Bringing Your Project to a Successful Conclusion

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CASE-1

- Brad's first excursion into the curious world of the project manager has been going fairly well. Sure, there were some rough spots, but all in all, Brad is proud of the job he's done so far. Project Apex is now nearing what he hopes will be a smooth and successful conclusion.

- But just when Brad thought he'd be able to kick back and watch Project Apex coast to the finish line, things are beginning to heat up. Attendance at his team meetings has been steadily tapering off. He's having some difficulty getting in touch with some people who were trying to wrap up their last few activities. Brad has been getting questions about what the customer may be expecting, and he can't seem to get any answers.

- Actually, Brad is beginning to think that he may be losing his grip a bit. The project plan doesn't seem to be a great deal of help now—at least compared to how much he relied on it throughout project execution. He thinks about calling his unofficial mentor, Ted. He changes his mind, though, feeling that he has probably bothered Ted enough already. Why don't we see what kind of help *we can give Brad. . . .*

Early Termination: Not As Bad as You Think

- Before we direct our attention at Brad's situation, let's imagine for a moment that management cancelled Project Apex right in the middle of things. As strange as it may sound, this is a situation that should actually happen more often than it does. There's a good reason why this is true.

- How the most fundamental objective of projects is to achieve business results. Actually, it's quite simple—projects are *investments that your organization makes,* from which they expect a return. In real life, investments can sometimes go bad. The same thing can certainly apply to a project.

- Conditions can change in such a way that the project ceases to become the winner it seemed to be at the outset. Simply stated, management no longer expect the project to have the business impact required to make it wise to keep spending money on it. In many cases, a project such as Apex should be terminated, though in far too many cases, it isn't. There are at least three reasons why early project termination does not occur, even though it should:

Falling Asleep at the Wheel.

- **You should be testing project viability—** or financial justification—on a continuous basis throughout the life of the project. Some organizations don't do this very well. Others don't do it at all. Once management approves a project, it simply moves ahead until it's completed.

- In today's fast-paced and constantly changing environment, it's always possible that there will be changes that undermine the original business case for the project. That means that you need to reconsider the economic viability of every project periodically. And the organization should terminate projects that have lost their business case underpinnings.

Fear of Failure

- **In many people's minds—and in many of the** organizations I am familiar with—early project termination has somehow become linked with *failure.*

- *This couldn't be any further* from the truth. Early project termination (for the right business reasons) is actually smart management. It's really just a process of reallocating funds from a relatively poor investment to a relatively good one.

- I am at a loss to explain why that's viewed as a failure, but I can tell you that I have observed this phenomenon often.

Inertial Pride

- **Once a project is underway, a certain amount of** "inertia" is created by the work that has already gone into a particular project. Pride swells, and a feeling that "we must see this thing through 'til the end" begins to take command of peoples' minds. Unfortunately, it can dull them to a point where judgment is impaired.

- Even though a team (or organization) senses that a project is on shaky ground, emotional issues such as *not being viewed as quitters, and finishing what we started,* seem to become part of the process of determining whether or not to terminate the project. Couple these feelings with the sweat equity that's been invested, and under these circumstances the project is almost certain to continue even when it doesn't make sense any more.

The Earlier the Better

- Normally, there should be no shame in canceling a project that's already under way.

- The only exception occurs when the project was originally initiated in a flurry of excitement, or was launched for the wrong reason in the beginning, and someone is just now getting around to figuring out that it's a loser.

- The sooner a bad project is killed, the better—from the standpoint of wasted time, money, and resources, at least. That's why you *should perform* business cases as early in the project life cycle as possible.

Management Challenges at the End of the Project

- OK, now back to Brad's situation. As the end of his project draws near, Brad finds himself facing a completely new set of challenges, as you undoubtedly will, as well.

- These challenges will test your ability to bring the project to a successful conclusion, even if everything has been going well until then. Most of the challenges you'll face will fall into one of three broad categories:

Technical Challenges

- Start-up problems with new products or new designs
- Thorough identification and agreement on all remaining deliverables
- Loss of control of the charges to the project
- Difficulties in securing useful project historical data

Project Team Challenges

- Loss of team functionality as some members complete their tasks

- Loss of interest in tasks such as documentation and "administrivia"

- Attention is diverted as members transition into new projects or other work

- Fear of no future work; hence, foot-dragging

Customer Challenges

- Agreement on what outstanding commitments still exist
- Absence of a clear hand-off strategy
- Change of responsible personnel at critical transition points
- Unavailability of key personnel

The "Art" of Project Closure

- Many of the challenges that surface at the end of your project will be rooted in behavioral issues. This will test your *leadership ability. You must* remain on the lookout for behavioral cues that will indicate the existence of one or more of these challenges (remember our discussion about the "art of project management"?).

Key Elements of Successful Project Closure

- The close-out phase of the project should be given as much or more *project management attention as* any other phase of the project. Bringing a project to a successful conclusion requires close attention to several different managerial functions. More than any other project phase, project closeout requires an extremely diverse set of technical, organizational, and leadership skills. Here are all of the things that you must do well to maximize your chances of ensuring the successful completion of your project:

Ensure that the project will deliver what was promised

- Actually, this should have been addressed throughout the entire execution and control phase. You must continually monitor the functionality and quality of the project deliverables and protect these from degradation.

- From the project closeout perspective, make it your objective to avoid last-minute surprises.

Actively lead the project team through a confusing period of time.

◉ **The key term here is** *actively. Make your visibility greater* at this time than at any time since the beginning of the project.

◉ Your project team may begin to disintegrate as a functional unit when the project nears completion. Communication will become more difficult for you.

◉ You may not be able to count on a captive audience each week at your team meetings.

