How to Manage a Project: Part 5

Closure & Handover

You've reached the end of the project! Hurrah. Now is the time to do a clean handover to the operational teams managing the project deliverables going forward and carry out the formal project closure.

In this guide, we'll look at:

- Who you are handing over to
- What materials make up a 'handover'
- A specific look at what matters if you are handing over anything to an IT service team
- 10 things to do on your project's last day
- What questions to ask at project closure
- What goes in a project closure document
- What to do if you are handing over to yourself!

The TL;DR*

Project closure done badly means you are supporting the project forever and a day. If you should be picking up new projects, you need to make sure this project is completely closed off and everyone is comfortable that your work (and the work of your team) stops.

Involve operational teams early so they know what is coming their way.

Plan with the end in mind so you're creating documents and other information that can be handed over.

Write a project closure document that formally signs off the work as complete.

From Projects to Ops

We know that the successful implementation of organisational strategy happens through projects. Project teams make the required changes to help the business move from where it is now to where it wants to be, either through a series of small changes or through larger, transformative change.

But there's a part in that process that has traditionally not worked so well: whether you are using waterfall, agile or a blend of both that fits your needs.

The **handover** from the project team to the operational teams happens during the project closure phase in most project management literature.

You may have a customer representative on the project team to guide the outputs and to ensure that you are on the right track with what you are building. They provide a small link into what the operational team are going to have to live with once the project team move away.

However, the role of the customer or subject matter expert, or even the sponsor, as they too have a vested interest in the outcomes being fit for purpose for use by the rest of their division, is project-focused. You talk about requirements, testing, features, deadlines, and strategic fit. You probably don't have that many conversations about how the product is going to be integrated into the rest of the operations.

Note: I use 'product' in the widest sense: you could be delivering a process improvement, or a set of new functionality for an existing system, or anything else.

Beyond the conversations you have about training and this nebulous thing called 'handover', project teams don't often spend a lot of time planning for closure. When we do talk about closure, it's in relation to celebrating a job well done, archiving project documentation, and getting sign off from people up the chain. These all need to be done, but the biggest thing that equates to long term strategic success is an effective handover to ops.

Involve the Ops Team Early

The operational team is far larger than the person from that department who sits on your project team. There's a whole ecosystem of people who should be involved in the project at some stage in order to make the integration of outputs a success.

These will be different for every project depending on what it is you are creating, but could include:

- The help desk team who will be responsible for taking customer queries about the new system.
- The HR team responsible for training new starters in the process that you have changed.
- The IT team who will have to maintain and support the infrastructure that your new or updated system runs on.
- The business process team who manage and own the business processes.
- The facilities team responsible for looking after the new offices or building you've worked on.

- Any other team with responsibilities for ongoing training, support, or maintenance related to what you have delivered.

Some of these will have been a critical part of your project, but some might not have been. For example, the teams that train users on processes and systems are often, in my experience, overlooked when it comes to project handover. The users themselves get the training they need, but the people responsible for training new starters don't have adequate support to pick up the training and deliver it once the project team have moved on.

Part of your project planning should be identifying and involving these individuals and teams as soon as you can, so that you can understand how they will be impacted by your project's deliverables.

The more you understand what they are going to have to do to support your deliverables, the easier it is to integrate the handover activities into your project. The earlier you can engage them, the more chance you have of building something that they can actually support.

It has been known – and the company concerned will stay anonymous – for an IT support team to get involved so late that the project team built something that couldn't easily be supported on an ongoing basis. That resulted in expensive changes to the support team structure and the product itself that could have been avoided if the right IT teams had been involved much earlier in the project.

Be Adaptable and Responsive

The operational teams are going to be crucial to the successful delivery of ongoing benefits. They need to understand what it is you are giving them and how that can be slotted in to their day jobs of supporting other elements of the organisation's infrastructure. That might be easy; it might need some significant rethinking on their part. Your role is to be adaptable and responsive to their needs, helping them understand what is coming and discussing what they need to be able to pick it up.

You can then build those requirements into your project work. They might benefit from all kinds of things that you are creating anyway, or some that you may have to create as bespoke to them. Some examples are:

- Train the trainer materials
- User guides
- Handbooks
- Wiki entries
- Product videos
- How to guides
- Crib sheets
- Checklists.

