ESCALATION:

Priority level and escalation path if not resolved.



ACCEPTANCE EVIDENCE:

Confirmation that the receiving team has accepted the issue and created a record.

4 PRACTICAL EXAMPLE

Illustrative: a minor reporting defect is transferred to the support backlog.



ISSUE:

Monthly report shows a formatting error that does not affect data accuracy.



ACTIONS TAKEN:

Workaround agreed with users and included in the guide.



TRANSFER:

Logged in the support backlog with a named support owner and target fix date.



OUTCOME:

Project closes, and the support team tracks the fix to completion.

5 PITFALLS & LIMITS



DO NOT RE-LABEL:

Do not treat an open issue as a risk just to make the project look complete.



MATERIAL ISSUES:

Significant unresolved problems may prevent project closure.



LOSS OF TRACKING:

Transferring without a confirmed record can lead to issues being forgotten.



UNCLEAR OWNERSHIP:

If no owner or due date is set, the issue may never be resolved.



DIFFERENT PROCESS:

The receiving process may use different priorities and timescales than the project.

6 ACTIONS & OUTPUTS



PREPARE RECORD:

Complete the issue information and confirm it is ready for transfer.



OBTAIN ACCEPTANCE:

Get informed acceptance from the receiving team or process.



VERIFY CREATION:

Check that a record exists in the receiving system and can be tracked.



CONFIRM TRACKING:

Ensure the issue is visible with the agreed owner, due date and priority.



FINAL OUTPUT:

Transferred issue record with clear accountability, ready for monitoring after project closure.



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30 Project Closure Best Practices





Make the post-delivery support arrangement understandable and operational.

1 PURPOSE & VALUE

Defines the post-delivery support arrangement so users know how to get help and what is covered, while operations can manage expectations and continuity.



SUPPORT COVERAGE:
Clarifies what is included after project handover.



CLEAR TIMING:
Specifies the start and end dates of warranty and support.



ACCESS TO HELP:
Provides defined contacts and request channels.



SMOOTH TRANSITION:
Ensures ongoing support is operational and known to all stakeholders.

2 HOW TO APPLY

Set up and communicate the support arrangement with clear terms and operational steps.



1 Define coverage, start and end dates, and what is included and excluded.



2 Confirm support contacts and the request channel (e.g. helpdesk or email).



3 Agree response commitments where applicable and how escalation works.



4 Document the process and evidence needed to request support.



5 Communicate the arrangement to users and internal teams before project support ends.



CONTROL:
The applicable agreement controls all support obligations.

3 INPUTS & EVIDENCE



CONTRACT / AGREEMENT:
Warranty and support terms, coverage, exclusions, start and end dates, and escalation rights.



SUPPORT PROCESS:
Request channel, contacts, escalation path and any response commitments.



EVIDENCE TO REQUEST SUPPORT:
Required information such as description of the issue, steps to reproduce and logs or screenshots.



OWNERS:
Project manager (setup and handover), operations/service owner (run ongoing support), and supplier (contact and escalation).



CHANGE RECORDS:
Handover documents and any open or known issues at the end of the project.

4 PRACTICAL EXAMPLE

Illustrative: A new system is deployed and handed over to operations.



USER SUPPORT ROUTE:
End users are told to raise requests through the organisation's helpdesk.



WARRANTY TERMS:
Operations retains the supplier's warranty terms, including coverage, start and end dates, and exclusions.



ESCALATION CONTACTS:
Escalation contacts from the supplier are recorded and kept by operations.



COMMUNICATION:
A clear handover notice explains how to get support and what changes when project support ends.

5 PITFALLS & LIMITS



UNCLEAR COVERAGE:
Assuming all issues are covered. Only what is in the agreement is included.



WRONG CONTACT:
Users contacting the project team after handover, causing delays.



IGNORED TIMING:
Not checking the start and end dates, leading to unmet expectations.



UNREALISTIC COMMITMENTS:
Do not invent service levels or assume fixed response times that are not in the agreement.



LIMITATION:
Warranty and support do not cover every defect or change. The applicable agreement controls obligations.

6 ACTIONS & OUTPUTS



TEST SUPPORT ROUTING:
Raise a sample request through the agreed channel and confirm it reaches the right team.



ASSIGN OWNERSHIP:
Confirm internal support owner and supplier contacts for ongoing support.



COMMUNICATE CHANGES:
Inform users what support is available and what changes when project support ends.



OUTPUTS:
Documented support arrangement, contact list, user communication and recorded handover to operations.



MONITOR & REVIEW:
Check that support is working after handover and update information if contacts or terms change.





PLAN EARLY-LIFE SUPPORT EXIT



Define when additional transition support can end and normal operations can take full responsibility.

1 PURPOSE & VALUE

Set clear and agreed conditions for ending additional transition support after go-live, so normal operations can take full responsibility with confidence.



CLARITY:

Defines when support can end.



