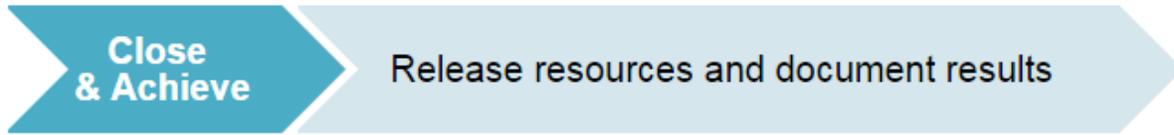




Phase 5: CLOSE and ACHIEVE



During CLOSE and ACHIEVE the product is accepted and transferred to the support organization, or a decision has been made to suspend or cancel the project. This phase also provides the opportunity to assess the project and develop lessons learned and recommended practices to be applied to future projects. For measures that have been achieved and are stable, the measure becomes new operating standard. Continued achievement of the new standard is managed through the agency’s normal performance management process. Key indicators may be publicized internally and externally so that agency personnel and stakeholders know and understand their role in contributing to the results. Honest and clear messages regarding positive and negative trends, corrective actions, and values realized help support the initiative and aid in fostering a commitment to the change. The completion of CLOSE and ACHIEVE phase activities signifies the formal ending of all project work.

CLOSE and ACHIEVE Expectations	Templates, Tools, and Guidance	Participants
<p>Team recognition is a must</p> <p>Take lessons learned seriously</p>	<p><u>CLOSE and ACHIEVE Guidance:</u> <i>Sponsor Checklist _ MONITOR, CONTROL, CLOSE and ACHIEVE</i></p> <p><u>Close Phase Review (Lessons Learned, most recent KPI report)</u></p> <p><i>Note: Additional deliverables may be required by an agency’s PMO</i></p>	<p>Sponsor Project Manager Organizational Change Manager</p> <p>Steering Team Stakeholder(s) Process Owner(s)</p> <p>Transition Support Lead*</p> <p>optional*</p>

1. The project manager, organizational change manager, and sponsor complete the documentation of lessons learned. This activity may also include contractor personnel, stakeholders, steering committee members, and other project participants. Lessons learned are the knowledge gained during a project and show how project events were addressed or should be addressed in the future for the purpose of improving future performance. They are documented experiences that can be used to improve the future management of projects.

During the project, lessons learned may be documented as part of issue resolution. During the CLOSE and ACHIEVE phase, a broader audience should be contacted for lessons learned and these (as well as those related to project issues) should be documented in a manner consistent with the lessons learned guidance.

2. The project team also documents potential future enhancements, or changes made to bring expected future performance of the project in line with the project plan. Document potential future enhancements in a Word document and attach it to the project documentation.
3. The project manager archives all documentation in a secure, long-term repository of data, documents, configuration or other information. Archives are typically stored on secure, long-term media in accordance with applicable document and media retention policies and rules. The project repository may be retained in Workfront or agency project management software.
4. The sponsor and project manager submit the lessons learned and most recent KPI scorecard to agency governance for the final phase gate review. Assuming the project is still on target to achieve its objectives, the project can be formally moved to a “completed” status. At this point, the project manager should mark the project as complete.