They might also benefit from access to your project knowledge repository and lessons learned so they don't have to learn the lessons you already have. You can give them this as soon as it is set up, or prepare a digest for them.

Use Their Handover Process

IT teams in particular often have a process for handing a service into live. There might be a sign off checklist or a process to work through that ensures you have covered everything required in order for them to do a good job of supporting it.

If you don't know if something like this exists, ask for it. Or perhaps help them create it with the support of your PMO? If you work in a business that regularly puts new processes and systems into production it will be very beneficial to standardise what's required for this handover process.

From an IT perspective, items to include in this kind of handover to production would include:

- Briefing and full handover to service desk team
- Sign off from information governance or security team
- Infrastructure diagrams delivered to infrastructure team
- Process to create, manage and delete new user accounts documented and handed over to the team that manages user access.

And so on. You can do the same for any functional, operational team that regularly receives the products of your project. The more you can get into the habit of involving them early and streamlining the handover, the easier it will be for you to walk away as a project manager confident that the business is going to get strategic value out of your project.

In summary, you need to work as an integrated team: project and ops. You're all on the same side, and you're all working for the same outcome: the successful integration of project deliverables into the organisation so that the benefits tumble into your lap as a reward for your hard work.

Tip: The earlier you involve them, the easier all this is. Don't leave it too late to get your ops colleagues onboard.

As the handover to IT support functions is particularly important, and, in my experience, most prone to not being done very well, let's look at some advice now for working with your IT colleagues.

5 Tips for Working With the IT Helpdesk

IT departments can be great places to get experience as a project manager. Much business change involves an element of technology and that's why I've written in the past about there being no such thing as an IT project.

Projects with an IT element are wide-ranging. Any kind of software refresh, upgrade, app development, new functionality and so on involves a broad group of stakeholders. The group that often gets forgotten is the IT Helpdesk.

You might know them as the Service Desk, the Technical Support Centre, Tech Services, IT Support or something else but they are the people who are responsible for dealing with user queries when something isn't working with your computers. They log your problem and fix it if they can, passing it off to another specialist team if they can't do it themselves.

They are the people who will be fielding calls from the users of any IT application or system that you are putting in. They need to know the basics of your project so they can better respond to queries. Ideally, they need to know everything possible about it so they aren't just logging calls, they are solving the problem there and then, on the call.

Why You Need the IT Helpdesk on Your Project

You might have done a fantastic job as the project manager during the project, involving everyone, setting up training, using your communications plan to inform and educate your stakeholders and end users. That effort stops when you leave the project.

For projects with an IT element, the IT bits will be picked up by an operational team. You should be involving them in the project life cycle, from solution design to delivery and all the bits in between, but they won't be the first line support for your end users.

You need them to understand, be sympathetic, fix problems and maintain credibility in the system by helping users to get back up and running again as quickly as possible when they hit an issue.

