

Project Closure Types Defined

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Contents

[Purpose](#)
[Closure Types](#)
[Complete](#)
[Expired](#)
[Contract Cancellation](#)
[Customer Terminated](#)

Purpose

Professional Services projects can be closed using several different closure types. This document discusses the different closure types and provides links to the steps required before a project can be closed under each type

[Return to Contents](#)

Closure Types

Although the goal for every customer project Professional Services delivers is to fully deliver the project, each has the potential to deviate from the intended path. To help Project Managers (PMs) navigate the various scenarios that may arise, the following closure types have been defined:

- [Complete](#)
- [Expired](#)
- [Contract Cancellation](#)
- [Customer Terminated](#)

Defining the different types also allows for better accounting transaction flow, reporting, and filtering when auditing time to value, or other project audits.

[Return to Contents](#)

Complete

This should be the normal path for the majority of projects; all defined project deliverables have been met, there are no outstanding issues, and the customer has either responded to a completion request notification or has not responded within the allotted time frame.

See [Project Closure - Complete](#) to close a project where all deliverables have been met.

[Return to Contents](#)

Expired

Projects that have Professional Services hours sold with an expiration date can be closed without delivering the hours in full if the customer does not USE the time before the hours expire. Time scheduled after the expiration date can only be approved by an expiration date extension.

The customer will be notified at 90/60/30 day intervals before the expiration date that they have unused hours. At the expiration date, the project will be closed, all revenue recognized, and the customer notified. The customer will then need to purchase additional hours if they need further time.

See [Project Closure - Hours Expired](#) to close a project where the hours have expired and if an expiration date extension is warranted.

[Return to Contents](#)

Contract Cancellation

On occasion, the customer may determine the project is not in their best interest to move forward and has requested credit. Once the credit is approved and the credit memo generated, the project can then be closed as Contract Cancellation by the Director of Professional Services only.

See [Project Closure - Contract Cancellation](#) for the process to request closure for a project where the project will not move forward and the customer has been credited in full.

[Return to Contents](#)

Customer Terminated

For projects where the customer is nonresponse, AND the PM has already followed the process for [Project Stalled - Customer Nonresponsive](#) without the customer moving forward, the project may be moved into the queue for consideration for Customer Terminated.

See [Project Closure - Customer Terminated](#) for the process to request closure of a project where the project will not move forward and NO credit is warranted

[Return to Contents](#)