

SOP: Project Closure, Final Reporting, and Post-Engagement Follow-Up

This SOP details the **project closure, final reporting, and post-engagement follow-up** process, including the formal completion of project activities, comprehensive documentation of results and lessons learned, final client deliverables, stakeholder communication, and evaluation of project outcomes. It ensures a structured wrap-up, accountability, and continuity through feedback collection and follow-up actions to support ongoing client relationships and organizational improvement.

1. Purpose

To standardize the process of closing projects, documenting outcomes, reporting to stakeholders, and conducting follow-up for continuous improvement and client satisfaction.

2. Scope

This SOP applies to all project managers, project team members, and client engagement leads involved in the completion of client or internal projects.

3. Responsibilities

Role	Responsibilities
Project Manager	Leads closure, reporting, and follow-up activities; ensures documentation and stakeholder communication.
Project Team	Completes final deliverables and provides input for lessons learned and process evaluation.
Stakeholders/Clients	Review deliverables and provide feedback on outcomes and engagement.
Quality/PMO	Reviews project closure documentation and ensures compliance with SOP.

4. Procedure

- Formal Completion of Project Activities**
 - Confirm all project deliverables have been completed and accepted by the client.
 - Conduct a review meeting with the project team to verify completion against the project plan.
 - Update all project tracking tools and records to reflect final status.
- Final Reporting**
 - Prepare a comprehensive final report, including:
 - Project objectives and scope
 - Summary of deliverables and results
 - Outcomes vs. original goals
 - Budget and timeline performance
 - Key risks/issues and how they were addressed
 - Document lessons learned and best practices.
 - Obtain approvals for the final report as per governance requirements.
- Final Client Deliverables**
 - Package and deliver all final outputs, documentation, and supporting materials to the client.
 - Provide user guides, training materials, or transition documents as appropriate.
 - Obtain written client acknowledgement/acceptance of deliverables.
- Stakeholder Communication**
 - Notify all stakeholders of project closure and key outcomes via email or meeting.
 - Share the final report and lessons learned summary with stakeholders.
 - Archive all formal communications as per data retention policy.
- Evaluation of Project Outcomes**
 - Facilitate a post-project review (retrospective) with the team and stakeholders.
 - Evaluate project performance across success metrics and KPIs.
 - Discuss what went well, areas for improvement, and action items for future projects.
- Feedback Collection**
 - Distribute client satisfaction and team feedback surveys.
 - Collect, analyze, and summarize feedback for organizational learning.
- Post-Engagement Follow-Up**

- Schedule a follow-up meeting or check-in with the client (e.g., 1-3 months post-closure).
 - Address any outstanding issues or support requests.
 - Identify opportunities for further collaboration or service enhancement.
8. **Archiving and Knowledge Management**
- Archive project documents, reports, and communications in the central repository.
 - Update organizational knowledge base with major lessons learned and reusable assets.

5. Documentation & Records

- Final Project Report
- Lessons Learned Register
- Client Acceptance Sign-off
- Feedback Survey Results
- Project Archival Checklist

6. Related Documents

- Project Management Plan
- Change Management SOP
- Data Retention Policy
- Client Communication Guidelines

7. Revision History

Version	Date	Description	Author
1.0	2024-06-14	Initial version	Your Name