SMOOTH HANDOVER:

Ensures operations are ready and supported.



RIGHT RESOURCES:

Avoids unnecessary project support costs.



SUSTAINABLE OPERATIONS:

Confirms stable performance and trained teams.

2 HOW TO APPLY

Agree the duration or exit criteria and confirm readiness.



1 Define the support scope, duration or exit criteria and success measures.



2 Identify outstanding work and confirm owners in normal support.



3 Complete knowledge transfer and confirm operational readiness.



4 Review evidence against the agreed criteria.



5 Obtain the authorized decision to close additional support.



CONTROL:

Exit only when all agreed criteria are met and accepted by the authority.

3 INPUTS & EVIDENCE



AGREED EXIT PLAN:

Defined scope, duration or exit criteria and success measures for early-life support.



OPERATIONAL EVIDENCE:

Evidence of stable operation, including service performance, resolved issues and user acceptance.



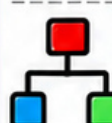
OUTSTANDING WORK:

List of open items with accepted owners in the normal support process and target resolution.



KNOWLEDGE TRANSFER RECORDS:

Training completion, handover documents and procedures available to operations.



AUTHORITY & OWNERS:

Named person or group authorized to approve exit, and operational owners for ongoing support.

4 PRACTICAL EXAMPLE

Illustrative example of an early-life support exit decision:



Operating evidence shows the new system is running normally and meeting agreed measures.



All unresolved items have accepted owners in the normal support process.



Operations confirm they are ready to take full responsibility.



The authorized owner reviews the evidence and approves the end of enhanced support.

RESULT:

Additional transition support ends and normal operations take ownership, with open items managed as agreed.

5 PITFALLS & LIMITS



FIXED TIME ONLY:

A set number of quiet days may not be enough evidence, especially for infrequent processes.



WRONG MEASURES:

Criteria that do not match the operational context can give a false sense of readiness.



INCOMPLETE TRANSFER:

Missing knowledge or documentation can leave operations unprepared.



UNCLEAR OWNERSHIP:

Open items without confirmed owners create risk after exit.



LOSS OF VISIBILITY:

Stopping support too early can hide emerging issues.



CAUTION:

Criteria and evidence must be tailored to the operational context. There is no universal threshold.

6 ACTIONS & OUTPUTS



REVIEW EVIDENCE:

Check performance, user feedback and issue resolution against the agreed exit criteria.



CONFIRM READINESS:

Ensure all outstanding work has accepted owners and operations are prepared to take over.



OBTAIN DECISION:

Present the evidence and obtain the authorized approval to end additional support.



COMMUNICATE CHANGES:

Inform all stakeholders of the new support arrangements, contacts and escalation routes.



KEY OUTPUTS:

Approved exit decision, closed support plan, transition records and communication to operational teams.





Ensure that later adoption and benefit measurement remain owned after project delivery ends.

1 PURPOSE & VALUE

Transfer accountability for realizing and measuring benefits to the business after project delivery ends.



CONTINUES VALUE:

Ensures planned benefits are actively owned and pursued after handover.



CLEAR OWNERSHIP:

Assigns responsibility for adoption, measurement and corrective actions.



SUSTAINS CHANGE:

Links project outcomes to long-term business results.



INTEGRATES WITH BAU:

Embeds benefits tracking in normal management processes.

2 HOW TO APPLY

Confirm the key elements that the business owner will manage after project closure.

1



Agree the business owner who will be accountable for the benefits.

2



Confirm the baseline position before the change.

3



Define the benefits, measures and key assumptions.

4



Set review dates after delivery and what actions are still needed.

5



Document how results will be tracked and how issues will be escalated.



CONTROL:

Do not close the project until benefits accountability is agreed and documented.

3 INPUTS & EVIDENCE



BUSINESS CASE:

Planned benefits, measures, assumptions and target outcomes.



BENEFITS PLAN:

Definitions, baselines, data sources, review dates and required actions.



DATA & REPORTS:

Baseline data and sources to measure the benefits.



REQUIRED OWNERS:

Business owner, operational manager and finance or performance team.



RELATED DOCUMENTS:

Project closure report, transition or handover plan, and any ongoing change activities.



EVIDENCE OF AGREEMENT:

Signed or recorded approval of benefits accountability and review arrangements.

4 PRACTICAL EXAMPLE

Illustrative: A new workflow is introduced to reduce processing time. The operations manager will own measuring the benefit for three months after go-live.



BENEFIT:

Shorter processing time for customer requests.



MEASURE:

Average processing time.



OWNER:

Operations manager (after project closure).



REVIEW:

Monthly for three months to confirm adoption and improvements.



ACTIONS:

If expected improvement is not achieved, investigate causes and apply corrective actions.

5 PITFALLS & LIMITS



DELIVERY ≠ BENEFITS:

Acceptance of project deliverables is not proof that benefits have occurred.