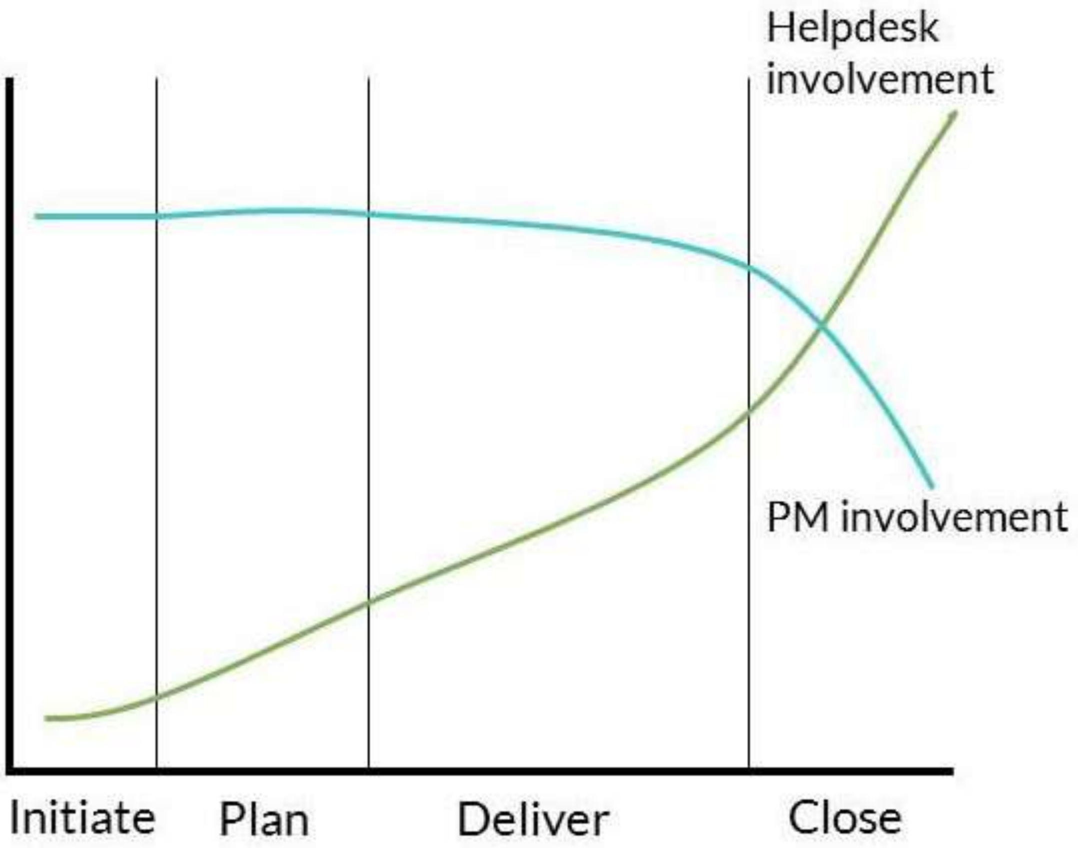
Here are 5 tips for working effectively with the IT Helpdesk on your project.

1. Involve Them Early

Don't wait until you are at the point of handover to operations during the Closure phase of your project to involve the IT helpdesk.

Start talking to them as early as you can so that you are building up their knowledge and awareness of what is coming their way. Scale up their involvement over time. Ideally, by the end of the project they should be able to lead on many of the productionising elements, or at least be very directive about the best way to approach the handover.

The graph below shows how this can work in practice.



2. Get A Single Point of Contact

This doesn't need to be the helpdesk manager. You could work with a helpdesk analyst as the single point of contact. This person is the workstream lead for introducing the project's deliverables to the support environment.

Having one person to go to makes sense as you don't know exactly what is going to be involved. It's a good opportunity for IT helpdesk staff members to see how projects work and for them to get a taste of what goes into making a new service ready for launch.

3. Delegate Planning

Once you have identified (or the helpdesk manager has identified) the right person to lead their involvement in the project, you can delegate the planning of their tasks and engagement to that person.

This is the same as you would do for any other workstream leader. Your workstream leader should establish the IT helpdesk responsibilities as they relate to the project. They can plan this out with their colleagues and, of course, you can be there to help as you would with other team members.

4. Plan The Go Live

Plan the launch of your new IT solution together. There are two aspects to this: the go live of the actual deliverable, which is likely to be supported by the project team from Day 1, and the go live of the IT helpdesk process whereby users are asked to stop calling the project team and to route queries to the helpdesk instead.

You might have it set up smoothly enough to have both those happening on the same day, but often you'll want to transition into support gradually, for example if you have a pilot period running. The support offered from the helpdesk during the pilot could look different to the role you expect them to play longer term.

Either way, make sure that you are involving your helpdesk colleagues in the go live planning. At the very least, the helpdesk needs to know your go live milestones in case any calls come through to them that are about your project.

Even if users aren't supposed to be ringing them yet, you can guarantee that someone won't have got the memo. Don't make your helpdesk team look stupid by not giving them information they need to respond to the basic queries.

5. Don't Walk Away Too Soon

Now that you've invested so much time into making your handover so smooth it's tempting to bail out of the project as soon as you can. Your aim should be to walk away, but not before you are confident that everything is working as expected and that the operational team can manage without your involvement. So don't walk away the day after go live.

