Case Study: Phase 4

by Sophia

This tutorial will focus on Phase Four of the project life cycle, closing the project, through a case study on building an energy efficient house, specifically demonstrating:

1. Phase Four: Closing the Project

The case study used today is the development and construction of an energy efficient house for a couple.

Once all scheduled tasks are complete and the deliverable has been created, which in this case is the home for the couple, the managing phase is complete. Then it is time for the project manager to close the project.

1a. Project Readiness

The first step in the closing process is verifying that the project is ready to close. In this case, the project manager can facilitate the final inspections that must occur before a house is considered ready for occupancy. The project manager schedules these walkthroughs, and once the final inspection is given, the project closing process can continue.

1b. Contracts Closed

All contracts must be paid in full and marked closed during this process. Each subcontractor must be paid, and the amounts tallied in the actual budget numbers.

The budget for the energy efficient house finished within the homeowner's target value of 15% above an average house.

1c. Final Documentation

The project manager then completes the final documentation required by the project governance. For this project, a final status report is given to the architect and the homeowners, which details:

- Final schedule
- Budget numbers
- Any changes made to the house since the original plan

    ↗ EXAMPLE Recall that a tile floor was substituted for a wood floor, so this change is noted in the final report.

1d. Project Approval

The project must then be approved by the stakeholders. A meeting at the home is arranged for the project to be approved by the stakeholders - the architect and homeowners. They walk through each room of the house, discussing any changes.

During this time, the knowledge of the project and the operation of the home is explained in full to the homeowners.

> ↗ EXAMPLE This house is equipped with a system to monitor all energy usage. So the project manager arranges a demonstration of the various features of the system. The homeowners are pleased, the architect is satisfied, and the project is approved.

1e. Ownership Transfer

In other projects, this is the stage when the operation of the deliverable is transferred to the person handling the implementation or operation of the project. In this project, the keys are handed over to the homeowners, who can then move into their place.

1f. Information Warehousing

The project manager must make sure to warehouse any project information that will be helpful for future projects.

The project manager hopes to work on more energy efficient houses in the future. Any ideas and decisions related to the house's operation are electronically saved on the company's servers.

1g. Lessons Learned

Final meetings are arranged with each of the team leads and the architect to document the lessons learned on the project. Any information gained from the project that can be used to improve the quality of future projects or aid other project managers is documented.

> ↗ EXAMPLE The project manager learns from the insulation contractor about the various issues encountered with the roofing insulation for the high cathedral ceilings in the project. This is recorded so these issues can be avoided in the future.

1h. Individual and Team Evaluations

The project manager thanks the team leads and releases them from the project, providing each of the team leads with a performance evaluation. Both individual and team performances are evaluated. In the case of other projects, these performance evaluations might be used in annual performance reviews.

🗲 BRAINSTORM

Now that you've learned about all four project phases in a real-world context, take a few moments to reflect:

- You learned in an earlier lesson that certain setbacks could kill a project. During which phase should a project manager prepare for these setbacks?
- Think about a time when you had to rely on your communication skills. How did open communication help the project? How might a lack of communication hurt it?
- Aside from their use in performance evaluations, why are individual work and teamwork equally

important in a project's life cycle?

☆ **BIG IDEA**

In Phase 4: Closing a Project, the project manager will close the project:

- Project Readiness
- Contracts Closed
- Final Documentation
- Project Approval
- Ownership Transfer
- Information Warehousing
- Lessons Learned
- Individual and Team Evaluations

📋 **SUMMARY**

This tutorial demonstrated a **case study: phase four, closing the project** to give you a real-world sense of what this stage would look like in real life. Lessons learned are warehoused and individual performances are evaluated in this stage.

Source: this work is adapted from sophia author jeff carroll.