

# Project Closure - Terminated by Customer

09/16/2024 2:51 pm EDT

[Purpose](#)

[Requesting Closure](#)

[Termination Review](#)

[Termination Approved](#)

[Termination Declined Revision History](#)

For customers who have either stopped responding to all attempts to move the project forward, or refusing to move forward and their contract does not include hours that expire, the project may be approved to close as Terminated by Customer and removed from the Professional Services schedule.

This process walks the Project Manager (PM) through the process of requesting permission to close the project as Customer Terminated.

Before using this process, the PM should confirm the following:

- For customers with contracts that include hours that expire:
  - Use Process [Project Closure - Hours Expired](#) instead of this Terminated by Customer process
- For customers with contracts that do NOT include hours that expire:
  - The [Project Stalled - Customer Nonresponsive](#) process has been attempted and has not been successful and fully documented in the project

The Director of Professional Services will review the project with the PM to determine if it should move forward to a second review by the Leadership team. Decisions on the validity of closing the project as Terminated by Customer will be made at the Senior Leadership level and only the Director of Professional Service can close a project under this status.

The Project Closure – Terminated by Customer process flow can assist with the required steps to close a project under Terminated by Customer. View the flow [here](#)

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Once the PM determines all efforts have been exhausted to restart the project without success and confirms the customer's contract does not include hours that expire, the PM will follow the steps below:

1. Update the project fields:

1. Status Reason = Escalated
  2. Dependency = Director of Professional Services
  3. Chatter = notes on attempts to restart the project
  4. Ensure all project tasks and timecards are up to date
2. Schedule and hold a review session with the Director of Professional Services
    1. Discuss all facets of the project relevant to supporting project termination are included in the Chatter notes
    2. Update any missing information requested by the Director of Professional Services to aid in the Leadership review of termination

If the project is approved to move to the Leadership review:

1. Ensure all tasks are up to date including timecards entered to assist with cost analysis
2. Ensure the Go Live date is populated if the customer has gone live
3. Update the Project
  1. Project Status Reason = Terminated by Customer
  2. Project Owner = Director of Professional Services

If the project is not approved for cancellation:

1. Update Project Fields:
  1. Status Reason = Active
  2. Dependency = None
2. Continue to drive the project

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For projects the Director of Professional Services determines warrant review for termination, the following steps are all completed by the Director of Professional Services:

1. Schedule Termination Review Meeting – 30 min
  1. Attendees:
    1. President

2. Sales Operations

3. Director of Professional Services

2. Include meeting feedback to project Chatter

1. Cause for delays

2. Product Issues

3. Recommendation on refund amounts if warranted

4. Other supporting information to assist with the decision

If a credit is warranted, the [Project Closure - Contract Cancellation](#) should now be followed instead of this process.

The Director of Professional Services will then follow the steps to terminate the project, or continue the project based on the decision reached in this meeting:

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If the Leadership team approves termination:

1. Send customer notice of termination

1. Template: [Project Terminated](#)

2. Update the Project in the following order:

1. Recovery Plan: Project Terminated

2. Dependency: None

3. Go Live Date: populated if the customer is live on the product

4. Project Owner: original PM

5. Project Status Reason: Terminated by Customer

6. Project Stage: Terminated by Customer

The project is now closed. The auto notification will be sent regarding closure as Terminated by Customer.

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If the Leadership team does not approve termination:

1. Update project Chatter with information on the next steps to resume the project
2. Status Reason: Active
3. Owner: reassign to original PM

The PM will continue to work with the customer to complete the project.

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