Project Closeout

Designing an Electronic Performance Support System (EPSS)

for

WidgetMart

2345 London Avenue

London, NJ 00001

April 20, 2013

Table of Contents

|  |  |
| --- | --- |
| [Introduction](#page3) | p. 3 |
| [Closeout Activities Matrix](#page3a) | pp. 3-4 |
| [User Accounts and Passwords](#page5) | p. 5 |
| [Post Project Review Process and Forms](#page5a) | p. 5 |
| [Project Team Directory](#page5b) | p. 5 |
| [Project Deliverables](#page6) | p. 6 |
| [Project Costs](#page6a) | p. 6 |
| [Project Schedule](#page6b) | p. 6 |
| [Lessons Learned](#page7) | p. 7 |
| [Recommendations](#page8) | p. 8 |
| [Project Acceptance & Sign off](#page9) | p. 9 |

**Introduction**

This document contains a checklist of all activities required to properly closeout all the five phases of WidgetMart’s Electronic Performance Support System design project (EPSS). In addition, specific forms are provided for closeout activities that require a more detailed process. Since the project is still in progress most of the information in this document has not been completed. All the closeout processes will be conducted once the project is completed.

**Closeout Activities Matrix**

|  |  |  |
| --- | --- | --- |
| **No.** | **Activity Name** | **Person Responsible** |
|  | Update systems requirement document and archive | Ellen Lockhart |
|  | Update training materials to ensure synchronicity with the newly developed system and archive | Deanna Troi |
|  | Ensure all activities for Phase 1 are completed | Davey Jones, Joise Roberts |
|  | Ensure all activities for Phase 2 are completed | Davey Jones, Elim Garak |
|  | Ensure all activities for Phase 3 are completed | Davey Jones, Geordie LaForge |
|  | Ensure all activities for Phase 4 are completed | Davey Jones, Elim Garak |
|  | Ensure all activities for Phase 5 are completed | Davey Jones, Geordie LaForge |
|  | Ensure all issues on the issues log are closed | Davey Jones |
|  | Ensure that all risks identified have been mitigated or never arose | Davey Jones |
|  | Record the hours and budget spent on each activity and archive | Davey Jones w/input from team |
|  | Reconcile any budget variations | Davey Jones w/budget admin. |
|  | Provide copy of project financial data to the budget administrator | Davey Jones |
|  | Archive financial data | Davey Jones, budget admin. |
|  | Ensure developers and consultants are paid according to the contract agreement | Davey Jones, procurement manager |
|  | Obtain sign off for each phase of the project that is completed | Davey Jones |
|  | Obtain sign off for the completion of the entire project | Davey Jones |
|  | Transition the automated system (the new EPSS) to the production group for ongoing maintenance/operation | Elim Garak, Geordie LaForge, Josie Roberts |

|  |  |  |
| --- | --- | --- |
| **No.** | **Activity Name** | **Person Responsible** |
|  | Provide training to the production group on the new system (EPSS) | Elim Garak, Geordie LaForge, Deanna Troi |
|  | Archive the project plan in its entirety (WBS, scope, resource allocation, schedule, cost estimation, communications) | Davey Jones |
|  | Archive all status reports | Davey Jones |
|  | Archive all electronic communications | Davey Jones |
|  | Archive all paper communications | Davey Jones |
|  | Clear out training materials from conference rooms and return to storage | Tim Sisko, Barry White |
|  | Dispose of or put in storage (according to WidgetMart’s guidelines) any extra training materials as well as any proprietary information | Tim Sisko, Barry White |
|  | Obtain all systems development specifications and codes – archive | Ellen Lockhart, Davey Jones |
|  | Reset user IDs and passwords to sensitive/ proprietary systems | Josie Roberts, Davey Jones |
|  | Conduct project audit for quality and scope | Auditors to be determined |
|  | Conduct stakeholders’ satisfaction presentation | Davey Jones |
|  | Handle intellectual property according to WidgetMart’s policies and guidelines | Davey Jones |
|  | Conduct post project review | Davey Jones w/team |
|  | Document Lessons Learned | Davey Jones w/team |
|  | Prepare “thank you” letters and/or performance reviews for team members’ personnel files | Davey Jones |
|  | Announce official project closeout to all stakeholders in all the countries | Davey Jones |
|  | Organize a luncheon for team members and clients/sponsor | Davey Jones |
|  | Release employees to their functional groups | Davey Jones |
|  | Release Contractors | Davey Jones |

