WIKIFREE
THE HANDOVER JOURNAL 42

# How to Close a Project and Capture Lessons Learned



# Close with evidence and ownership

*Finishing the last task does not automatically complete the transition.*

## Define the purpose

Project closure confirms delivery status, acceptance, operating handover, remaining obligations, records and lessons through the agreed governance.

## Stock-count case

A retailer has introduced a stock-counting pilot in three stores. Devices, process changes, training and support must be accepted and handed over.

## Use the journal

Prepare closure early, reconcile what was authorised and delivered, assign residual matters and obtain the appropriate decision. Continue benefit measurement through its agreed owners.

### TAKE IT TO YOUR PROJECT

List the evidence required to say the project can close.

# Agree closure criteria early

*The team should understand what completion will mean before the end arrives.*

## Define the conditions

Clarify acceptance, quality, operating readiness, supplier and financial completion, records, outstanding-item treatment and authority for closure.

## Stock-count case

Each store needs the counting workflow verified, designated staff prepared and a support route accepted. Delivery of devices alone does not meet the full scope.

## Use the criteria

Review them at suitable milestones. If the scope changes, update the relevant acceptance and closure basis through the proper decision route.

### TAKE IT TO YOUR PROJECT

Choose a criterion that could otherwise be forgotten at the end.

# Reconcile scope and deliverables

Closure needs a current view of what was promised and what exists.

## Use the controlled basis

Compare the authorised scope, approved changes, deliverable register and acceptance evidence. Identify omissions, defects and work explicitly excluded or deferred.

## Stock-count case

The third store has devices and configuration but lacks its final training evidence. Record that gap rather than treating all three sites as equally ready.

## Make the decision visible

Complete required work or seek an appropriate authorised disposition. A closure report should not quietly redefine the scope to match what is finished.

### TAKE IT TO YOUR PROJECT

Trace each major deliverable to its completion evidence.

# Confirm acceptance

*The relevant recipient needs the evidence and authority to accept the result.*

## Use the agreed process

Present outputs and verification records against the criteria. Record accepted, conditional or not accepted as the actual process permits, with reasons and follow-up.

## Stock-count case

Stores one and two pass the agreed scenarios. The third store's training gap remains visible and needs completion before the planned readiness decision.

## Preserve the record

A project team's statement that work is done is different from the authorised acceptance evidence. Keep the current record and its referenced version.

**TAKE IT TO YOUR PROJECT**

*Identify who can accept one deliverable and what they need to see.*

# Plan the operating handover

*The result needs a capable owner after the project team leaves.*

## Transfer the essentials

Agree responsibilities, access, support, maintenance, assets, configuration, guidance and ongoing funding as relevant. Verify that the receiver can use the information.

## Stock-count case

Operations receives device records, current procedures, the supplier contact and the incident route. Support practises a failed-sync scenario before accepting the service.

## Check the handoff

Sending a folder is not evidence that the receiver is ready. Confirm understanding and unresolved conditions through a useful rehearsal or review.

**TAKE IT TO YOUR PROJECT**

*Name an operating responsibility that needs explicit acceptance.*

# The All-in-One PM Templates Bundle

**940+** Premium Templates • One Payment • Lifetime Access

# $49

**SAVE 94%**

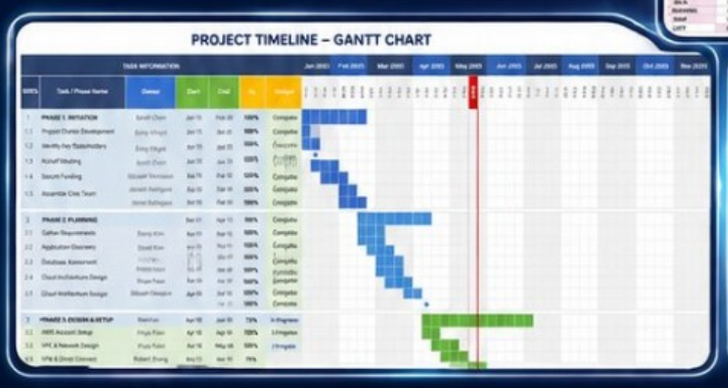
Worth $3,300+













EXCEL & GOOGLE SHEETS | PROFESSIONAL & RELIABLE | AUTOMATED DASHBOARDS | SAVE TIME & STAY ON TRACK | INSTANT ACCESS DOWNLOAD

**GET LIFETIME ACCESS**

# Resolve remaining readiness gaps

*The end of a project is a decision point for incomplete work.*

## Use an action record

State the gap, consequence, owner, completion evidence, timing and authority for any proposed deferral. Keep it connected to acceptance and risk.

## Stock-count case

The training lead completes the third-store rehearsal and records the result. The service owner then confirms that all three stores meet the agreed readiness conditions.

## Check the status change

Update closure evidence from the actual result. Do not close an action solely because its due date passed or its owner said they were busy.

### TAKE IT TO YOUR PROJECT

Write a completion condition for one remaining action.

# Close supplier commitments

*Project closure and commercial completion need coordinated records.*

## Review the agreement

Check accepted outputs, invoices, claims, retained amounts, licences, assets and continuing obligations with the authorised contract owner.

## Stock-count case

The device supplier has an open support commitment and a final invoice. Reconcile the acceptance and payment evidence under the actual agreement before recording the commercial position.

## Keep ownership

Some warranties or support duties may continue after project closure. Assign their monitoring and contact route rather than assuming they disappear.

### TAKE IT TO YOUR PROJECT

Identify one supplier obligation that survives the project's end.

