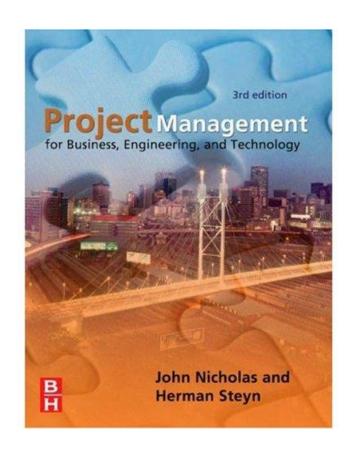
Chapter 12

Project Evaluation, Communication, Implementation, and Closeout

Project Management for Business, Engineering, and Technology

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Project Life Span: Execution

Phase A: Conception phase
Initiation stage
Feasibility stage
Proposal preparation

Phase B: Definition phase
Project definition
System definition
User and system
requirements

Phase D: Operation phase System maintenance and evaluation

System Improvement

System termination

(To Phase A:

Repeat cycle)

Phase C: Execution phase

Design stage

Product/build stage

Fabrication

Testing

Implementation stage

Training

Acceptance tests

Installation

Termination

Project Evaluation

Formative Evaluation

- Evaluation throughout the life cycle
- Purpose: to guide the project
- Asks: "What is happening?" and "How is the project proceeding?"

Project Evaluation

Summary Evaluation

- Evaluation after the project is completed
- Purpose: appraise project and assess enditem or outcomes
- Asks: "What happened?" and "What were the results?"

Communication Plan

- Addresses all project communication—formal and informal, verbal and written
- Includes tentative schedule for formal design and management reviews, milestone meetings, etc.
 - describes meeting formats, itineraries, preparations, attendance, and leader.
- Points of contact: customer, contractor, vendors, subcontractors, supporters, others.
 - Kind of communication needed for each (next slide)

Project Communication Plan

The Communication Plan is a matrix that details the type of project communications, who receives, and how often.

- 1) Identify parties and roles who require project communication.
- 2) In the 1st column, list parties by role, by group name, or name.
- 3) Identify types of communication needed.
- 4) List communication types across the top row.
- 5) Complete the grid by placing an "X" in the intersecting rows and columns.
- 6) Replace the role description with a person's name. In the (freq) section, indicate how often the communications take place.

The parties and types of communication listed here are for example only. Project Managers should create a communication plan specific to each project.

Project Information							
Project Name		Initial Release Date					
Project Number		Last Revised Date					
Project Manager							
Client							
Author							

Meeting/ freport	Status meeting (frequency)	Status meeting minutes (frequency)	Business feasibility	Information request	Technical feasibility	Business brief	Project plan (frequency)	Problems and issues (frequency)	Business study	Use case analysis	System architecture	Detailed technical design	Other
Client	Х	X	Х			Х	Х	Х	Х	Х			
Relationship manager		×	Х	х	х	Х	х	Х	Х	Х	Х		
Business analyst	Х	×	Х			Х	×	х	Х	Х	Х		
Project manager	Х	×	Х	Х	Х	Х	×	x	Х	Х	Х		Х
Client project team	х	×	Х			х	×	×	Х	Х			
IT project team	Х	X					х	х	Х	Х	Х		Х
Client director		×	X			X		х	X				Х
IT director		X	Х	Х	Х	Х	Х	X	Х	X	X		
Project sponsor		×	X			X			X				
IT VP		X	Х						Х				
Architect	Х	×	X	X	X	x	X	х	X	X	X		Х
Security/audit	X	×	X		×			x	X	X	x		
Internet operations	Х	×	Х		Х		×	×	Х	Х	Х		X
Int r anet operations	Х	×	X		×		×	×	Х				
Legal/corporations communication		×	Х		х			х	×				
Other													

Figure 12-1 Sample communication plan.

Purpose

communicate and assess project evaluative information

identify and quickly correct deviations from project plan

Informal Reviews ("Peer Reviews")

- Held frequently and regularly
- Involve members of the project team
- Focus on project status, special problems, emerging issues, and project performance
- Participation depends on project phase and issues at hand

Daily Standup Meeting

- Held at the start of each day
- Short (15 minutes) and to-the-point
- An update on status
 - team members give a quick run-though of yesterday's progress and today's next steps

Formal Reviews

Scheduled at milestones or critical project stages; e.g.,

- Preliminary review
 - Assess how well the functional design specifications fit the basic operational requirements
- Critical review
 - Check design for conformance to the preliminary design specifications
- In phased project planning approach, decision to continue project based upon results of the review
- Project audit
 - Review initiated by customer to assess project progress

Action Plan

- Created for each identified problem
- Might include (see next slide)
 - statement of the problem
 - objectives in resolving it
 - the required course of action
 - target date
 - person responsible
- Each meeting starts with a status review of items on the action plan.