**User Accounts and Passwords**

As part of the EPSS design project closeout process, various user account accesses and authorizations must be created and disabled. Currently the personnel from Deep Space Nine (DS9) LLC, external vendor, possess the user accounts and access necessary for EPSS. These accounts and passwords will be disabled and new ones enabled for use by WidgetMart personnel.

|  |  |  |
| --- | --- | --- |
| **User Account** | **Deep Space Nine (DS9) LLC.** | **WidgetMart** |
| EPSS Developers | Elim, Geordie | EPSS production group |
| EPSS Database Administrator | Elim, Geordie | EPSS IT Project Leader |
| User | Elim, Geordie | EPSS employees (users) |
| Other |  |  |

**Post Project Review Process (and Forms)**

**Project Team Directory**

|  |  |  |  |
| --- | --- | --- | --- |
| **Name** | **Title** | **Project Role** | **Contact** |
| Jon Luc Picard | WidgetMart CEO | Client/Sponsor | [JP@widgetmart.com](mailto:JP@widgetmart.com) |
| Davey Jones | Project Manager | Project Manager | [DJ@widgetmart.com](mailto:DJ@widgetmart.com) |
| Kira Nerys | Universal Widget Director | Stakeholder/Client | [KN@universal.com](mailto:KN@universal.com)  [JD@buymore.com](mailto:JD@buymore.com) |
| Jadzia Dax | BuyMore Director | Stakeholder/Client | EL@widgetmart.com |
| Ellen Lockhart | Merchandising Consultant | Business Systems Analyst, ID | JR@widgetmart.com |
| Josie Roberts | System Consultant | Training, ID | TS@widgetmart.com |
| Tim Sisko | Translation Expert | Client Interface, Training | BW@widgetmart.com |
| Barry White | Change Management Consultant | Training, Process Implementation | EG@external.com |
| Elim Garak | Developer | Programmer/Analyst | JL@external.com |
| Geordie LaForge | Developer | Programmer/Analyst | DT@external.com |
| Deanna Troi | Instructional Design Consultant | Training, ID | [JP@widgetmart.com](mailto:JP@widgetmart.com) |

**Project Deliverables (Planned vs. Actual)**

This form will be used as part of the post project review process to document the project’s deliverables and any deviations. This form should be completed for each phase of the project – five in total.

|  |  |  |
| --- | --- | --- |
| **Planned Deliverable** | **Actual Deliverable** | **Summary** |
| Phase 1 |  |  |
| Phase 2 |  |  |
| Phase 3 |  |  |
| Phase 4 |  |  |
| Phase 5 |  |  |

**Project Costs**

The budgeted cost for WidgetMart EPSS design was $380,000. This cost was broken out by project phase in the following chart with actual costs compared to the planned/budgeted cost.

|  |  |  |  |
| --- | --- | --- | --- |
| **Project Phase** | **Budgeted Cost** | **Actual Cost** | **Comments** |
| Phase 1 |  |  |  |
| Phase 2 |  |  |  |
| Phase 3 |  |  |  |
| Phase 4 |  |  |  |
| Phase 5 |  |  |  |

**Project Schedule**

This section describes WidgetMart’s EPSS design project planned schedule and how the project measured against this plan.

|  |  |  |  |
| --- | --- | --- | --- |
| **Project Phase** | **Scheduled Completion** | **Actual Completion** | **Comments** |
| Phase 1 |  |  |  |
| Phase 2 |  |  |  |
| Phase 3 |  |  |  |
| Phase 4 |  |  |  |
| Phase 5 |  |  |  |

**Lessons Learned From WidgetMart EPSS (by knowledge areas)**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Category** | **Issue Name** | **Problem/Success** | **Impact** | **Recommendation** |
| Scope Management |  |  |  |  |
| Time Management |  |  |  |  |
| Cost Management |  |  |  |  |
| Quality Management |  |  |  |  |
| Human Resources Management |  |  |  |  |
| Communications Management |  |  |  |  |
| Risk Management |  |  |  |  |
| Procurement Management |  |  |  |  |
| Project Integration Management |  |  |  |  |

**Recommendations**

This section describes any recommendations helpful for more effectively managing a project. It will include recommendations obtained as a result of the project audit as well.

