Project Management Webinar

The Art of Getting it Done

PROJECTinsight®

Project & Portfolio Management Software

Initiate Project Intelligence®

Things to Know...

- All participants will be on mute

- Questions are welcome

- Use the question box to ask questions

- PM training is valid for 1 PDU

- Must be in attendance for full session

- PDU certificate sent by the end of the day

- Recording and slides sent by tomorrow

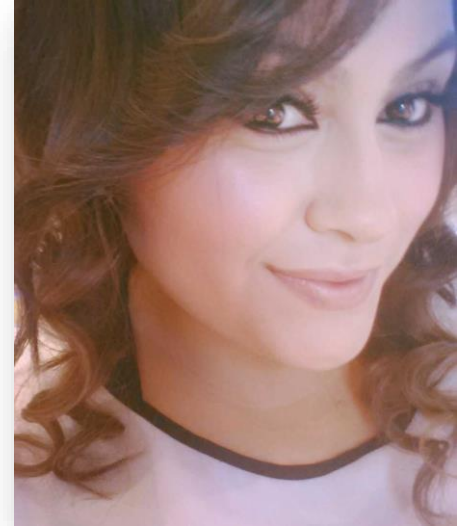**PROJECT**insight

Moderator

Denise Rodriguez

Project Insight

Marketing

Denise.Rodriguez@projectinsight.com

www.projectinsight.net

Project Insight

Schedule a customized demo today!

- +1 (949) 476-6499 x3

- info@projectinsight.net

- Request info: www.projectinsight.net

PROJECTinsight®

Presenter

Diane C. Buckley, MBA, PMP

CEO, Core Performance Concepts Inc.

Training in project management,

PMP® and CAPM® certification, leadership,

business analysis, agile and six sigma

dbuckley@cpconcepts.net

www.coreperformanceconcepts.com

PMP® and CAPM® are registered trademarks of the Project Management Institute

Poll: Getting Things Done

Where does your organization see the biggest problem in project delivery?

- Delivering within the budget
- Delivering all the deliverables
- Delivering according to the original schedule
- Delivering to the customer's satisfaction

Objectives of the Webinar

At the end of this webinar, you will be able to:

- Learn the reasons that ending a project is harder than starting a project

- Gain successful sign-off by customers on project completion

- Identify techniques for effectively closing projects

PROJECT insight

Why is it hard to close projects?

Fun to Start Projects

Distractions

Budgets

Small Items Appear Small

Icon Credit: Creative Commons

It's Fun to Start Projects!

Friends
Technology
Emails
Money
Health
Family
Work
Coworkers

Distractions

Budget

No more budget

Perception of larger activities are the most important thing.

Small items are small, right?

Question for you...
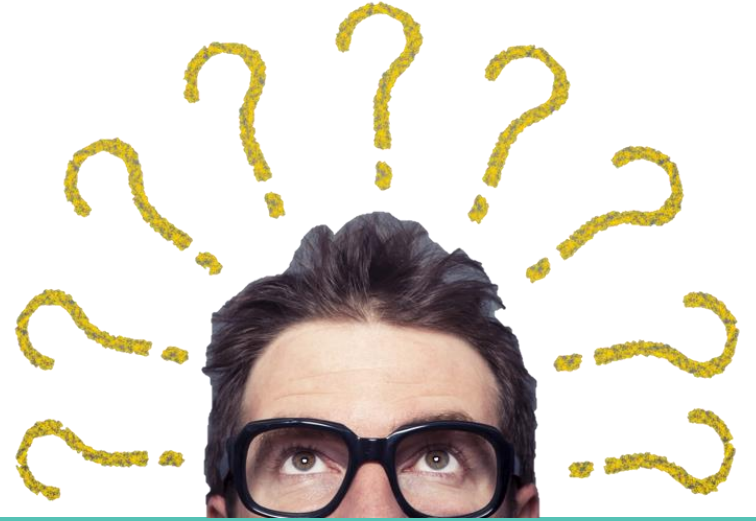
What challenges have you experienced in closing projects?

Please submit your ideas through the question box

Gain Successful Sign-off

- Customer happiness
- Extra energy needed

Build the Relationship

- Meet with client regularly to confirm what is remaining to complete to close project

- Build rapport and trust during the entire project

PROJECTinsight

Other Approaches

- Identify closure "risks" weeks before final sign-off

- Start lobbying for "focus" within need areas

  - Departments critical to "finish"