TIME LAG:

Some benefits emerge later and may take time to materialize.



DEPENDENCIES:

Outcomes may depend on other changes or external factors outside the project.



MEASUREMENT RISK:

Lack of clear measures or baseline data can make it hard to confirm results.



OWNERSHIP GAP:

If a business owner is not agreed, benefits may not be tracked or actions taken.

6 ACTIONS & OUTPUTS



HAND OVER PLAN:

Transfer the benefits plan, measures and data sources to the business owner.



AGREE REVIEW PROCESS:

Confirm when results will be reviewed and who will attend.



MONITOR & CHALLENGE:

Review results against the baseline and planned benefits. Discuss variances and causes.



CORRECTIVE ACTIONS:

Agree and track actions if benefits are not being realized as expected.



KEY OUTPUTS:

Documented benefits handover, agreed review dates, and a record of first review after project closure.



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30 Project Closure Best Practices





SCHEDULE POST-PROJECT REVIEWS



Set useful follow-up reviews to assess sustained operation, adoption, benefits and obligations.

① PURPOSE & VALUE

Post-project reviews assess whether the solution is operating as intended, being adopted, delivering expected benefits and meeting remaining obligations.



CONFIRM OUTCOMES:

Check sustained operation, usage and benefits.



FIND GAPS:

Identify unresolved issues and follow-on needs.



STRENGTHEN LEARNING:

Capture lessons for future projects and operations.



CLOSE RESPONSIBILITIES:

Ensure all agreed obligations are completed or handed over.

② HOW TO APPLY

1



Choose review timing based on the expected evidence cycle.

2



Define the purpose, scope and key questions for each review.

3



Confirm the owner and invite the right participants from project and operations.

4



Identify the data and evidence required to assess progress.

5



Set the decision outputs and resulting actions.



CONTROL:

A review date alone is not a plan. Define purpose, evidence and outputs.

③ INPUTS & EVIDENCE



OPERATIONAL DATA:

Service performance, usage data, incident and support records from operations.



BENEFITS EVIDENCE:

Evidence of achieved benefits and continued business value from the business owner.



ADOPTION INFORMATION:

User adoption and feedback from the service or product owner.



OPEN ITEMS:

List of outstanding issues, change requests and remaining contractual obligations.



OWNERS & CONTRIBUTORS:

Review owner, decision maker, operations team, business owner and project representatives.

④ PRACTICAL EXAMPLE

Illustrative: A review after one complete monthly reporting cycle checks whether the new solution is running well in operations.



RECONCILIATION QUALITY:

Verify that the new report reconciles as expected.



USER ADOPTION:

Confirm actual use and gather feedback from key users.



OPEN SUPPORT ITEMS:

Review unresolved help-desk tickets and plan their closure.



RESULT:

Agreed actions to address gaps and confirm ongoing use.

⑤ PITFALLS & LIMITS



DATE IS NOT A PLAN:

Setting a date without a clear purpose, evidence and outputs can lead to an unfocused review.



TOO EARLY:

Reviewing too soon may reflect transition effects rather than steady performance.



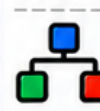
WRONG PARTICIPANTS:

Excluding key operational or business owners can lead to incomplete findings.



LIMITED EVIDENCE:

Relying only on anecdotal input reduces the credibility of results.



SCOPE CREEP:

Attempting to revisit closed decisions can create confusion. Focus on post-closure performance.

⑥ ACTIONS & OUTPUTS



PLACE IN CALENDAR:

Add review dates to the receiving organization's calendar based on the chosen evidence cycle.



ASSIGN RESPONSIBILITY:

Nominate the review owner and decision maker, and confirm participants.



PREPARE AND SHARE:

Collect required data, circulate an agenda and send pre-read material.



RUN THE REVIEW:

Discuss findings, agree actions and confirm any further support needed.



OUTPUTS:

Review record, agreed actions, updated risk or issue items and closure confirmations.



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30 Project Closure Best Practices



CAPTURE EVIDENCE-BASED LESSONS



Turn project experience into specific, contextual learning that others can evaluate and use.

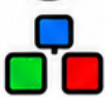
1 PURPOSE & VALUE

Capture what happened, why it happened and what to do differently, using evidence, so future projects can make better decisions.



CONVERT EXPERIENCE:

Turn completed work into practical, contextual learning.



IMPROVE DECISIONS:

Help others avoid repeating problems and apply what works.



BUILD ORGANIZATIONAL KNOWLEDGE:

Create reusable lessons that are easy to find and apply.



APPLY IN CONTEXT:

Include conditions and scope so the lesson is used appropriately.



LINK TO CHANGE:

Connect useful lessons to real actions in plans, processes or project templates.

2 HOW TO APPLY

Use a consistent structure to capture each lesson.



Describe the event and what happened.



Explain the impact on scope, schedule, cost or quality.



Identify contributing factors (root causes).



