Project Clo-sure

Service Description Project Closure

imc Learning Suite | Consulting Department | July 08, 2025

Content

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1 Preface

The main target group of this service description are imc customers and their dedicated imc Project Managers / Business Consultants.
The purpose of this document is to provide a detailed description of the closing phase of a LMS implementation rollout project for imc customers and their dedicated Project Manager/ Business Consultant (imc project team). This will help to ensure that the closing phase of the project proceeds as smoothly as possible by providing a common understanding of how and what desired results are to be achieved within the closing phase of the implementation project.

2   Context

The LMS implementation project proceeds through a series of six sequential phases from in-ception to completion as well as one continual phase. This seven-phase methodology is the **imc LearnWay**, depicted below is its application in the "Project Life Cycle".

Project Life Cycle

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Project-, Stakeholder-, Change- Management

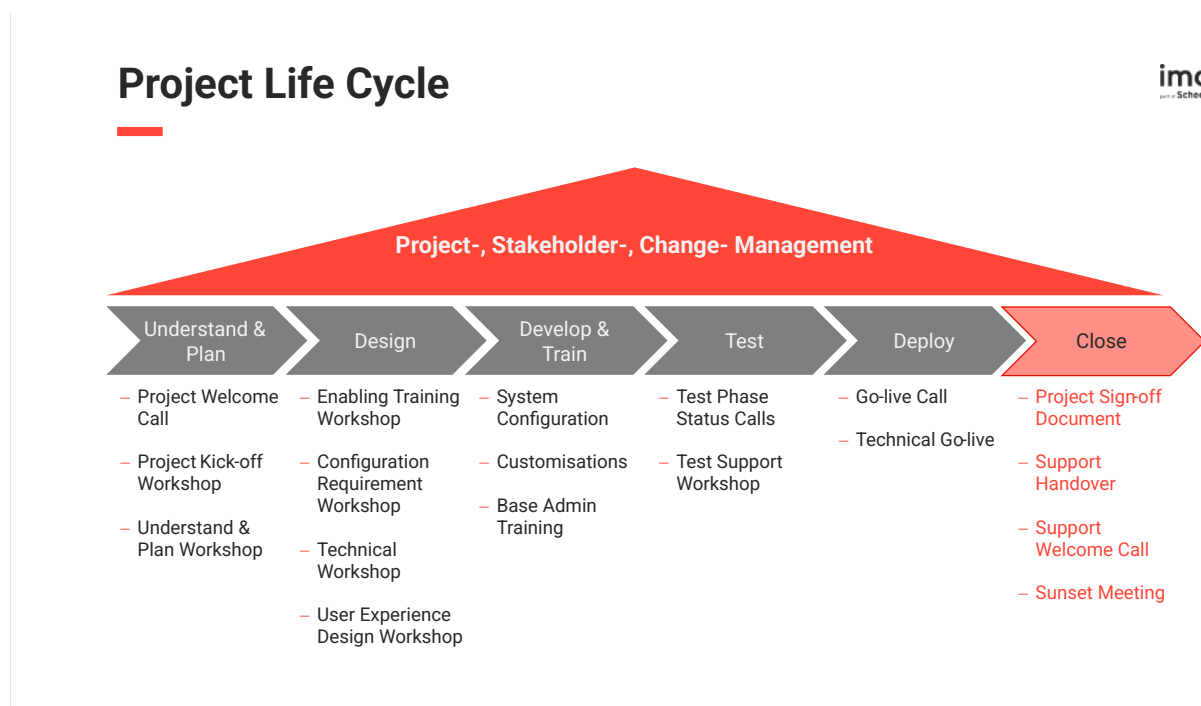| Understand & Plan	Design	Develop & Train	Test	Deploy	Close
– Project Welcome Call	– Enabling Training Workshop	– System Configuration	– Test Phase Status Calls	– Go-live Call	– Project Sign-off Document
– Project Kick-off Workshop	– Configuration Requirement Workshop	– Customisations	– Test Support Workshop	– Technical Go-live	– Support Handover
– Understand & Plan Workshop	– Technical Workshop	– Base Admin Training			– Support Welcome Call
	– User Experience Design Workshop				– Sunset Meeting

Figure 1 Project Life Cycle

Although the diagram shows a highly sequential process and procedure, it may be necessary to deviate slightly from this for individual projects, as some phases may partially overlap. It is up to the Project Manager/ Business Consultant to recognize and announce the necessity of these overlaps.

