

Formal Closing Document



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The 'formal closing document' is a report created in the closing phase of a project that details completion criteria, outstanding items, and closure activities.

Using the 'Formal Closing Document'

Step 1: Required information for the formal closing document is determined at the start of a project by the project manager. Generally, this includes completion criteria, outstanding items, and closure activities, but additional relevant fields may be added at the discretion of the project manager.

Step 2: The fields related to completion criteria are populated. These summarise the deliverables, expected benefits, success criteria from the initial project charter, and assess whether they have been realised.

Step 3: The fields related to outstanding items are populated. These detail any remaining actions that must be conducted as a result of change requests, or potential risks that have yet to be identified or mitigated.

Step 4: The fields related to closure activities are populated. These document and plan activities that have yet to be undertaken and include the handover of deliverables or documentation, termination of supplier contracts, the release of resources to their usual purpose, and communication of the projects closure to all stakeholders.

Step 5: A project review is undertaken during which overall project success is evaluated. The performance is compared to the original plans and the lessons learned are identified and documented.

Instructions for Use

1. Determine the information that should be contained in a formal closing document that meets the requirements of your organisation. Generally, completion criteria, outstanding items, and closure activities are included.

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2. Upon closing a project, complete the document. First, populate the fields related to completion criteria. These should summarise deliverables, expected benefits, success criteria from the initial project charter, and assess whether they have been achieved.

3. Populate the fields relating to outstanding activities. These should detail any remaining actions resulting from change requests or potential risks that have yet to be identified or mitigated.

4. Populate the fields relating to closure activities. These document and support the planning of activities that have yet to be undertaken. They should include the handover of deliverables or documentation, termination of supplier contracts, release of resources to their usual purposes, and communication of the projects closure to all stakeholders.

5. Undertake a project review evaluating its performance compared to the original plans. Identify and document lessons learned to inform future project delivery.

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