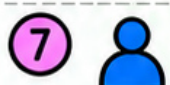
List the evidence that supports the lesson.



State the recommended practice (what to do differently).



Specify conditions of applicability (when it works).



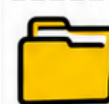
Name the action owner responsible for implementation.

3 INPUTS & EVIDENCE



PROJECT RECORDS:

Plans, status reports, change logs, issue logs, risk logs and meeting notes.



PRODUCT EVIDENCE:

Deliverables, test results, quality records and design documents.



PERSPECTIVES:

Interviews or workshops with team members, users, suppliers and other stakeholders.



OBJECTIVE DATA:

Actual dates, rework records, defect logs and other verifiable facts.



OWNERS:

Project manager captures the lesson. Subject matter experts validate content. Process owner takes forward agreed actions.

4 PRACTICAL EXAMPLE

Illustrative: delayed test access caused rework.



EVENT:

Test environment was not available when system testing was planned.



IMPACT:

Testing started late and required rework, delaying the release.



CONTRIBUTING FACTORS:

Access request not raised early and unclear ownership.



RECOMMENDED PRACTICE:

Confirm test environment access before the test planning gate.



CONDITIONS:

Applies to projects that require shared or external test environments.



ACTION OWNER:

Test environment process owner.

5 PITFALLS & LIMITS



AVOID BLAME:

Focus on what happened and how to improve, not on individual fault.



USE EVIDENCE:

Do not make conclusions without supporting facts.



BE SPECIFIC:

Avoid vague statements such as "communicate better". State the actual action to take.



CAPTURE THROUGHOUT:

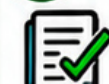
Do not wait until the end of the project. Record lessons as events occur.



RECOGNIZE LIMITS:

Each lesson is context specific and may not apply everywhere. Consider the stated conditions.

6 ACTIONS & OUTPUTS



VALIDATE LESSONS:

Review with relevant participants to confirm the accuracy and usefulness of each lesson.



AGREE ACTIONS:

Convert each useful recommendation into a practical change (process, template, tool or guidance) with a named owner and due date.



PUBLISH & SHARE:

Store approved lessons in an accessible repository so future projects can find and use them.



TRACK IMPLEMENTATION:

Follow up to ensure actions are completed and the changes are applied.



OUTPUTS:

Validated lessons log, agreed action list and updated processes, templates or guidance.



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30 Project Closure Best Practices





MAKE LESSONS REUSABLE



Place useful learning into the workflows and tools where future teams will apply it.

① PURPOSE & VALUE

Turn project learning into practical improvements that future teams can easily find and use.



CAPTURE USEFUL LEARNING:

Focus on lessons that can prevent problems or improve results.



MAKE IT REUSABLE:

Convert learning into clear guidance, templates or checklists.



PLACE IN CONTEXT:

Integrate with existing workflows and tools.



CREATE VALUE:

Saves time, reduces repeat mistakes and builds stronger delivery capability.

② HOW TO APPLY

1



Select the most relevant lessons from the project closure review.

2



Assign a receiving owner for each improvement (e.g. process owner, tool owner or team lead).

3



Update the relevant template, procedure or guideline with the change and clear instructions.

4



Record where the change will be used and how teams can find it (e.g. tool name, folder or link).

5



Communicate the update and include it in normal team workflows.



CONTROL:

Only apply lessons that are relevant to the new context.

③ INPUTS & EVIDENCE



LESSONS RECORDS:

Validated lessons from the project closure review, with descriptions and context.



RELEVANT EVIDENCE:

Project documents, data, issue logs and root cause analysis explaining the lesson.



RECEIVING OWNERS:

Named owners who will update and maintain the relevant tools, processes or templates.



EXISTING TOOLS:

Templates, procedures, checklists or knowledge bases to be updated.



ACCESS INFORMATION:

Location, link or folder where the updated material will be available to future teams.

④ PRACTICAL EXAMPLE

Illustrative example:

The project team repeatedly faced delays during supplier onboarding because new suppliers did not have early access to required systems.



APPLY THE LESSON:

Update the supplier kickoff checklist to include an early access confirmation step.



MAKE IT REUSABLE:

Publish the revised checklist in the procurement toolkit and reference it in the standard onboarding procedure.



RESULT:

Future teams can follow the updated checklist to avoid the same delays.

⑤ PITFALLS & LIMITS



LARGE REPOSITORY:

A long list of lessons is not evidence that learning is being used. Focus on implementation, not just storage.



MISSING CONTEXT:

Include the background, reason and conditions so teams do not apply the lesson mechanically in the wrong situation.



IRRELEVANT OR OUTDATED:

Do not apply lessons that are not relevant to the new context or that no longer fit.



LIMIT:

Lessons are project-specific. Effectiveness depends on context, team maturity and how well the change is adopted.

⑥ ACTIONS & OUTPUTS



TRACK ADOPTION:

Confirm that the updated template, procedure or guideline is actually being used by teams, not just published.