**Project Acceptance**

**WidgetMart Electronic Performance Support System (EPSS)**

This document establishes formal acceptance of all the deliverables for the WidgetMart Electronic Performance Support System (EPSS) project. The WidgetMart EPSS project has met all the acceptance criteria as defined in the requirements document and project scope statement. A project audit has been performed to verify that all deliverables meet performance and product requirements. Additionally a product evaluation has been performed and determined that all products meet the quality and functional requirements defined within this project.

Transition to Operations/Production has been completed. The live EPSS system has been handed over to Operations/Production and the transfer of knowledge from the Project Team to Operations has also been completed. All training has concluded and the System’s documentation has been handed over to the Production group.

The Project Manager is authorized to continue with the formal close out of this project. The closeout process will include a post-project review, documentation of lessons learned, release of the Project Team, close out all procurements and archive all relevant project documents. Once the closing process is completed the Project Sponsor will be notified and the Project Manager will then be released from the project.

**Approved by the Project Client/Sponsor**

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Jon Luc Picard

WidgetMart CEO

Rationale Statement

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Case # 25 – Designing an Electronic Performance Support System for WidgetMart**

**(Ertmer & Quinn, 2007)**

The project closeout phase according to (PMBOK Guide, p. 99) is “the process of finalizing all activities across all the Project Management Process Groups to formally complete the project or phase.” The term Process Groups refers to the five life phases of a project described in (Portny, Mantel, Meredith, Shafer, Sutton, & Kramer, 2008, p.76) as Conceive, Define, Start, Perform, and Close. This project closeout document formally establishes the completion and acceptance (by the client/sponsor) of the WidgetMart EPSS project.

The WidgetMart EPSS project closeout has taken into consideration most of the administrative and logistical closures of the project noted in the Virginia Information Technologies Agency (2006) – one of our learning resources this week. The WidgetMart EPSS project closeout process includes: identification of all the closeout activities, post project review processes, lessons learned and future recommendations, and formal acceptance by the client/sponsor. The lessons learned is categorized into the various elements of project management as defined in (PMBOK Guide, 2008) – scope, time, cost, quality, human resources, communications, risk, procurement, and integration, so as to identify the area that needs more focus on future projects. Additionally, the closeout indicates the release of the project team personnel (including contractors) to their appropriate functional areas. It also ensures all procurement processes are finalized.

It should be noted that the project is still in progress. The processes (and forms) in this document will be completed, and the information distributed accordingly, when the project is completed in its entirety.

**References**

Ertmer, P. A. & Quinn, J. (2007). *The ID CaseBook. Case Studies in Instructional Design.*

Upper Saddle River, NJ: Pearson Education, Inc.

PMBOK Guide (2008). A Guide to the Project Management Body of

Knowledge (PMBOK® Guide). (p. 99). 4th ed. Newton Square, PA: Project Management Institute, Inc.

Portny, S. E., Mantel, S. J., Meredith, J. R., Shafer, S. M., Sutton, M. M., & Kramer, B.

E. (2008). (p. 76). *Project Management: Planning, scheduling, and controlling projects*. Hoboken, NJ: John Wiley & Sons, Inc.

Virginia Information Technologies Agency. (2006). *Project Management Guideline: Section*

*5—Project closeout phase* (CPM-110-01). Retrieved on April 20, 2013, from

<http://www.vita.virginia.gov/uploadedFiles/Library/CPMG-SEC5.pdf>

**Note:**

Project Closeout template is courtesy of [www.ProjectManagementDocs.com](http://www.ProjectManagementDocs.com), free project management templates, and has been modified to fit the WidgetMart EPSS project.