Sample Action Plan

Problem area	Objective	Actions	Who	When completed	
1. Planning and scheduling	Establish backup support for each system.	(A) Discuss systems with analysts who support them; formulate plan for each system.	Project leaders and analysts	January 1	
	2. Review all systems. Eliminate those not	(A) Prepare questionnaire on system status.	Ron Gilmore	November 15	
	used; clean up others.	(B) Complete questionnaires.	Analysts and programmers	December 1	
		(C) Determine status and specific actions.	PL, analysts and programmers	January 31	
	3. Provide information on purposes and uses of new project management system.	3. Prepare seminar on PMS and present to staff.	Joan Gibb	Before March 1	

Project Life Cycle: Implementation Stage

Phase A: Conception phase
Initiation stage
Feasibility stage
Proposal preparation

Phase B: Definition phase
Project definition
System definition
User and system
requirements

Phase D: Operation phase
System maintenance
and evaluation

System Improvement

System termination

(To Phase A: Repeat cycle)

Phase C: Execution phase

Design stage

Product/build stage

Fabrication

Testing

Implementation stage

Training

Acceptance tests

Installation

Termination

Implementation Stage

- User acceptance
 - User training
 - User acceptance tests
 - Modifications
 - Final user tests
- System installation and conversion process
 - Parallel, pilot, cold turkey
- User approval/punch list

Installation/ Conversion Strategies

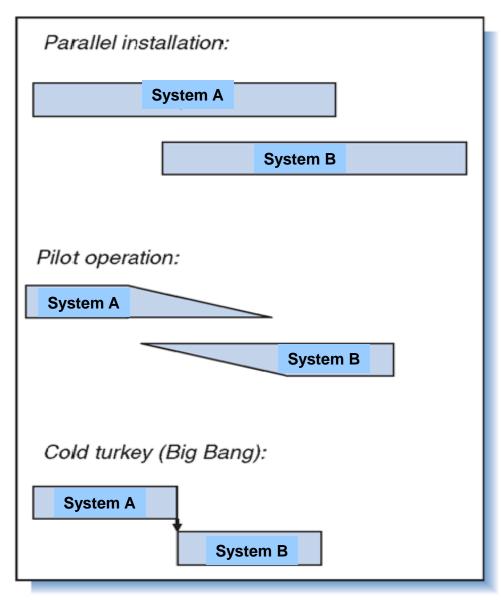


Figure 12-4
Three strategies for system conversion.

Project Life Cycle: Termination and Closeout

Phase A: Conception phase
Initiation stage
Feasibility stage
Proposal preparation

Phase B: Definition phase
Project definition
System definition
User and system
requirements

Phase D: Operation phase System maintenance and evaluation

System Improvement

System termination

(To Phase A:

Repeat cycle)

Phase C: Execution phase
Design stage
Product/build stage
Fabrication
Testing
Implementation stage
Training
Acceptance tests
Installation

Termination/ closeout

Termination and Close-out

- Termination
 - Planning of close-out
 - Final close-out
 - Post-completion project summary review/postmortem

Termination and Close-out Responsibilities

Planning, scheduling, and monitoring completion activities:

- Prepare and coordinate termination plans and schedules
- Plan to reassign project team personnel, and transfer resources
- Monitor termination activities and completion of all contractual agreements
- Monitor disposition of surplus materials and special project equipment

Termination and Close-out Responsibilities

Final close-out activities:

- Close out all work orders
- Approve completion of all subcontracted work
- Notify all departments and stakeholders of project completion
- Close project office, project facilities, and project books