  - Customer input

- Gain agreement to prioritize final needs

  - Work with client to ensure final needs are not "wish" items

PROJECTinsight

Question for you...
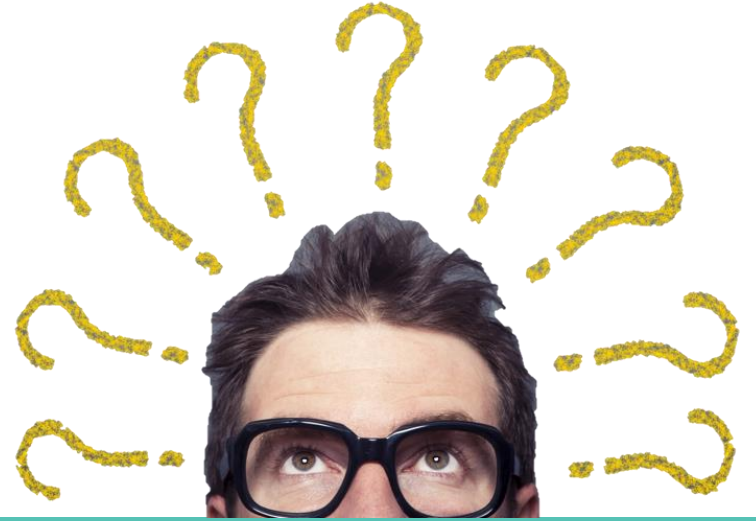
What other approaches do you use to facilitate sign-off in your organization?

Please submit your ideas through the question box

Techniques for Effectively Closing Projects

- Documentation, documentation, documentation
- Diligence on closing minor items

Project Acceptance Agreement

Project Name: New Branch	Project Manager: Mary Jane Smith
Project Sponsor: Scott Executive	Starting Date: 1/15/04
New Branch Manager: Jerry Swank	Grand Opening: October 5, 2004

Brief Description of Project: This project will select, build and open a new Banking Branch by September 30th, 2004.

Product Functionality
The goal of this project was to deliver a new banking branch. It includes the selection of a sight to the actual Grand Opening Event.

Project Schedule
The project team was able to deliver ALL functional requirements to the customer on or before the final delivery date of September 30, 2004. The Grand opening is scheduled for October 5th, as planned.

Project Support
At the completion of this project, ALL Customer Support will fall under SLA X99839.

Risk, Issues and Action Items
All risks associated with the delivery of the new Branch project have been addressed. There are no remaining risks outstanding.

Quality Assurance
All quality assurance tests requested by the customer and performed as part of the organization's standard practices have been completed. The results of the tests demonstrate that the Branch performs as expected and promised and is "fit-for-use" by the customer.

Financials
The project was performed within the constraint of 10 resources over the life of the project.

Performance Monitoring
Since this branch will be run & maintained by the organization, the SLA agreement covers the specific performance monitoring expectation agreement.

Project Documentation
The following documents are being archived in x:/Branch Projects/New directory.
1. Project Plan
2. WBS
3. MSProject Schedule
4. Meeting Minutes
5. Communications Plan – Internal & External
6. Change Control Log
7. Risk Log
8. Issues & Action Log

Business Justification
The Customer is the Mortgage Lending Business Unit and will be involved in verifying the achievement of the business objectives of this project. It is expected that the business unit will report back to the project team within 6 months after the completion of the project. This initial ROI stated that Branch will hold $1,000,000 in assets within the 1st 6 months of the project completion.

Signatures:

_____   _____   _____   _____
New Branch Manager   Date   Business Unit Sponsor   Date

Project Closure Document

Core Performance Concepts
http://www.coreperformanceconcepts.com/resources/

PROJECTinsight

Diligence on Closing Last Items

- Dedicate your time to staying on task with small remaining to dos.

- Negotiate resources(s) to be dedicated to wrap up any open items – Plan for it.

- Transition to operations training – the more comfortable your client is with the support team the easier it is to close the project even if there are a few open items.

PROJECTinsight

Question for you...
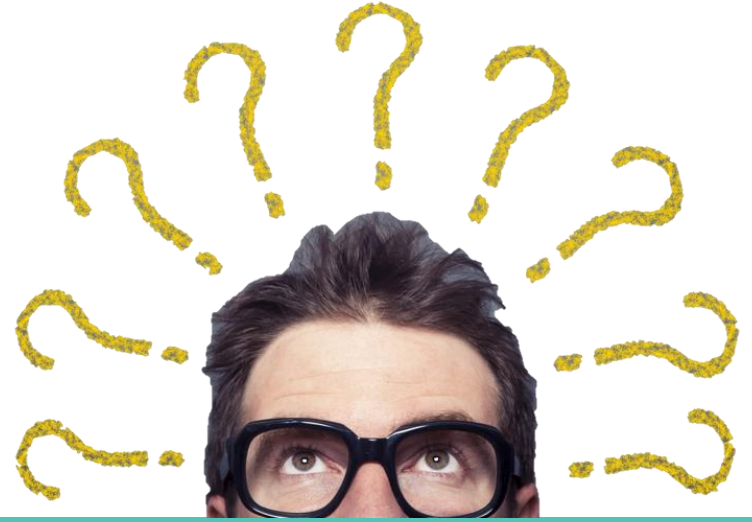
Any other ideas?