REVIEW EFFECTIVENESS:

Check whether the change reduces the intended problem in future work.



SHARE & COMMUNICATE:

Notify relevant teams and include the update in onboarding or regular communications.



MAINTAIN & UPDATE:

Review and refine the content when new learning or context emerges.



USEFUL OUTPUTS:

Updated templates or procedures, assigned owners, adoption record and a brief review of impact.





PREPARE THE CLOSURE REPORT



Create a concise record of what was delivered, accepted, changed, learned and transferred.

1 PURPOSE & VALUE

The closure report documents the overall outcome of the project. It summarizes what was delivered, accepted, changed, learned and transferred.



CLEAR RECORD:

Confirms final scope, performance and acceptance.



SHARED UNDERSTANDING:

Supports transparency and stakeholder alignment.



CLOSURE DECISION:

Provides the basis for an authorized decision to close the project.



KNOWLEDGE TRANSFER:

Captures lessons learned and remaining obligations for ongoing work.

2 HOW TO APPLY

Compile and structure the report to cover all key areas.

1



State objectives and confirmation that they were achieved.

2



Summarize final scope disposition, including approved changes.

3



Report performance against time, cost, quality and other agreed measures.

4



Reference acceptance evidence for deliverables.

5



List remaining obligations, ownership, and where records are stored.

6



Conclude with the requested closure decision and any conditions.

3 INPUTS & EVIDENCE



DELIVERABLE RECORDS:

Final deliverable register, scope baseline and approved change requests.



ACCEPTANCE EVIDENCE:

Formal sign-off, test results or other agreed evidence of completion.



PERFORMANCE RECORDS:

Schedule, cost and quality records, including cost reconciliation.



LESSONS LEARNED:

Retrospective notes and key insights from the project team and stakeholders.



OWNERS & STAKEHOLDERS:

Project sponsor, customer or user representatives, and owners of continuing actions.



RECORDS LOCATION:

Link to the project repository and where ongoing information will be kept.

4 PRACTICAL EXAMPLE

Illustrative: A project closure report links the deliverable register with the cost reconciliation. It confirms that all planned deliverables were accepted, includes a summary of approved changes, and names owners for three continuing actions.



LINK RECORDS:

Reference the deliverable register and cost reconciliation tables.



NAME OWNERS:

List three remaining actions and assign each to a specific owner with a target date.



SHOW LEARNING:

Include key lessons learned and where they are stored for future projects.

5 PITFALLS & LIMITS



DO NOT DUPLICATE FILES:

The report should point to authoritative evidence rather than repeat every document.



MATCH THE RECORDS:

Completion claims must be consistent with the underlying scope, schedule, cost and acceptance records.



INCOMPLETE INFORMATION:

Missing or unverified evidence can delay the closure decision.



SCOPE CLARITY:

Ensure all changes are approved and reflected. Unresolved items must be listed, not omitted.



PROJECT-SPECIFIC:

The level of detail and content will depend on the project type, contract and organizational requirements.

6 ACTIONS & OUTPUTS



REVIEW ACCURACY:

Share the draft report with relevant owners (sponsor, customer, delivery and support teams) to confirm the facts.



ADDRESS FEEDBACK:

Incorporate comments and resolve any open questions.



SUBMIT FOR DECISION:

Send the final report to the authorized closure authority, including the recommended decision and any conditions.



KEY OUTPUTS:

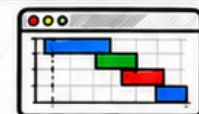
Approved closure report, list of remaining obligations with owners, link to project records, and the formal closure decision.



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30 Project Closure Best Practices



ARCHIVE CONTROLLED RECORDS



Preserve project evidence in an accessible, organized location with appropriate ownership and controls.

1 PURPOSE & VALUE

Keep an accurate, complete and usable record of the project in one controlled location, so information can be found when needed.



PRESERVE EVIDENCE:

Final decisions, deliverables and key communications.



SUPPORT ACCOUNTABILITY:

Provides an audit trail for reviews and future work.



ENABLE LEARNING:

Helps teams reuse knowledge and avoid repeating mistakes.



SINGLE SOURCE:

Reduces time spent searching across different locations.



CONTROLLED ACCESS:

Ensures records are secure, authorized and unambiguous.

2 HOW TO APPLY

Agree and implement the archive arrangements using these steps:

1



Agree which records are required and why.

2



Define classification and a clear folder or metadata structure.

3



Set version status rules to identify final and superseded records.

4



Confirm access rights and security controls.

5



Agree retention and disposal responsibilities under organizational requirements.



CONTROL:

Follow applicable organizational, legal, regulatory and contractual requirements.

3 INPUTS & EVIDENCE



PROJECT RECORDS:

Final reports, approved deliverables, decisions, meeting records and key correspondence.



COMMERCIAL RECORDS:

Contracts, variations, invoices and acceptance records.



