Project Closure - Complete

09/16/2024 1:32 pm EDT

This document covers the steps required to close a project where all the deliverables on the Statement of Work have been completed. The Project Manager (PM) will confirm with the customer that the deliverables have been met and no outstanding issues remain. The customer is given a timeline to confirm prior to project closure.

The flowchart linked here details the process

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After all the deliverables in the SOW have been completed, the PM will send the customer a request to confirm the project can be closed. Follow the Project Completion Confirmations document for instructions on sending the completion request and follow up requirements.

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Once the customer confirms, or the steps to gain confirmation have been completed, the following steps should be followed before closing the project:

1. Ensure all project tasks have been completed or appropriately dispositioned
    1. Ensure all time has been posted to the task and assigned resources are aware no additional time can be posted to the project
    2. For any tasks not required delete the task
    3. For any task required but not delivered - set task List to no value
        1. Tasks not completed with List value other than No Value will show on Late Task Reports
2. Estimated Go-Live Field: does not have date of 12/31/2099. Reset to actual go live date, or remove
3. Go-Live Date Field: has the date the customer was live with the product
    1. For new implementations – when the live database was delivered
    2. For services hours only – the date the hours were consumed
    3. For all other projects – the date the customer could use what was purchased
4. Project Chatter: Status Update - the customer has confirmed complete or not responded to the request.
5. Dependency: None
6. Recovery Plan: Project Closed
7. Status: Green
8. Status Reason: Active

9. PM Estimated Percent Complete: 100%
10. Project Stage: Complete

The project is now closed and an automated message with that status will be sent to:

Director of Professional Services

Project PM

Support Manager for the project product type

Sales Manager for the project product type

Opportunity Owner

Sales Ops

Customer Account Manager

AR Billing team

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