Project Management Essentials

**Project Closure**

Template

August 31, 2021

# Template Description

## Purpose

The Project Closure document formalizes the completion of the project.

## How to Use

The Project Closure Template documents confirmation that all in scope business objectives have been met and necessary project items have been finalized. This includes making sure all listed project deliverables have been completed and project documentation saved in suitable shared storage. This template also allows you to document how outstanding actions/issues are to be handled.

## Best Practice

Project Closure approval is needed by the Project Sponsor, Business Owner, and the PPMO/PMO Director to demonstrate approval of project closure and agreement that business objectives have been met. It is important to demonstrate that the deliverables have met the business objectives in the closure document, as well as identify unmet deliverables.

Note: The PM Essentials Project Closure Template is customizable as you see fit, on a per project basis, meeting specific needs of the project and/or your organization’s policies. The below sections are suggestions but can be tailored as applicable.

\*\*NOTE: Please remove this page when creating your Project Closure\*\*

# Project Closure for [Project Name]

Submit the document to the Project Sponsor, Business Owner, and PPMO/PMO Division Director; and archive this closure document with the project artifacts once completed.

| Approver Name | Title | Signature | Date |
| --- | --- | --- | --- |
|  | Project Sponsor |  |  |
|  | Business Owner |  |  |
|  | PPMO/PMO Division Director |  |  |

# General Information

Provide basic project information.

| **Project Start Date** | [MM-DD-YYYY] | **Project Close Date** | [MM-DD-YYYY] |
| --- | --- | --- | --- |

| **Role** | **Name** | **Phone** |
| --- | --- | --- |
| Business Owner |  |  |
| Project Manager |  |  |

# Business Objective Achievement

Determine if all business objectives identified at the initiation of the project have been achieved at the conclusion of the project.

| **BC ID\*** | **Business Objective** | **Achieved** **Y/N** |
| --- | --- | --- |
|  |  |  |
|  |  |  |
|  |  |  |

\*Business Case ID as identified in section 4.4 of the Business Case.

# Business Closure Checklist

Identify the deliverables and activities which the business expected to achieve.

| # | Item | Completed Y/N |
| --- | --- | --- |
| 1 | Were all project deliverables completed or realized? |  |
| 2 | Were all expected performance standards satisfied? |  |
| 3 | Are there plans to verify the business case? (An example is a study conducted six months after project completion which verifies if the business is experiencing the benefits expected.) |  |

# Project Management Closure Checklist

Identify and complete any project closure activities.

| Deliverable | Date Completed | Storage Location |
| --- | --- | --- |
| Project documentation and artifacts posted on suitable shared storage, including Business Case, Charter, Requirements, Project Change Requests, Milestone Timeline, Work Breakdown Structure, Budget, etc. Make sure that all information needed for project performance evaluation (i.e. baselines) are captured. |  |  |
| Product documentation (technical specifications and design documents) have been posted in suitable shared storage, knowledge transfer has occurred, and “operations” team(s) have accepted ownership of the project or product. |  |  |
| All lessons learned exercises have been executed and records stored. |  |  |
| All purchases and financial transaction records completed and stored. |  |  |
| All contractual documents and sign-offs completed. |  |  |
| [Add rows as needed] |  |  |
| Project closed in project portfolio. |  |  |

# Outstanding Actions Items and Issues

Identify any outstanding actions or issues to be addressed. These should be of a minor nature.

| Action Item and/or Issue | Expected Transition and/or Resolution |
| --- | --- |
|  |  |
|  |  |
|  |  |

# Feedback

If you have any questions on PM Essentials or on project management practices, please contact DIR’s Project and Portfolio Management Office at [ppmo@dir.texas.gov](mailto:ppmo@dir.texas.gov).