Please submit your ideas through the question box

Review

- Why is ending a project harder than starting a project?

- How can you gain successful sign-off by customers on project completion?

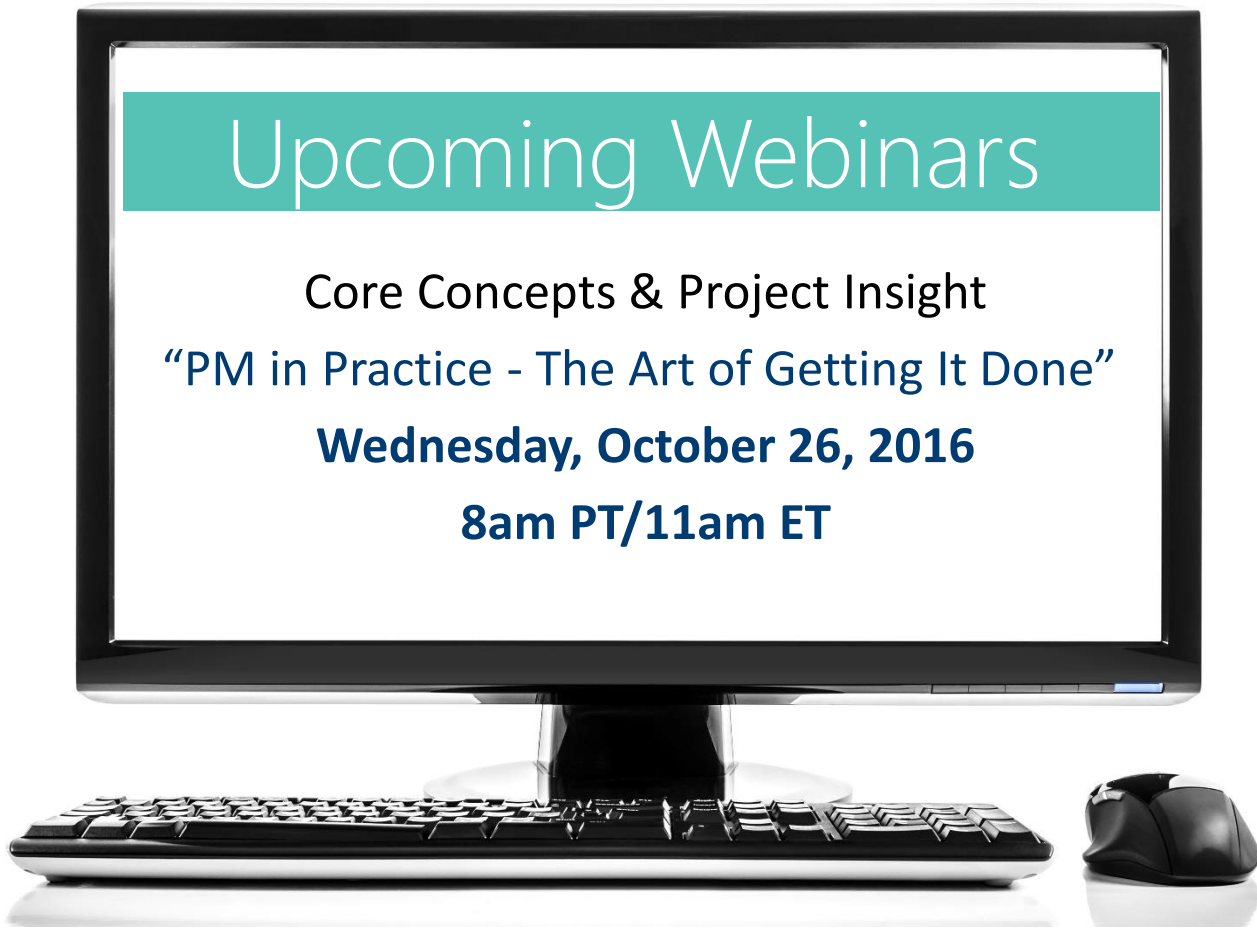- What are some techniques for effectively closing projects?

PROJECTinsight

Any Questions?

Upcoming Webinars

Core Concepts & Project Insight

"PM in Practice - The Art of Getting It Done"

Wednesday, October 26, 2016

8am PT/11am ET

Special Promotion

Continue Improving Your Project Management Skills

- ▶ 10% discount for online courses

- ▶ Check them out today!

http://clicky.me/cpc-pm

PROJECTinsight

tweet
message
share
like
business
join us
follow
information
software
comment
friends
news
blogs
social media
connect
leadership
videos
projects
tech
network
project management

Follow, like, subscribe!

Project Insight Community

- ▶ Sign up for more

- ▶ They are all FREE

- ▶ Check them out today!

| PM Training | Leadership | IT Methodology and Agile | Product Training |

PROJECTinsight

See you next time!