

SOP Template: Engagement Closure and Post-Project Follow-up Steps

This SOP details the process of **engagement closure and post-project follow-up steps**, encompassing final project deliverable review, client sign-off procedures, team debriefing sessions, documentation handover, feedback collection, performance evaluation, and future improvement recommendations. The aim is to ensure a comprehensive closure of the engagement while maintaining client satisfaction and capturing lessons learned for continuous project management enhancement.

1. Final Deliverable Review

1. Confirm all deliverables meet project requirements and quality standards.
2. Conduct internal quality assurance and obtain approvals from project leads.
3. Document any deviations or outstanding issues with justifications and corrective actions.

2. Client Sign-Off Procedures

1. Schedule a formal project completion meeting with the client.
2. Present the finalized deliverables and review the project scope against outcomes.
3. Obtain formal sign-off from the client (written/email confirmation or completion certificate).
4. Archive client sign-off documentation for project records.

3. Team Debriefing Sessions

1. Conduct a closing meeting with the project team.
2. Discuss project achievements, challenges, and outcomes.
3. Capture lessons learned and improvement opportunities.
4. Document key discussion points and circulate minutes to stakeholders.

4. Documentation Handover

1. Prepare all project documentation for transfer (reports, plans, manuals, code, etc.).
2. Ensure completeness, accuracy, and accessibility of materials.
3. Formally hand over documentation to client or relevant parties.
4. Retain necessary records as per company policy and confidentiality agreements.

5. Feedback Collection

1. Distribute feedback surveys or conduct interviews with the client to assess satisfaction.
2. Collect feedback from internal project team members.
3. Compile feedback for analysis and reporting.

6. Performance Evaluation

1. Evaluate project performance against initial objectives, KPIs, and timelines.
2. Identify areas of success and areas needing improvement.
3. Review team member contributions for recognition or development.

7. Recommendations for Future Improvement

1. Summarize key lessons learned.
2. Develop actionable recommendations for future projects.
3. Update organizational knowledge bases, SOPs, or best practice guides as needed.

Roles & Responsibilities

Role	Responsibility
Project Manager	Oversees closure procedures, conducts deliverable review, facilitates debriefings, and coordinates documentation handover.
Team Leads	Support in reviewing deliverables, team debrief, and providing feedback.
Client Representative	Reviews final outputs, provides feedback, and issues project sign-off.
Quality Assurance	Validates deliverables for completeness and compliance.

Documentation & Records

- Project Closure Checklist
- Formal Sign-off Documentation
- Lessons Learned Register
- Feedback Forms/Reports
- Final Project Report

Review & Update

This SOP should be reviewed annually and updated as necessary to reflect current best practices and organizational needs.