# Reconcile the financial position

*A final cost statement needs a consistent scope and cutoff.*

## Use the records

Review actual costs, accruals, commitments and remaining financial obligations with finance. Distinguish final actual cost from an estimate that still includes uncertain charges.

## Stock-count case

A late training invoice has not posted. Finance confirms the appropriate accrual or disclosure so the closure report does not understate the position.

## Explain differences

Compare the authorised basis with the final or current expected result and state the reasons. Keep evidence rather than adjusting figures to match the budget.

**TAKE IT TO YOUR PROJECT**

Find one remaining charge that could change the reported final cost.

# Capture lessons throughout

*Useful learning should be recorded while the evidence is still available.*

## Use specific observations

Record what happened, its context, cause or contributing factors, consequence and recommendation. Include effective practices as well as difficulties.

## Stock-count case

A representative early sync trial exposed an identifier problem before all stores migrated. The team records why the trial was useful and when future projects should repeat it.

## Keep the learning usable

Avoid vague statements such as “communicate better.” Describe a change someone can actually apply to a future decision or process.

### TAKE IT TO YOUR PROJECT

Write one lesson with a specific future action.

# Run a constructive lessons review

The review should improve understanding and future work.

## Prepare the discussion

Bring relevant people, facts and outcomes. Create space for different perspectives and investigate the system rather than reducing the discussion to blame.

## Stock-count case

Delayed support access affected the rehearsal. The group traces when the dependency became known and why the approval route was unclear.

## Choose the follow-up

Agree the practical recommendation, owner and place where it will be used. A list of observations without an adoption route may not change anything.

TAKE IT TO YOUR PROJECT

Turn one review finding into an owned improvement.

# Convert lessons into action

*A lesson is more useful when it reaches the next person who needs it.*

## Choose the destination

Update a relevant checklist, template, standard, training or knowledge source through the appropriate owner. Make context and limitations easy to find.

## Stock-count case

The rollout checklist now requires a confirmed support-access test before the rehearsal. The operating lead owns the change and checks it on the next site rollout.

## Inspect adoption

Confirm that the change was implemented and useful. A stored document's existence is not the same as organisational learning.

### TAKE IT TO YOUR PROJECT

Name the process owner who can apply one lesson.

# Complete the project records

*The organisation needs a reliable current history of what was delivered and decided.*

## Prepare the archive

Organise approved scope, plans, changes, acceptance, financial and supplier records, key decisions, technical handover and lessons under relevant access and retention rules.

## Stock-count case

The closure folder points to the accepted workflow version, three site records and the support handover. Obsolete drafts remain distinguishable from current evidence.

## Keep it findable

Assign an owner and location after the team disbands. The next maintainer should not depend on a former team member's private inbox.

**TAKE IT TO YOUR PROJECT**

*Ask a colleague to locate one critical record without your help.*

# A filled closure summary

*Use a concise note to support the authorisation decision.*

## Delivery and readiness

Stock-Count Pilot. All three stores now have accepted configuration, verified scenarios and completed training after the final rehearsal. Operations has accepted the support handover.

## Commercial and financial

Record the reconciled cost position, invoice status and any continuing supplier commitments with named owners. Link the relevant evidence and unresolved matters if any.

## Learning and benefits

Early representative testing becomes a rollout checklist control. The operating owner measures stock-count accuracy and effort at the agreed thirty-day review. Closure awaits the designated approval record.

**TAKE IT TO YOUR PROJECT**

*Replace every summary claim with linked evidence from your project.*

# Plan benefit reviews

*Useful results often need measurement after the project ends.*

## Agree the responsibility

Specify the intended benefit, baseline, measure, review period, data source and owner. Identify the action route if the expected result is not appearing.

## Stock-count case

Operations compares counting accuracy and effort after the pilot has been used. Changes in stock mix or staffing are relevant context when interpreting the result.

## Keep the boundary

Project closure can be appropriate before all later benefits are measured, provided the continuing responsibility and review are explicitly arranged.

### TAKE IT TO YOUR PROJECT

Assign one post-project benefit review with a measure and owner.

# Obtain closure and release resources

Use the actual governance to finish the temporary undertaking.

## Seek the decision

Present delivery, acceptance, transition, remaining obligations, finances, lessons and benefit-review arrangements to the authorised owner.

## Stock-count case

The sponsor reviews the closure evidence after all required readiness conditions are met and records the decision. Team and supplier resource changes follow the agreed arrangements.

## Communicate the result

Tell stakeholders what has closed, who owns the service, how issues are raised and which reviews remain. Avoid leaving an unofficial project team as the permanent support route.

TAKE IT TO YOUR PROJECT

Write the essential handover message for the service users.



## Learn from 350+ top universities and companies

ILLINOIS

Duke UNIVERSITY

Google

UNIVERSITY OF MICHIGAN

IBM

VANDERBILT UNIVERSITY

JOHNS HOPKINS UNIVERSITY

## Invest in your career

### Explore new skills

Access 10,000+ courses in AI, business, technology, and more.

# Your closure desk check

*Closure should leave the organisation able to operate and learn.*

## Check the result

Is authorised scope reconciled, acceptance evidenced and operating readiness confirmed? Are residual matters and continuing obligations owned?

## Check the record

Are financial and supplier positions clear, project records accessible, lessons actionable and later benefit reviews assigned?

## Use the pilot case

The project closes after the final readiness evidence, while operations owns support and the benefit review. Follow the evidence and authority in your own setting.

### TAKE IT TO YOUR PROJECT

Walk the closure criteria with the receiver before requesting final approval.