OWNERS & ROLES:

Project sponsor, project manager, PMO, information management team and final archive owner.



REQUIREMENTS:

Organizational policies, legal and regulatory obligations, and contractual terms.



EXISTING REPOSITORY:

Approved tool or system where records will be stored (e.g. document management system or shared drive).



EVIDENCE OF SETUP:

Agreed structure, access list, retention rules and ownership documented.

4 PRACTICAL EXAMPLE

Illustrative: project records are organized into separate sections with clear names and version control:



FINAL DECISIONS:

Approved business case, key decision logs and change approvals.



ACCEPTED DELIVERABLES:

Final designs, test results and user handover documents.



COMMERCIAL RECORDS:

Signed contract, variations and final invoice.



SUPERSEDED WORKING DRAFTS:

Previous versions of plans, reports and design drafts, clearly marked as superseded.

5 PITFALLS & LIMITS



NOT EVERYTHING:

Do not retain every copy forever. Keep only agreed records with a clear purpose.



UNCLEAR CLASSIFICATION:

Poor structure makes records hard to find and unreliable.



CONFIDENTIAL INFORMATION:

Do not store sensitive data where unauthorized people can access it.



MISSING OWNERSHIP:

If no one owns the archive, records can be lost or become out of date.



PROJECT-SPECIFIC RULES:

Retention periods and access rules vary by organization, project and legal requirements.

6 ACTIONS & OUTPUTS



IMPLEMENT ARCHIVE:

Set up the agreed structure, apply version status and upload the required records.



TEST RETRIEVAL:

Check that key records can be found, opened and are complete and readable.



TRANSFER STEWARDSHIP:

Assign the archive to an accountable role for ongoing management.



CONFIRM COMPLIANCE:

Ensure access controls and retention rules meet organizational, legal and contractual requirements.



OUTPUTS:

Populated archive repository, owner assigned, access list, retention and disposal rules and confirmation of successful retrieval testing.



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RELEASE PEOPLE AND RESOURCES



End project assignments responsibly while preserving continuity.

1 PURPOSE & VALUE

Release people and resources from the project in a planned and responsible way, while ensuring ongoing obligations are covered.



COMPLETE ASSIGNMENTS:
Confirm agreed deliverables are finished or handed over.



PRESERVE CONTINUITY:
Keep critical work supported after the project ends.



ENABLE TRANSITION:
Move team members to new roles smoothly.



RELEASE RESOURCES:
Return equipment, tools and access when no longer needed.

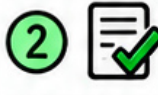


MAINTAIN GOODWILL:
Recognize contributions and close assignments positively.

2 HOW TO APPLY



1 Agree release dates with team members, line managers and receiving project or operational owners.



2 Ensure outstanding work is completed or formally transferred.



3 Arrange knowledge transfer, handover and any required support commitments.



4 Return equipment, licenses and project assets, and revoke unnecessary access.



5 Confirm the release with all parties and document continuing responsibilities.



CONTROL:
Do not release people or resources until ownership transfer is complete.

3 INPUTS & EVIDENCE



ASSIGNMENT RECORDS:
Task lists, deliverables, acceptance records and handover notes.



RECEIVING OWNERS:
Line managers and destination project or operational managers who will take ownership.



KNOWLEDGE TRANSFER EVIDENCE:
Runbooks, user guides, training records and handover logs.



ASSET RECORDS:
List of equipment, licenses, tools and physical items to be returned.



ACCESS INFORMATION:
Accounts, system and facility access to be changed or revoked.



APPROVALS:
Written confirmation from the project manager and receiving owner of the release and any agreed ongoing support.

4 PRACTICAL EXAMPLE

Illustrative: A data analyst has finished their project tasks and is moving to another project.



HANDOVER:
Transfers the runbook, data dictionary and open issues to the new owner.



FOLLOW-UP ROLE:
Agrees a limited follow-up role for a short period to answer questions.



APPROVAL:
Both project managers confirm and document the arrangement.



RELEASE:
Returns the laptop and removes project access on the agreed date.

5 PITFALLS & LIMITS



EARLY RELEASE:
Releasing people before ownership transfer is complete can leave unsupported services.



INDEFINITE AVAILABILITY:
Informal ongoing support with no clear end date is unreliable and can create confusion.



INCOMPLETE HANDOVER:
Missing documentation or inadequate transfer can lead to errors and delays.



LOSS OF ACCESS TOO EARLY:
Removing access before confirmation can prevent necessary support.



LIMIT:
Some roles may need to remain partially engaged until specific obligations are met.

6 ACTIONS & OUTPUTS



CONFIRM RELEASE:
Agree and document the release date with the individual, their line manager and the receiving owner.



COMPLETE TRANSFER:
Ensure knowledge, files and responsibilities are handed over and accepted.



