

Jeff Oltmann on Mastering Projects
Carry Through to the Finish Line

Tips for the End of a Project

Project team members are often dog-tired by the time their projects near completion. Norm Kerth, an expert on software projects and retrospectives, laments, “I am usually worn out at the end of one of my alligator-infested swamp draining projects.”

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- Norm Kerth ¹

In their haste to be done with the project as quickly as possible, team members depart prematurely, or don't fully complete all of the project's work before moving on. This is very painful for the people who must receive the not quite ready deliverables.

Here are seven tips to help your projects transition smoothly to ongoing operations or follow-on projects.

Ensure a Smooth Transition

1 Manage unresolved tasks or issues. Resolve any issues left open on the project's issues list. Close as many as possible before the project ends. Transition the remaining open issues to an operational resource,

a different active project, or to someone who can design and test a fix. Make sure every issue has a point person, a due date, and accountability for closure.

2 Transfer knowledge. Deliberately plan how to transfer knowledge to the people who will be responsible for operating or improving what the project created. This builds up the organization's knowledge banks and reduces startup problems. Knowledge transfer includes completing documentation, archiving records, and holding formal knowledge transfer sessions.

For example, several engineering teams that I managed organized internal technology transfer conferences near the end of major computer development projects. These conferences delivered crucial knowledge that helped manufacturing, service, marketing and sales prepare to deliver a new product to eager customers.

3 Notify all project participants. A project should end, although at many companies they don't. Formally transfer control to on-going operations, such as the manufacturing line for a new product that the project completed, or to new projects, such as one to add more refinements to a second generation of the new product.

Measure Success

4 Assess customer satisfaction. Verify that customers, stakeholders, and sponsors are satisfied with the deliverables that the project created—whether product, service, or pro-

cess. If not, address their issues. That may include extending the project to fix the problems, agreeing to defer improvement work to a future project, or deciding not to fix the shortfalls (and resetting expectations appropriately). In many cases, it is prudent to get customer approval in writing.

5 Verify Attainment of Benefits. Did the project or program realize its intended benefits? A project is typically measured by how well it met expectations for the triple constraint - schedule, cost, and scope (including features and quality). However, determining how well a program realized its benefits is more difficult. Programs are directly responsible for delivering broad business benefits from multiple projects, such as earning a certain amount of profit or new market share. These benefits can be difficult to measure and often don't become evident until months or years after a program is finished. The program manager may need to arrange for a benefits realization review (perhaps performed by someone else) that will happen long after the program is closed.

Get Better

6 Learn by using a structured retrospective. A retrospective

gathers lessons learned from the people who worked directly on a project, then uses them to improve individual and team skills, tune processes, upgrade tools, and change organizational behavior. Investing in a good retrospective delivers three important benefits:

- Improves the capabilities of not just people who work on projects, but also the organization to which they belong
- Recharges people and repairs damaged working relationships
- Fulfills the human need for ritual and closure.

7 Celebrate accomplishments. The project team typically works long and hard on a project, through ups and downs. Maintain high morale and recharge the human beings - who are the engines of projects - by celebrating their work and accomplishments.

Endpoint

Don't wait until the end of a project to decide how to close it. Set expectations early in project planning. A small dose of foresight will yield a smoother transition and less pain at the end.

¹Kerth, N. L. (2001). *Project Retrospectives*. New York: Dorset House.

About the Author

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