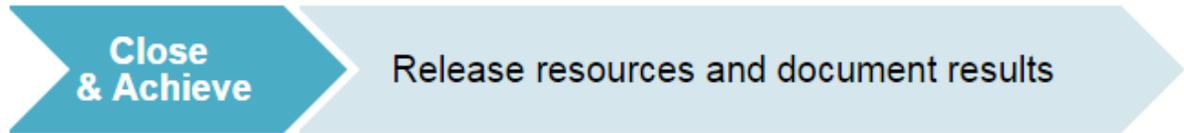




Phase 5: CLOSE and ACHIEVE



The CLOSE & ACHIEVE phase helps you bring the project to a successful end. This phase starts once the project's product is accepted and transferred to the support organization, or a decision is made to suspend or cancel the project.

During this phase:

- Closing activities confirm custody of the project's products, deliverables, and documentation, including lessons learned for future reference.
- The organizational change manager confirms that the people impacted by the change are demonstrating new behaviors and habits associated with the new processes.
- The sponsor and project manager release the resources committed to the project, address remaining open items, and wind down the project in a way that minimizes risk in this final process phase of the project.
- It provides the opportunity to assess the project and develop lessons learned and recommended practices to be applied to future projects.

The completion of CLOSE & ACHIEVE phase activities signifies the formal ending of all project work.

Key Participants: Sponsor, Project Manager, Organizational Change Manager, Steering Team. Stakeholder(s), and Process Owners.

Close and Achieve Resources

[Project Closeout Documentation Tool](#) 

[Phase 5 CLOSE and ACHIEVE General Guidance](#) 

CLOSE and ACHIEVE Steps:

1. Review the [Sponsor Checklist MONITOR and CONTROL, CLOSE and ACHIEVE](#).
2. Review the [Phase 5 CLOSE and ACHIEVE General Guidance](#) to ensure familiarity with the process.
3. Complete the documentation of [Lessons Learned](#).

This activity may also include contractor personnel, stakeholders, steering committee members, and other project participants. Lessons learned are the knowledge gained during a project and show how project events were addressed or should be addressed in the future for the purpose of improving future



performance. They are documented experiences that can be used to improve the future management of projects.

During the project, lessons learned may be documented as part of issue resolution. During the CLOSE and ACHIEVE phase, a broader audience should be contacted for lessons learned and these (as well as those related to project issues) should be documented in a manner consistent with the lessons learned guidance.

4. **Document potential future enhancements, or changes needed to bring expected future performance of the project.**
5. **Archive all documentation in a secure, long-term repository of data, documents, configuration or other information. Follow the [Project Closeout Documentation](#) tool to ensure no key steps are omitted.**

Archives are typically stored on secure, long-term media in accordance with applicable document and media retention policies and rules. The project repository may be retained in Workfront or agency project management software. This is performed by the project manager.

6. **Conduct CLOSE and ACHIEVE phase review.**

The sponsor and project manager submit the lessons learned and most recent KPI scorecard to agency governance for the final phase gate review. Assuming the project is still on target to achieve its objectives, the project can be formally moved to a “completed” status. At this point, the project manager should mark the project as complete.