

Transferring Ownership

by Sophia



WHAT'S COVERED

In this lesson, we'll learn how to transfer ownership of a project into operations once it is complete. Specifically, you will focus on:

1. Transferring Ownership

Once a project is complete, a project manager will often not be involved in the operation of the project's deliverables so the project will need to transfer to those who will be responsible for implementation.

Transfer of ownership occurs when the project's deliverables are judged as ready to be during the readiness evaluation. This transfer process helps inform the individual responsible for implementing the deliverable about any details learned during the project development process that may assist them in their work.



TERM TO KNOW

Transfer of Ownership

The process of handing off formal control of project deliverables to an individual or group responsible for implementation.

1a. Individual Receiving the Transfer

It is best for a smooth transfer if, early in the project, the project manager knows the individual who will take over implementation of the deliverables. This person should be considered a key stakeholder, and the project manager should communicate with them throughout the project life cycle.

This communication gives the transfer individual considerable experience with and knowledge of the project. If possible, it also helps to transfer responsibility and accountability to a single individual. Even if a group or department takes over implementation, try to identify one person who will represent that group.

1b. Transfer Meeting

The project transfer should occur in a transfer meeting organized by the project manager, before which the project manager should compile the information and documentation necessary for the transfer.

It's the project manager's responsibility to investigate how much the individual implementing the project deliverables knows about the project, then provide the information needed to fill any knowledge gaps.

The project manager should review the project scope with the transfer individual during the meeting to make

sure all quality and performance details are understood. In addition, the expectations of the stakeholders should be communicated, since they will continue to determine the success of the project during the implementation of the deliverables.

If the transfer individual has been involved in the project, then the project manager won't need to review the history of the project, though the individual should still be informed of any key decisions or issues they didn't experience directly.

Finally, the project manager should describe the final status of deliverables and review any outstanding issues that still remain.

Formatted like a meeting checklist, the information would appear as below. This list should be customized based on the experience of the individual implementing the deliverables:

- Project Deliverables
- Project Requirements
- Project stakeholders that were included in the project
- Outstanding issues if any exist
- Outstanding performance or quality issues if any exist, and
- Contact information for team members who will support the product during implementation. Note that they should be team members who were involved in the creation of the deliverables.

1c. Follow Up After Transfer

After the transfer meeting is complete and the official handoff has occurred, the project manager should continue to check in with the individual responsible for implementation. It is not only a courtesy; this check-in might be essential for a successful implementation since the project manager has intimate knowledge of how the deliverables were produced.



By establishing periodic communication, either in person, email, or by other means, the project manager shows that they are attentive and proactive. If questions then arise about the deliverables, the implementation individual will feel comfortable consulting the project manager if needed.

In most cases, this contact can end after an appropriate time and a period of smooth implementation has passed.



Think about the process of developing a new car engine

The design of the engine would be managed as a project. Once the design of the engine was complete and verified, the project manager would transfer the actual implementation and manufacturing of the engine to an operations individual.

With this project in mind, create a checklist of topics that the project manager should cover during the transfer meeting.



In this lesson, you learned about the **transfer of project ownership**. You now understand how the project manager cooperates with the individual receiving the transfer, why a **transfer meeting** is needed, and what should be covered at this meeting. You also know why it's important for the project manager to **follow up** after the transferring project.

Source: This work adapted from Sophia Author Jeff Carroll.



TERMS TO KNOW

Transfer of Ownership

The process of handing off formal control of project deliverables to an individual or group responsible for implementation.