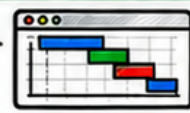
RETURN & REVOKE:
Collect equipment and return licenses and tools. Change or remove system and facility access.



RECORD ONGOING COMMITMENTS:
Document any agreed support, with scope and end date.



OUTPUTS:
Released team members, returned assets, updated access, handover records and confirmation of any continuing responsibilities.



COMMUNICATE FORMAL CLOSURE



Inform stakeholders that the project has ended, what continues, and where to go for future support.



1 PURPOSE & VALUE

Formally tell all affected stakeholders that the project has ended, what continues and where to go for future questions or support requests.



CLEAR CLOSURE:

Confirms the project is complete and approved.



RIGHT EXPECTATIONS:

Explains what continues, who now owns it and how to get support.



SMOOTHER TRANSITION:

Reduces confusion and unnecessary enquiries.



STAKEHOLDER CONFIDENCE:

Shows accountability and keeps the organization informed.

2 HOW TO APPLY

Tailor the closure message to different audiences and include:

1



State the effective date of project closure.

2



Confirm accepted outcomes and what has been delivered.

3



Specify ownership changes for any ongoing services or activities.

4



Provide support routes for future questions or requests.

5



List any remaining actions and when they will be completed.



CONTROL:

Tailor the message to each audience. Use the authorized closure status.

3 INPUTS & EVIDENCE



CLOSURE APPROVAL:

Signed acceptance, closure decision and effective closure date.



DELIVERED OUTCOMES:

Verified deliverables that meet the agreed acceptance criteria.



REMAINING ACTIONS:

List of residual items, handover notes and planned completion dates.



STAKEHOLDER LIST:

All affected groups with their communication needs and owners.



SUPPORT ARRANGEMENTS:

Future support contacts, service owners and access details.



OWNERS:

Project sponsor, project manager, service owner and communications owner to approve and issue the message.

4 PRACTICAL EXAMPLE

Illustrative: different audiences receive tailored information.



USERS:

Receive a clear message that the project is closed, what service continues, and the service support contact for any future requests.



GOVERNANCE:

Receive the closure decision, summary of delivered outcomes and ownership of continuing obligations.



SUPPLIERS:

Are informed of contract closure or transition to business-as-usual, with next steps and contacts.

5 PITFALLS & LIMITS



OVERSTATING CLOSURE:

Do not state that all work or risk has disappeared when accepted residual items remain.



WRONG STATUS:

Use the authorized closure status only, consistent with the project's governance process.



ONE-SIZE-FITS-ALL:

A single generic message may not meet the needs of different stakeholders.



MISSING INFORMATION:

Omitting support contacts or remaining actions can lead to confusion and duplicate enquiries.

6 ACTIONS & OUTPUTS



PUBLISH MESSAGE:

Issue the closure communication through agreed channels (e.g. email, intranet, meeting, or notice) on or after the effective date.



CONFIRM UNDERSTANDING:

Check that key receiving groups understand what has ended, what continues and where to get support.



RECORD EVIDENCE:

Keep copies of the message, recipient lists and any feedback or queries.



HANDOVER FOLLOW-UP:

Ensure remaining actions are tracked to completion by the new owners.



USEFUL OUTPUTS:

Published closure communication, updated contact information and evidence of stakeholder acknowledgement.



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CARD 29 OF 30

30 Project Closure Best Practices





AUTHORIZE AND VERIFY CLOSURE



Obtain the appropriate formal decision and verify that closure records and transfers reflect it.

1 PURPOSE & VALUE

Obtain formal authorization to close the project and verify that records and transfers reflect the decision.



FORMAL DECISION:

Approval from the authorized sponsor or governance body.



COMPLETE RECORD:

Confirms scope, deliverables, costs and outstanding items.



CLEAR TRANSFER:

Hand over ongoing work, assets and responsibilities to the right owners.



VALUE:

Provides a clear end point, accountability and confidence that intended benefits can continue to be realized.

2 HOW TO APPLY

1



Present closure criteria and confirm they are met.

2



Provide acceptance evidence for deliverables, benefits and compliance.

3



List any exceptions and ongoing obligations with named owners.

4



Submit a closure package to the authorized sponsor or governance body.

5



Obtain the formal decision to close and record the approval.

6



Verify systems, records and transfers reflect the decision.



CONTROL:

Closure is valid only when formal approval is recorded.

3 INPUTS & EVIDENCE



CLOSURE CRITERIA:

Agreed definition of done, success measures and acceptance conditions.



ACCEPTANCE EVIDENCE:

Signed deliverable acceptance, benefit confirmation and compliance records.



EXCEPTIONS & OBLIGATIONS:

List of outstanding items, owners, target dates and risk treatment.



RELEVANT OWNERS:

Authorized sponsor or governance body, finance owner, operations owner and any other receiving teams.



PROJECT RECORDS:

Final schedule, budget, change log, asset register, contracts and lessons learned.

