

Paying Forward at Project Completion



PM File by David Elam

Projects eventually come to an end, the enjoyable ones sooner than the painful ones. In either case, there is little time for reflection because the next project demands our attention. But we can contribute to the success of future projects and project team members by using a simple, structured program to bring our projects to a close. It is in our best interest to develop project close-out procedures that mirror the rigor of our project planning and thereby provide a springboard for future project success. Although the close-out process and emphasis will vary with each organization, the following elements are appropriate for consideration in any project close-out process.

1. Conduct a project close-out meeting. Another project meeting? Yes, but using a format appropriate to the needs of the project. For some projects, a face-to-face meeting of key program participants is appropriate. For others, an e-mail or phone call may suffice. In any case, the objectives of the close-out meeting are to ensure that
 - contractual, performance, and financial obligations have been satisfied;
 - personnel performance issues have been captured and documented;
 - project problems and solutions have been identified to prevent their recurrence on future projects;
 - project successes or innovations have been identified;
 - project scope and benefits have been captured and documented;
 - project information is appropriately documented and archived;
 - client or stakeholder satisfaction issues are properly addressed; and
 - follow-on opportunities or needs are identified.
2. Close out the financials. The project cannot be closed until all financial issues have been resolved. During the close-out process, it is appropriate to review
 - contract terms to ensure that all have been satisfied;
 - labor costs to make sure that all costs have been posted properly; and
 - contractor, consultant, and vendor invoices to ensure that all invoices have been received and that invoiced amounts are correct and properly posted to the project. This is also a convenient time to insure that contractor, consultant, and vendor files are in order with respect to terms, insurance, bonds, guarantees, warranties, and submittals.

Financial reviews at closing are appropriate for both the

buyer and seller of project services. These reviews reduce the possibility that lingering project costs will show up at a later date, resulting in a need to either re-open a closed project to post and pay the costs or write-down additional costs if they cannot be properly posted and recovered.

3. Document the project. Most of us will oversee, manage, or participate in dozens, perhaps even hundreds, of projects in a year. And while the details of those projects are at the forefront while they are active, they rapidly fade once a project is completed. Yet those details are essential for establishing the value of our work and are worth summarizing and recording. At a minimum, we should document the project scope and deliverables, the performance period, the cost of the project, the value the project produced, and the personnel involved in the project. If we work for an engineering or consulting firm, project summaries can be useful sources of information for future assignments. If we work for industry, project summaries can demonstrate the value of our services to the organization, providing useful information for annual and corporate social responsibility reports. Project summaries will prove extremely valuable when writing a future proposal, planning a future project, updating a resume, or demonstrating the value that an operation or individual provides.
4. Document the lessons learned. Each project provides a learning experience. Some project managers learn the same lessons over and over and do nothing to change project delivery processes. Other project managers learn lessons, but fail to share their experience with others. In either case, these project managers and their organizations operate at a competitive disadvantage. Yet other project managers, working in organizations that support process improvement, learn lessons that enable them to improve project delivery processes for future projects throughout their organizations. The project closing is an excellent time to review project successes and failures, examine the delivery systems surrounding those successes and failures, and identify service delivery changes that can eliminate failures or advance successes. Often the systems for documenting project successes and failures are already in place, but not used. For example, most organizations utilize purchasing systems that facilitate documentation of vendor or contractor performance. Yet it is easy to neglect these systems in our hurry to close a project. As a result, an unsatisfactory provider can remain active in the procurement system

while a stellar provider remains undifferentiated from a marginal one.

5. Document the roles and the results of project participants. As project managers, we typically rely on team members that are supervised and reviewed by others. We can help team members and their supervisors by offering feedback on project performance throughout the project and at project closing. This feedback can help team members improve performance, develop new skills, and advance in their careers. Importantly, documented work experience information can also be helpful to team members when securing professional credentials or demonstrating capabilities for future assignments. This may be one of the most difficult tasks for a project manager to perform at project closing because there can be many project team members and no system in place to support the process. Yet, this task can produce a dedicated and motivated workforce and a future pool of project managers. For this reason, project managers and resource managers are best served by working together to develop an employee feedback system that easily and effectively captures team member project performance issues.

6. Cull the files. We have a tendency to keep everything during the life of the project. As a result, our electronic and hard copy files swell with duplicate, redundant, outdated, and sometimes conflicting, information. While

it makes sense to retain this information during the life of the project, this information is not always helpful once the project is closed. For this reason, we should—subject to the recordkeeping requirements of our organizations or project contracts—take the time to eliminate unnecessary, confusing, duplicate, or redundant information from project files that would not allow a third party to recreate an accurate and representative picture of the project as it was ultimately delivered.

Admittedly, these tasks contribute to the burden of the project manager, will produce limited immediate value, and will typically go unnoticed on a given project. Nonetheless, these are the tasks that drive future project work, demonstrate project value, develop effective project teams and future project managers, create financial success, build defensible projects, and drive improved project performance. Consider structuring your project close-out process to include these tasks. You may not see a return on the project you're closing, but you'll most certainly see the payback on future projects. em



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