

# Project Closure and Review

This playbook details the sequential steps necessary for properly closing out a project and performing a post-mortem analysis. The objective is to formally end project activities and capture valuable insights for future reference.

## Step 1: **Closure Notification**

Notify all stakeholders and team members about the project closure. This includes clients, project sponsors, and any members of the organization who were directly involved in the project.

## Step 2: **Final Deliverables**

Ensure all project deliverables have been completed and approved by the client or the project sponsor. Obtain formal acceptance of the final outputs from the relevant authority.

## Step 3: **Release Resources**

Coordinate the release of project resources, which may include human resources, equipment, and materials. Reassign personnel and return any rented or leased equipment.

## Step 4: **Financial Closure**

Complete all financial transactions related to the project, including processing final invoices, closing out project accounts, and ensuring all financial obligations have been met.

## Step 5: **Documentation**

Gather and archive all project documentation such as plans, reports, and correspondence. Ensure all project records are completed and stored in accordance with organizational policies.

## Step 6: **Post-Mortem Meeting**

Schedule and hold a post-mortem meeting with key project team members to discuss the successes and challenges of the project. Encourage open and honest communication to identify lessons learned.

## Step 7: **Lessons Learned**

Document the lessons learned from the post-mortem discussion, emphasizing key areas for improvement and strategies that worked well. This document should be accessible for future project teams.

## Step 8: **Dissemination**

Share the documented lessons learned with relevant parties within the organization for the sake of continuous improvement. Ensure it is added to a central repository if one exists.

## Step 9: **Formal Closure**

Issue a formal project closure report or statement to officially mark the end of the project. This document formally signifies the completion of the project and releases the project team from their roles.

# **General Notes**

## **Confidentiality**

Be mindful of the confidentiality and sensitivity of the project documentation and discussions, especially when they involve clients or proprietary information.

## **Stakeholder Feedback**

Consider gathering feedback from stakeholders as part of the post-mortem process to gain external perspectives on the project's performance.

## **Continuous Improvement**

Utilize the insights gained from the project closure and post-mortem analysis as inputs for continuous improvement practices within the organization.