This takes some planning because your manager or the PMO team might be keen to pull you off that piece of work as soon as the last milestone is hit and onto a new project. Make sure that you've put 'transition into live service' or something similar in your project plan and it is baked into your schedule.

You might not need all the time you've allocated if the IT helpdesk transition is smooth (which is should be, if you've invested time and effort into making it successful up to this point). In that case, you can step away earlier.

10 Things For Your Project's Last Day

OK, so you've arrived at the end of the project. It's the last day. Your timesheet has 7 solitary hours left to book against this work. It feels like the end of an era, but it isn't over just yet. There are still more tasks to get through before your role project managing this project is complete.

Here are 10 things that you should do on your project's last day.

1. Finish The Handover

There will be some areas of your project that you haven't been able to brief the operational team on until the project is closed. Today's the day to get that final appointment with the people who will be running with the products you have delivered and make sure that they understand everything.

Let them know where to find:

- A log of all the decisions that were taken on the project and the reasons why
- Minutes of project team meetings
- Email archives
- Contracts including draft versions and the discussion trail around what changes were made
- Change logs including anything that wasn't incorporated into the project but that would make a good enhancement for the future.
- Any other useful documentation.

2. Archive Documents

Move all your electronic documents to an archive. This can simply be a folder called 'Closed Projects': there's no need for anything fancy. You still need access to the files in case anyone has questions or you want to reuse anything for a future project. But you don't want all those documents clogging up your working folders when you move on to your next projects.

3. Update Status

Update the status of all items on electronic To Do lists as closed. They are closed, aren't they? If not, they should be included in your handover so that the operational team can pick up the work.

4. Circulate Lessons Learned

You have probably had one or more lessons learned meetings by now. Whether you've shared the output in a wiki, as a document or in some other format, everyone should know where to find it. Today is a good day to circulate that lessons learned information again, so it is fresh in their minds when they move on to a new project.

It's possible that you haven't done your final lessons learned meeting – your team may want some reflection time between the official last day of the project and sharing their thoughts, or you may not have been able to get everyone together before project closure. That's fine, but make sure that your handover includes this outstanding work.

5. Save Important Emails

However good you are at using shared network storage for your files you have probably ended up with important emails in your inbox. You can save these as individual files in your project folders. You can also save attachments on the network or an online file storage system in an appropriate folder.

You could package up all the emails that relate to the project and store them as an archive with your other project artefacts, but if you are anything like me, a lot of the traffic won't be relevant to the operational team or is a duplicate of what is already in the main project files, so I only save the essential ones.

6. Tell Everyone

You'd be surprised at how many stakeholders don't know that your project is closing today. Get in touch and tell them. A quick email will do, although it's a nice touch to call your major stakeholders personally. Leaving a message is fine, as long as you include your contact details so they can get back to you.

Let them know who they should get in touch with now their main point of contact isn't you. If you don't, they'll assume they should still approach you with questions and you'll never feel as if you've moved on to new work.

If particular stakeholders have been really helpful in getting the job done, now is the time to thank them. You can do this in writing via email and copy in their manager if you think that's appropriate. Sometimes it's good to let people further up the chain know their teams have done an outstanding job.

7. Circulate Project Closure Document

Your project closure document won't be of interest to all stakeholders but for those who do want to see it, sending it out today draws a line under your project work and helps reinforce the fact that the project is over.

The project closure document should include:

- A description of your project: normally the same 3-line summary you've used on all the other project reports
- The project's objectives and success criteria
- A statement of how well you met each of the objectives and success criteria along with any variances
- Sign off from the sponsor and yourself.

Depending on your Project Management Office systems you'll either be producing an electronic document (use a template – don't create one from scratch) or an entry in a workflow management or project management system that is equivalent to completing an online form.

The PMO will want a copy and you should also send one to the project sponsor and any other senior stakeholders. Copy your immediate project team in and save a copy for your own records as well. Finally, make sure that the operational manager taking over the deliverables from you also has a copy.

8. Call Your Sponsor

Your sponsor will have been copied in other documents and emails that you've been sending today, like the project closure report and the lessons learned documentation. But you should still give them a ring.

Thank them for their involvement and support. Highlight anything that you feel they should know that has come out of your handover to the operational team. If you are moving on to a new project talk to them about that so they know where to find you if they have any future opportunities.

