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

**Phase D: Operation phase**
- System maintenance and evaluation
- System improvement
- Termination

*(To Phase A: Repeat cycle)*
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 end-item 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)
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.

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### Project Information

<table>
<thead>
<tr>
<th>Project Name</th>
<th>Initial Release Date</th>
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<table>
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<tr>
<th>Project Number</th>
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<table>
<thead>
<tr>
<th>Project Manager</th>
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<table>
<thead>
<tr>
<th>Client</th>
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<table>
<thead>
<tr>
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<tr>
<td>Role/type</td>
</tr>
<tr>
<td>-----------------------------------</td>
</tr>
<tr>
<td>Client</td>
</tr>
<tr>
<td>Relationship manager</td>
</tr>
<tr>
<td>Business analyst</td>
</tr>
<tr>
<td>Project manager</td>
</tr>
<tr>
<td>Client project team</td>
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<tr>
<td>IT project team</td>
</tr>
<tr>
<td>Client director</td>
</tr>
<tr>
<td>IT director</td>
</tr>
<tr>
<td>Project sponsor</td>
</tr>
<tr>
<td>IT VP</td>
</tr>
<tr>
<td>Architect</td>
</tr>
<tr>
<td>Security/audit</td>
</tr>
<tr>
<td>Internet operations</td>
</tr>
<tr>
<td>Intranet operations</td>
</tr>
<tr>
<td>Legal/corporations communication</td>
</tr>
<tr>
<td>Other</td>
</tr>
</tbody>
</table>

**Figure 12-1**
Sample communication plan.
Project Review Meetings

Purpose

- communicate and assess project evaluative information
- identify and quickly correct deviations from project plan
Project Review Meetings

**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
Project Review Meetings

**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-through of yesterday’s progress and today’s next steps
Project Review Meetings

**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
Project Review Meetings

**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

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

*Figure 12-2*
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 C: Execution phase
   Design stage
   Product/build stage
   Fabrication
   Testing
   Implementation stage
   Training
   Acceptance tests
   Installation
   Termination

Phase D: Operation phase
   System maintenance and evaluation
   System Improvement
(To Phase A: Repeat cycle)
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

Parallel installation:
- System A
- System B

Pilot operation:
- System A
- System B

Cold turkey (Big Bang):
- System A
- System B

Figure 12-4
Three strategies for system conversion.
Project Life Cycle: Termination and Closeout

Phase A: Conception phase
- Initiation stage
- Feasibility stage
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- Design stage
- Product/build stage
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  - Implementation stage
  - Training
  - Acceptance tests
  - Installation

Phase D: Operation phase
- System maintenance and evaluation
- System Improvement
- System termination

(To Phase A: Repeat cycle)

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

### Ceiling
1. Replace damaged ceiling tile
2. Properly seat ceiling tile/lens
3. Level ceiling grid/eliminate bowing
4. Clean or correct finish on diffuser
5. Correct installation of blank-off at diffusers
6. Correct gap at sprinkler head/cap
7. Install sprinkler cap
8. Remove paint from ceiling/partition joints
9. Create tight joint at wall/ceiling transition
10. Clean light fixtures of dust/fingerprints
11. Install missing:

### Walls
12. Repair/repaint wall surface
13. Final paint coat not covering
14. Repair tape joints
15. Repair wallcovering/correct seam
16. Remove paint at hardware/reveal/outlet
17. Install missing coverplate/thermostat
18. Fix gap at coverplate/thermostat
19. Align outlet/switch with floor/door
20. Correct door/frame finish:
21. Install brushes/silencers at frame
22. Correct mullion finish:
23. Clean debris/paint from mullions
24. Clean dirt from walls/blinds

### Floor/Base
32. Install missing base
33. Correct loose base at wall
34. Tighten joint at vinyl base
35. Clean base: paint/scuffs/dust/debris
36. Correct gap at floor/wall transition
37. Caulk gap at wood base/drywall; refinish
38. Clean/wax VCT to Manufacturer's specs
39. Remove stain/spot from carpet
40. Remove loose strings from carpet
41. Install floor transition strip
42. Correct seam:

### Millwork
43. Remove debris/dust from cabinetry
44. Clean millwork/laminate finishes
45. Align/adjust cabinet doors
46. Adjust hinges/catches
47. Install missing hardware:
48. Install grommets/wire management to spec
49. Fill laminate joints/caulk laminate to walls
50. Install scribes at:
51. Remove extraneous paint from finish
52. Adjust door undercut: higher/lower
53. Correct door veneer/finish

### Hardware
54. Clean glass/mirrors
55. Clean plumbing fixtures/applications

### Miscellaneous

| Numbers refer to punch list item/location |

| Notes | Details |

| Room Number: | |

<table>
<thead>
<tr>
<th>Note/Ref.</th>
<th></th>
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<tbody>
<tr>
<td>HARDWARE</td>
<td>25. Latch does not catch</td>
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<tr>
<td></td>
<td>26. Install door stops/silencers</td>
</tr>
<tr>
<td></td>
<td>27. Install correct hardware (to specifications)</td>
</tr>
<tr>
<td></td>
<td>28. Clean hardware/remove paint splatters</td>
</tr>
<tr>
<td></td>
<td>29. Continuous keep not installed at strike</td>
</tr>
<tr>
<td></td>
<td>30. Adjust closer:</td>
</tr>
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<td></td>
<td>31. Adjust door:</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Note/Ref.</th>
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<tbody>
<tr>
<td>MISCELLANEOUS</td>
<td>54. Clean glass/mirrors</td>
</tr>
<tr>
<td></td>
<td>55. Clean plumbing fixtures/applications</td>
</tr>
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</table>
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

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  - System improvement
  - System termination

(To Phase A: Repeat cycle)
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