Project Approval

by Sophia

In this lesson, we'll discuss how a project manager organizes and facilitates the approval to close a project. Specifically, you will focus on:

1. Project Approval

When a project is ready to close, the project manager will set up the final approval meeting. Depending on the organization, this may also be handled through a more informal sign-off procedure.

Sign-off approval can occur when the project manager determines that the project is ready to close, meaning:

- All tasks in the schedule have been completed.
- All deliverables have been created and performed to the specifications, requirements, and quality standards outlined in the project scope.
- Final information and evaluation of the project have been prepared.
- Reports have been created comparing the schedule and budget to the plan baseline value.
- All contracts are closed out, including those with vendors, consultants, or materials agreements used by the project.
- All required documentation is completed as defined by the project governance.

2. Approval Meeting

Once these criteria have been met, the project manager can arrange the approval meeting if needed.

This meeting will include the project sponsor, any key stakeholders with sign-off authority, and any operation members taking over the project's deliverables. Sign-offs will be needed from each group.

The project manager should prepare the meeting agenda and distribute it to all attendees. During the meeting, the project manager will explain:

- How the deliverables and requirements have been satisfied
- Any variances in the final schedule or budget as compared to the plan baseline
- The plan for transferring ownership of deliverables to those who will manage, implement, or use them

3. Project Sign Off

If all goes according to plan, the meeting will conclude with a sign-off for the project.

Below is an example of a project approval. A formal project sign-off should include a signature from each stakeholder with sign-off authority.

Formal Acceptance Signoff Form
Project
Date:

Formal Acceptance
Stakeholder:
Project:

Acceptance of Project Deliverables and Approval of Project

The project deliverables have been reviewed against the prescribed acceptance criteria. Based on these criteria, the project product is accepted:

As complete: Subject to the attached conditions:

Approved by: Date:

| **Conditions of Acceptance** |
| :--- |
| |

🚩 **HINT**

> If approval is not received, then the project manager should organize any changes to the project or documentation necessary to receive approval and reschedule a new meeting.

Upon project approval, the project manager can close the project using the following steps:

- Complete the lessons learned document.
- Warehouse any records associated with the project.
- Transfer ownership of the project to those managing the operation of deliverables.
- Evaluate and release the team.

We'll cover these steps in more detail in other lessons.
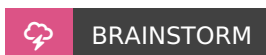
⚡ **BRAINSTORM**

> Think about a project you would like to complete. Imagine you are the manager for this project, and ask yourself the following questions:

- What steps would you take to determine if the project is ready for approval?
- If the project is not ready for approval, what would you need to do to first?
- If you hold an approval meeting, what topics will you need to address?

SUMMARY

In this lesson, you learned the criteria needed for **project approval**, and that the project manager needs to arrange the project approval meeting. You now understand how to obtain sign-off on the project.

Source: This work adapted from Sophia Author Jeff Carroll.