Don't skip this step, even if your working relationship with your sponsor wasn't that great. Ending the relationship on a positive, professional note will be how the sponsor remembers you and that can be important for your career development in the future.

9. Close Budgets and Contracts

Your project budget and contracts are probably already closed by now so this item is really about making sure that everything is done. The easiest way to do this is to talk to the person you've been dealing with in Finance and make sure they've got everything they need to shut down the project budget.

You may want to do some vendor performance analysis on the suppliers you used to inform teams using those same suppliers in the future. A quick note about how you found working with them and what their performance to the contract was can make a big difference for future procurement exercises.

This can be stored with your lessons learned paperwork or passed to the person in the Project Management Office who deals with vendor relations.

10. Thank the Team

Finally, don't forget to say thank you to your project team! It's better to do this in person if you can, so get them together for a final debrief and to say thank you. If you have a corporate recognition scheme hopefully you have applied to this in good time and will be able to distribute any tokens at this meeting.

Don't worry if you can't get everyone together. Call around the people who aren't able to be there, thank them and ask what they are going on to next. You never know when these people might turn up on a future project team (or even as a future project sponsor) so it helps your professional network to stay in touch.

Depending on how long you've been together, splitting up the team can be quite emotional. I have left high performing project teams in the past and felt sad that I wouldn't have the chance to work with those people again. If you feel anyone will have difficulty adjusting to their new roles then you could have a quiet word with them or their manager.

Oh, and there's one more thing…

11. Celebrate!

Saying thank you isn't really enough in my opinion. If you've completed your project successfully, you should celebrate! Frankly you should celebrate even if you didn't complete your project successfully because the organisation would have learned something valuable and that's a good thing too.

Celebrations don't have to be big and expensive. You can go out for drinks after work, or take everyone to lunch. Or everyone can bring a dish and you can have an office picnic. The social and recognition elements of celebrating are more important than how much you spend or where you go.

This is actually quite a lot of work to fit into the last day on your project. For short projects, it's possible to get it all done and wrap up the project the same day. If your project has been a larger, more complex piece of work then your closure activities may take place over a couple of days. It's better to take the time to get them right and accept doing the tasks over several days than try to complete everything in a rush and miss a few steps on the way.

Questions to Ask During Project Closure

The project closure phase is typically quite short, and the majority of activities relate to tying up loose ends. During the closure phase, it's helpful to have some questions in mind so you can get answers from relevant people and make sure everything is finished off neatly.

Here are some important questions to ask during project closure, in no particular order.

1. Where is the training material?
2. Where is the other project documentation and is it in a state to be handed over?
3. Who in the operational team will receive the handover?
4. And when it is going to be?
5. How are benefits going to be tracked? Or, if you've started tracking them already, how is it being done?
6. Who is tracking benefits or who will be responsible for it going forward?
7. And for how long are you going to track benefits?
8. Did you meet the success criteria for this project and if you haven't checked yet, do you know what they are? (For more on this, see my definitive guide to project success criteria)
9. Did you hit any other key performance indicators?
10. How much did the project cost?
11. Have you carried out a lessons learned meeting or your last retrospective?
12. How long did the project take?
13. Has the business owner signed off the project from a quality perspective?
14. Does everyone on the project team have something else to go on to do now?
15. Is the project closure document completed?

The Contents of a Project Closure Document

So what goes in your project closure document? This document summarises:

- What the project delivered
- How the project performed against time, cost, quality and scope measures i.e. were you late, over-budget or struggling to get a quality result?
- Any outstanding risks, issues and actions at the point of closure
- The location of project files
- Anything else the person receiving the handover needs to know.

Of all the documents, this is the most important one to get formally signed off and approved. Without the project sponsor agreeing to the project being closed, **the project is not closed.**

You'll end up doing ad hoc work and support for months. (Don't ask me how I know.)

Here's an outline for what the document should look like.

Project Closure Document

Project Name:	*Insert project name*
Project Sponsor:	*Insert name of project sponsor*
Project Manager:	*Insert your name*
Date:	*Insert today's date*
Version:	*Insert version number (if you prefer, move version to the footer)*

General notes: Delete all the text in italics, replacing it with your own text relevant to your project. Remember to update the project name in the footer. Delete any sections that aren't relevant; add in extra sections you know your executives will expect to see. Keep the information as brief as possible and as clear as possible. There are no points for showy language!