4 PRACTICAL EXAMPLE

Illustrative: the sponsor approves closure with two documented obligations transferred to finance and operations, each acknowledged by its owner.



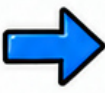
1. SPONSOR APPROVAL:

Review closure package with evidence and approve the project closure.



2. OBLIGATION TO FINANCE:

Remaining invoice reconciliation transferred to finance. Finance owner acknowledges.



3. OBLIGATION TO OPERATIONS:

Ongoing service monitoring transferred to operations. Operations owner acknowledges.



4. RECORD & CONFIRM:

Update project records and confirm both transfers are reflected in the closure log.

5 PITFALLS & LIMITS



NOT A FORMAL APPROVAL:

A celebratory event or the project manager's declaration is not authorized closure.



ONGOING OBLIGATIONS:

Approval does not erase continuing obligations, warranties or support responsibilities.



INCOMPLETE EVIDENCE:

Missing acceptance records or unresolved exceptions can delay or prevent closure.



UNCLEAR OWNERSHIP:

If transfers are not acknowledged by the receiving owners, work may be lost or duplicated.



PROJECT-SPECIFIC:

Closure criteria, evidence and required approvals vary by project and organization. Use what applies to your context.

6 ACTIONS & OUTPUTS



RECORD THE DECISION:

File the formal approval and update the project closure log.



UPDATE SYSTEMS:

Mark the project as closed in relevant tools and repositories.



CONFIRM TRANSFERS:

Verify that assets, documentation and responsibilities are received and acknowledged by the new owners.



RETAIN EVIDENCE:

Keep the final evidence trail, including approvals, acceptance records, transfer confirmations and lessons learned.



FINAL OUTPUTS:

Authorized closure record, updated project systems, confirmed ownership transfers and complete closing documentation.



HOW TO USE THIS GUIDE

Get the most value from the 30 Project Closure Best Practices cards.



1 START WITH A NEED

Select a card that matches a real project decision. Confirm scope, lifecycle, stakeholders and constraints before you begin.



MATCH THE DECISION:
Choose the card that fits your current project need.



CONFIRM CONTEXT:
Clarify scope, lifecycle stage, key stakeholders and project constraints.



USE CONSISTENT TERMS:
Apply the definitions in the cards throughout your project.



READ THE EXAMPLE:
Use the worked example as an illustration, not a promise of results.



SELECT EVIDENCE:
Identify the evidence you need before acting on the guidance.

2 APPLY & REVIEW

Turn the guidance into action. Tailor each card to your project, review the results and keep a clear record.



ASSIGN AN OWNER:
Agree who will apply the card and who will review the result.



AGREE INPUT AND OUTPUT:
Define the data you will use and the expected output for your decision.



RECORD ASSUMPTIONS:
List key assumptions and context that could affect the result.



APPLY AND REVIEW:
Use the card, check the result and decide on actions.



ADAPT TO YOUR PROJECT:
Set a suitable frequency and thresholds for reviews.



HANDLE SPECIAL CASES:
For a denominator of zero use N/A, not zero percent.



KEEP A RECORD:
Protect sensitive information and maintain a version history.

3 ABOUT THIS EDITION

Key details about this guide and how to use it in your work.



BOOK IN THE COLLECTION:
Book 10 of the WikiFree Project Management Collection.



THIRTY PRACTICAL CARDS:
Thirty original learning cards on project closure best practices.



PRACTICAL SYNTHESIS:
Terminology and techniques are a practical synthesis, not an exhaustive standard or formal certification.



DEFINE LOCALLY:
Custom working metrics must be defined locally for your project.



EXAMPLES ARE ILLUSTRATIVE:
Examples show how to apply the ideas. They are illustrative, not guarantees or benchmarks.



FURTHER READING:
More detail and additional guidance appears in panels 4-6.

4 SOURCE 1

APM - Successful Project Handover



WHAT IT COVERS:
Explains key activities, outputs and considerations for a successful handover to business as usual.



WHY IT IS USEFUL:
Provides practical guidance on preparing, agreeing and completing the handover.



RELATION TO THIS GUIDE:
A foundation for further reading. It is not an endorsement of this publication.



Click this panel to open the source.

5 SOURCE 2

APM - Lessons Learned



WHAT IT COVERS:
Guidance on capturing, analysing and using lessons learned to improve future projects and organisational learning.



WHY IT IS USEFUL:
Helps you structure lessons learned activities and turn insights into practical actions.



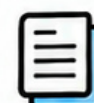
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6 SOURCE 3

PMI - Benefits Realization Framework



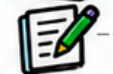
WHAT IT COVERS:
Explains a framework for identifying, delivering and sustaining project benefits beyond closure.



WHY IT IS USEFUL:
Helps link project outcomes to wider organisational benefits and longer-term value.



RELATION TO THIS GUIDE:
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REFERENCE & APPLICATION

30 Project Closure Best Practices

