







## PROJECT MANAGEMENT TOOLKIT

# Project Closeout Checklist

Use this checklist to help you close out your project.

 <h3>1. Lessons Learned</h3> <p><input type="checkbox"/> <b>Identify and document lessons learned.</b></p> <ul style="list-style-type: none"> <li>• Conduct a thorough postmortem process.</li> <li>• Gather feedback from all stakeholders.</li> <li>• Highlight important issues that will help improve the quality, value, workflow, speed of completion, cost-efficiency, and team synergy of the next project.</li> <li>• Use this information in your Final Presentation.</li> </ul>	 <h3>2. Survey</h3> <p><input type="checkbox"/> <b>Assist the team with conducting a survey.</b></p> <ul style="list-style-type: none"> <li>• Determine if the project objectives were met.</li> <li>• Measure satisfaction.</li> <li>• Use the results in your Final Presentation.</li> </ul>
 <h3>3. Final Presentation</h3> <p><input type="checkbox"/> <b>Create a final report or presentation and use it to conduct a project closeout meeting.</b></p> <ul style="list-style-type: none"> <li>• Create a final report/presentation that you can present to your project sponsor and steering committee.</li> <li>• Generally you will include a Project Overview, Survey Results, Lessons Learned, and What's Left.</li> <li>• Present the final report prior to conducting your Celebration.</li> </ul>	 <h3>4. Celebration</h3> <p><input type="checkbox"/> <b>A celebration and camaraderie can help energize everyone for the next project.</b></p> <ul style="list-style-type: none"> <li>• Keep it short.</li> <li>• Make it fun.</li> <li>• Leverage pieces from your final report/presentation – not everyone remembers (or knew) all the details of the project, so don't forget to include the project recap.</li> <li>• Ask your project sponsor to share a few words</li> </ul>
 <h3>5. Archive</h3> <p><input type="checkbox"/> <b>Archive project documentation.</b></p> <ul style="list-style-type: none"> <li>• Archive relevant docs used in the project from start to finish. This includes project files, recorded meetings, and your Monday.com board.</li> <li>• When you sign off with your Project Sponsor, explain what was archived.</li> </ul>	<h3>6. Other Closeout Items</h3> <ul style="list-style-type: none"> <li>• Hand over project ownership, if necessary. Transfer management of the completed project to the new owner.</li> <li>• Settle payments, if necessary. Process outstanding invoices. Note down variances, cost efficiencies, and other financial information that will help you optimize the budget for the next project.</li> </ul>
 <h3>7. Sign Off with Project Sponsor</h3> <p><input type="checkbox"/> <b>Review the project scope, the deliverables, and all of the completed closeout items. Ensure 100% satisfaction.</b></p>	<p style="text-align: center;"><i>Hooray, you did it!</i></p>