Construction Punch List

				Completed		Date:			
Note/Ref.	CEILING	Note/Ref.	FLOOR/BASE						
	 Replace damaged ceiling tile 		32. Install missing base						I
	Properly seat ceiling tile/lens		33. Correct loose base at wall						I
	Level ceiling grid/eliminate bowing		34. Tighten joint at vinyl base						T
	4. Clean or correct finish on diffuser		35. Clean base: paint/scuffs/dust/debris						T
	5. Correct installation of blank-off at diffusers	.,	36. Correct gap at floor/wall transition						T
	6. Correct gap at sprinkler head/cap								T
	7. Install sprinkler cap	******	38. Clean/wax VCT to Manufacturer's specs						T
***************************************	8. Remove paint from ceiling/partition joints		39. Remove stain/spot from carpet						T
	9. Create tight joint at wall/ceilng transition	***************************************	40. Remove loose strings from carpet						+
	10. Clean light fixtures of dust/fingerprints		41. Install floor transition strip			-			+
	11. Install missing:	****	42. Correct seam:						+
	11. mstair missing.	-	42. Correct seam.				++++		+
							-		+
									+
		***************************************							+
	MALLO		MULIMORY					-	+
Note/Ref.	WALLS	Note/Ref.	MILLWORK				-		+
	12. Repair/repaint wall surface		43. Remove debris/dust from cabinetry			-			+
	Final paint coat not covering	W	44. Clean millwork/laminate finishes					-	+
	14. Repair tape joints		45. Align/adjust cabinet doors						1
	15. Repair wallcovering/correct seam		46. Adjust hinges/catches						1
	16. Remove paint at hardware/reveal/outlet		47. Install missing hardware:						1
	17. Install missing coverplate/electrical device		48. Install grommets/wire management to spec						-
	Fix gap at coverplate/thermostat		49. Fill laminate joints/caulk laminate to walls						1
	19. Align outlet/switch with floor/door		50. Install scribes at:						L
	20. Correct door/frame finish:		51. Remove extraneous paint from finish						
	21. Install brushes/silencers at frame		52. Adjust door undercut: higher/lower						
	22. Correct mullion finish:		53. Correct door veneer/finish						
	23. Clean debris/paint from mullions								Ī
	24. Clean dirt from walls/blinds	***************************************	Management (1997)						

		***************************************		Numbers re	fer to pun	ch list it	ems/lo	catio	ñ
				!					
				Notes	[Details			1
Note/Ref.	HARDWARE	Note/Ref.	MISCELLANEOUS						
	25. Latch does not catch		54. Clean glass/mirrors						
	26. Install door stops/silencers		55. Clean plumbing fixtures/apppliances						
	27. Install correct hardware (to specifications)		A						
	28. Clean hardware/remove paint splatters	****							
	29. Continuous keep not installed at strike							_	
	30. Adjust closer:	***************************************					. 1		
	31. Adjust door:	-					1		
	on Adjust door	***************************************		ROOM NU	JMBER:				

Performed by:

Date:

Closing the Contract

- Attention to side-items vs. end-items
 - Manuals
 - Tools/peripherals
 - User training
 - E.g., simulators









Negotiated adjustments to final contract

Project Summary Evaluation

Post-completion Project Review (Postmortem): Reviews:

- Initial project performance, cost, and schedule objectives
- Soundness of objectives in view of initial problem or needs
- "Needs" that the end-item was supposed to fulfill



Project Summary Evaluation

Post-completion Project Review

Reviews (cont'd):

- Evolution of objectives; reasons for changes
- Project performance with respect to final objectives



- Effectiveness of project management; relationships among managers, project team members, subcontractors and suppliers, and customer
- Termination process: customer reactions and satisfaction

Project Summary Evaluation

Post-installation System Review

- Evaluates the fully operational end-item system
- Focuses on the end-item system
- Provides operation and maintenance information for the system's designers
- Addresses
 - Is the end-item doing what it was intended to do?
 - Is the user getting the expected benefits
 - What changes to the system would fulfill the user's needs?

Project Life Cycle: Operation Phase

Phase A: Conception phase Phase B: Definition phase Initiation stage Project definition Feasibility stage System definition Proposal preparation User and system requirements **Phase D: Operation phase** Phase C: Execution phase **System maintenance** Design stage Produce/build stage and evaluation **Fabrication** Testing System System Implementation stage improvement termination **Training** Acceptance tests (To Phase A: System Installation Repeat cycle) replacement **Termination**

Phase D: Operation

 Project ends with completion of Phase C, project manager goes on to another project and core team disbands

 Sometimes, SDO remains involved with customer and end-item in some principal aspect of operation

Phase D: Operation

- System review Maintenance
 - Repair/preventative
 - Standard, periodic
 - Post-installation

Enhancement