

## SIGN – OFF: PHASE 5

[intro talk show theme music, with studio applause]

GEORGE:

As many of you who've watched the show over the years will know, I've interviewed some of the most famous and influential personalities of our time. I've interviewed rock stars from Bono to Bieber, movie stars from Jennifer Lawrence to Bradley Cooper, and esteemed television judges from Simon Cowell to Judge Judy, but never have I been as excited as I am now to interview our next guest.

She's the author of the bestselling book titled SPECS: The CSC Way to Successful Project Management. She's been touring the book over the past few months and is here today to talk to us, specifically about the final chapter that covers project sign-off.

Ladies and gentlemen, Dr. Paula Morton.

[applause and some waves and smiles at the 'audience' from Paula]

GEORGE:

Thanks for being here.

PAULA:

Thanks for having me.

[applause softens then stops altogether]

GEORGE:

All right, let's dive in. You're writing a book on project management and you get to the last chapter on project sign-off. What is it you're hoping your readers will take away from this chapter?

PAULA:

Whether they're new to project management or have been doing it for years, PMs, or project managers, often skip the sign-off phase. And this happens because PMs don't always understand when a project is officially considered closed.

GEORGE:

And so what needs to happen for a project to be closed?

PAULA:

I want to talk about that in just a second. But the other thing I want people to take away from this chapter is the importance of Lessons Learned exercises.

GEORGE:

Perfect. So let's go back to project closure.

PAULA:

Right. So, many people think that if your client is happy after receiving the final work, the project is closed. Big no-no.

GEORGE:

Hm, let's say I sent off the final videos for a project and my client emails me and says that the videos are perfect and she can't wait to share them with her employees.

PAULA:

Job well done, but no, your project is *not* closed yet. You still need to send your company's sign-off form and have your client sign it and send it back to you.

GEORGE:

And what if my company doesn't have an official sign-off form?

PAULA:

Then you have to create one. It doesn't have to be perfect—I mean, ya don't need a lawyer drafting it up for you or anything—but it should clearly state that by signing this form, your client agrees that your company completed all work to her satisfaction and it meets the requirements as per the contract.

GEORGE:

All right. So, now my client sends back the signed form.

PAULA:

Good. Now you need to collect any invoices from contractors, freelancers, and the client to close the contracts, and then file them as necessary.

GEORGE:

Let's go to the phones. We've got Shaan from Northern Ontario with a question. Shaan?

SHAAN (V.O.)

Hello?

GEORGE:

Hey Shaan, you're on the air.

SHAAN (V.O.)

Hi George. Hi Paula! You can hear me OK?

GEORGE:

You're coming in clear as mud, Shaan. Do you have a question for Paula?

SHAAN (V.O.)

Paula, I just want to say... LOVE your book. It's a must-have for all project managers out there. I bought two copies in case I lose one.

PAULA:

(laughs, is flattered) Thanks Shaan.

SHAAN (V.O.)

My question is about the Lessons Learned exercise. I know you've touched on it in the last chapter, but I wanted to ask if you recommend meeting with the client face-to-face for this exercise, or if you think a phone session is good enough?

PAULA:

Great question! For lessons learned, I'd make a push to meet the client in person, as long as it makes sense travel-wise. And try to involve everyone who worked on the project.

SHAAN:

Are you including everyone from the client team, too, because it could be tough to get everyone on their side in for that?

PAULA:

Absolutely, so just make sure they get the invitation and hopefully as many as possible show up. It might also be helpful to get someone on your team who wasn't involved in the project to come along to analyze the feedback objectively.

GEORGE:

And so what kinds of things are you looking for in the Lessons Learned exercise?

PAULA:

What did we learn from this project? What went well, what didn't? What would we change if we could and why? And answers to these questions will help your team if you take on similar projects down the road. You can save the next team time and expenses by having them read about this project, and avoid similar issues.

SHAAN (V.O.)

And that team will be able to see what was successful and adopt the same strategies.

PAULA:

Exactly!

GEORGE:

So, now you've completed your Lessons Learned exercise. Is the project considered closed?

PAULA:

Yes! After all the financials are completed, the client officially signs-off on the deliverables, and you complete the Lessons Learned exercise, you can close it down.

GEORGE:

All right, thanks Shaan for calling in and thanks to you [directed at Paula] for being so generous with your time.

PAULA:

Thanks George.

GEORGE:

If you haven't gotten your copy of Dr. Paula Morton's SPECS: The CSC Way to Successful Project Management, get out to the nearest bookstore and buy it. [directed to the audience] And for being in the audience today, each of you will get a free copy of the book. [resounding applause]

I'm your host George Bright. Have a good night everybody!