Project Outline

Describe the project – what it is that you were doing? How did you do it? For example, state that the project had a pilot, followed by two delivery phases, each introducing new functionality etc. Make it brief. You can copy this information from the Project Charter

Objectives & Success Criteria

The project had the following objectives:

List the objectives:

- *E.g. To deliver a new software solution to 500 staff*
- *E.g. To increase sales by 6%*

- *E.g. To increase productivity in the team so that 10 applications can be processed per day*
- *Etc*

The below table sets out the success criteria for the project and how far the project was successful in achieving them.

Edit the below table to spotlight the success criteria for your project based on objectives. One objective can have many success criteria.

Objective	Success criteria			
	Description	Target	How met	Variance
To increase productivity	*Reduction in workload and in time spent dealing with ad hoc queries, measured in hours per week*	*25% reduction in admin time*	*Test results show that the project achieved a 20% reduction in admin time*	*5%. It is possible that this target will be met when the productivity gains are fully realised. The tests will be carried out again by the operational team in 6 months*

Project Manager's Summary

Edit the example text below to describe the situation at project closure.

The project completed on time and on budget but unfortunately was not able to deliver all the scope items due to resource constraints during the final months. Over 60 hours of staff training was completed and the outstanding requirements can be delivered as part of a Phase 2 project next year.

Outstanding Actions

The following actions are accepted by the operational team:

- *List any tasks that were not completed as part of the project and need to be picked up by the customer*

Outstanding Issues

The following issues are accepted by the operational team.:

- *List any issues that remain outstanding at the point of project closure and that need to be actively managed by the customer team. You can embed/attach the issue log here or summarise the outstanding work*

Outstanding Risks

The following risks are accepted by the operational team:

- *List any risks that remain open at the point of project closure and that need to be actively managed by the customer. Include any details from the risk log, or embed the risk log as an attachment here*

Budget Summary

Include a summary of your project costs. Copy the information from your budget spreadsheet at the point of closure.

Forecasted spend	Actual spend	Variance
£10,000	*£8,000*	*-£2,000*

The reason for the variance in the budget was *[insert reason]*

Milestone Summary

A full project timeline will be produced once the project moves into the planning stage. At present, an indicative timeline for this work is as follows.

Milestone	Forecast date	Actual date
List the main milestones for the project e.g. start of a phase, end of a phase, signing a contract, key decision points etc	*Insert original forecasted date (or latest baselined date)*	*Insert actual date the milestone was achieved*

Summary Lessons Learned

The project lessons learned documentation can be found in *[insert link to relevant folder or embed the lessons learned meeting minutes]*.

A summary of the lessons learned is as follows:

List the top lessons learned from the project.

Approvals

This document has been approved by:

Name	Role	Date
Insert name	Project Sponsor	*Insert date*
Insert name	Project Manager	*Insert date*
Insert any other people who need to approve this document especially the team leader/manager of the team receiving the deliverables/customer		

Electronic copies of approvals have been stored in the project files.

What happens if you are handing over to yourself?

Some projects you do for yourself, and you are the person going to be responsible for managing the output moving forward. This is often the case in small teams where you don't have a dedicated project manager and you are doing the PM role alongside your day job. You plan and carry out the work, then you still have to close it down and make sure you've got all the elements in place before you can say that the project part is finished.

A clean and thoughtful handover (to yourself) and closure will still make your life easier. In months to come, you'll be confident that you've got the documentation, checklists, user guides and anything else you need to use whatever it was you created. Plus, you'll have carried out a lessons learned exercise so you'll be able to improve your project approach next time you take on a similar piece of work.

Don't let 'it's only me' be an excuse for skipping the formal project closure steps.

Action Steps

- Plan adequate time in your project schedule now so that you don't rush closure.
- Think about the teams you will be handing over to. Are they adequately involved already? If not, how are you going to bring them on board?
- Draft your project closure template (yes, you can do that now). Look at what areas you don't currently have answers for and work out how you are going to get the answers.