◉ Organizing people and things will become increasingly difficult.

◉ All of these issues require that you maintain a high profile and assume a position of strong leadership.

Ensure timely completion of the "odds-and-ends" (the punch list activities).

- **As mentioned previously, there will come a point** where you can just about abandon the original project plan.

- When that happens, you'll find it helpful to focus everyone's attention on the specific work items required to get the job done.

Prepare for the transition into the next phase in the overall project life cycle.

- **There is ordinarily** an afterlife—at least from the perspective of your project. The deliverables your project produces are normally accepted and used by a customer.

- One of the basic rules of managing projects is that you have the primary responsibility for ensuring that the "handoff" to the customer or user goes smoothly.

- In fact, don't be surprised if this requires your involvement—on a limited basis, at least—after the traditional completion of the project.

Secure consensus that the project has met the completion criteria.

- As mentioned previously, you should establish criteria for completion *at the beginning of your project.*

- *If you ignore this* issue until the end of your project, disagreements may become significant in scope.

- Resolving some problems late in the project can involve significant rework.

Obtain customer acceptance and verify customer satisfaction.

- This is not done enough—at least not in a formalized way.

- You should strive to create an almost "ceremonial" atmosphere when addressing customer acceptance and customer satisfaction.

- Just as a formal kickoff meeting communicates project initiation, a formal session where you secure customer satisfaction and acceptance should signal successful project completion in a positive and upbeat way.

Ensure that the project records reflect accurate "as-built" data.

- **This issue may include a wide range of documentation. It** refers to the process of updating any and all documents related to your project to reflect the reality that exists at the end of the project. This ensures the existence of accurate historical data, which can be of great value to project teams in the future. Project files (most notably the project plan) should be updated to reflect final "actuals" in terms of cost, schedule, functionality, and quality.

- Design documents and specification sheets should be updated to reflect how the deliverables actually look and perform. In many cases, this refers to engineering drawings. Contractual and procurement records should reflect any modifications to agreements or contractual exceptions.

As-built data

- **The documentation** and information that explains how the project was carried out, valuable for understanding the project management process for future new projects or when this project needs to be taken up again in the future.

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Transfer What You've Learned to Others.

- **The process of performing** a "lessons learned analysis" is described below.

- Whether you perform a full-fledged analysis or simply jot a few notes, it can be important and useful to transfer any critical information you've accumulated or lessons you've learned to anyone who may benefit from your recently acquired wisdom.

Acknowledge the Contribution of Contributors.

- **Acknowledging** those who helped you achieve project success is not just a nice thing to do; it's a strong building block for the future—yours as well as the organization's. People who work hard and make significant contributions can actually become de-motivated if their work goes unrecognized.

- This can hurt the overall effectiveness of the organization. At a more personal level, if you gain a reputation as someone who appreciates a job well done—and you show it— you're more likely to garner the resources you want on your future projects.

Bring the Project to Efficient Administrative Closure.

- **This may** include a wide range of administrative issues. For example, you need to address accounting issues, such as closing open charge account numbers.

- It also includes ensuring that all outstanding invoices have been submitted, and all bills are paid.

- It may also include closing out rental or lease agreements, as well as disposing of or storing any leftover materials.

Show Them That You Care

- Study after study shows that personal recognition means more to people than nearly any other type of reward.
- Of course financial rewards are nice, but knowing that others appreciate your work is the most meaningful thing to most people.
- It's a personal affirmation that tells them they matter—something all people crave.

Project Completion Checklist

◉ **Customer Issues**

- ❏ Complete all deliverables
- ❏ Install and test deliverables
- ❏ Prepare operating manual
- ❏ Prepare maintenance manual
- ❏ Train customer's personnel
- ❏ Agree on level of follow-up support
- ❏ Conduct formal acceptance review with customer
- ❏ Verify customer satisfaction

Project Completion Checklist

- **Organizational Issues**
  - ❏ Summarize learning's; communicate to the organization
  - ❏ Prepare final technical reports
  - ❏ Evaluate project performance
  - ❏ Conduct final review with management
  - ❏ Prepare project historical files and place in archive

Project Completion Checklist

- **Personnel Issues**
  - ❏ Recognize/reward team performance
  - ❏ Write performance evaluations for project team
  - ❏ Assist in reassignment of project personnel

Project Completion Checklist

- **Administrative/Other Issues**
  - ❏ Dispose of leftover project material
  - ❏ Close down temporary site operations
  - ❏ Submit final invoices
  - ❏ Forward all final payments
  - ❏ Close out project charge codes and work orders

The Lessons Learned Process

- You will probably find the lessons learned process to be most productive when it is oriented toward identifying problems you and your team encountered, and suggesting ways to avoid similar problems in the future. You can accomplish this by asking the following questions for each identified problem:

What was the problem and its impact?

- Get a description of the perceived problem and its specific effect(s) on the project. In other words, find out what happened to the project as a result of the problem.

What caused this problem to occur?

- **Find out the** known or perceived root
- cause of the problem. If unknown, the cost of securing this knowledge needs to be weighed against its potential benefit.

Why was the problem undetected?

- **This involves** a search for possible flaws in monitoring, control, or reporting methods.

- *Caution: This question can also be sensitive, as it may involve* individual performance problems.

Can this problem be eliminated in the future?

- **Here you're asking** for suggestions on specific steps aimed at precluding a future occurrence.

- Total elimination is not always possible; however you can come up with strategies for reducing the probability of it happening again.

If it cannot be eliminated, are there ways it could be detected?

- Here you're looking for suggestions on how the team can alter monitoring, control, or reporting methods in ways that allow for earlier or more reliable detection of the problem.