As per definition of a project, each project has a defined beginning and a defined end. This doc-ument focuses on the end of the project or more precisely the "**Close phase**" by creating a fun-damental understanding of what steps is needed and tasks must be accomplished to success-fully close a project.

3   Process Description

The goal of the closing phase is as clear as the name suggests, namely it is **the formal completion of the project.** As simple as it sounds it must also be understood that both the customer and the imc Project Manager / Business Consultant will have two distinct workflows to accomplishing the same goal. The Project Manager/ Business Consultant will begin with an internal task list to initiate the closing process before the closing phase has been initiated. In general, the closing phase, requiring the customers participation, **can be accomplished between two to three weeks**.

At the end of the test phase the Project Manager/ Business Consultant initiates the **Go-live Call** with the customer. The ideal outcome of this call is that there are no open critical tasks that would prevent a **Technical Go-live**.

The **Technical Go-live** is a key milestone within the project as it is the confirmation from the imc Project Manager / Business Consultant that the system has been implemented according to the customers agreed project scope based on the purchase order and is viable for use by the customer. The Technical Go-live also contains the confirmation by the customer.

With the Technical Go-live confirmed, the closing process now begins for the customer. The four key elements of which are: **Project Sign-off, Support Welcome Call, Sunset Meeting, and Customer Go-live.**
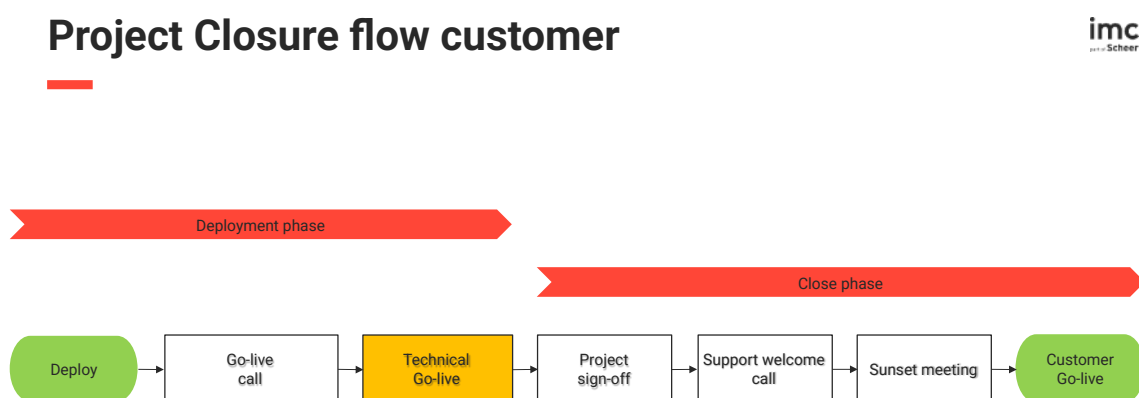
Project Closure flow customer

imc

Figure 2 Project Closure flow customer

In detail these elements are described as follows:

Project Sign-off Document: The main purpose of this document is to clarify within the project team that ordered services are delivered and the software is ready for productive usage. For

official confirmation, imc prepares and provides this document to the customer. Aside from the formal aspects (contact data, version numbering, hosting model), the document summarises relevant data protection and security topics as well as a listing of topics handed over to support upon project closure. Typical topics are:

- **Non-blocking software defects** (if reported during the project phase) are software defects that do not hinder a productive usage and can be fixed after project closure.
- **Outstanding services** are services that are part of the rollout project but do not need to be delivered before project closure / productive usage.
- **Further consulting support** (additional training etc.) after project closure can be provided upon request with a separate order.
- **Identified / not yet ordered Change Requests** are changes reported / identified during project phase that needs to be purchased first.

The document should be signed off by the customer as a confirmation of the project closure and as an acknowledgment of the beginning of the support phase. With the move to the support the contractually **agreed** upon SLAs (service level agreements – the terms under which imc provides the maintenance and support to the customer) take effect. As the governance and responsibilities vary from project to project **it is imperative that the customer defines, well in advance, the individual or individuals responsible for approving the sign-off document**.

It is imperative to understand that the confirmation of the project sign-off document is a prerequisite for the productive use of the system and defines the end of the project and thereby its conclusion. For imc, the productive use of the system is synonymous with the confirmation of the project sign-off document and thus also of the completion of the project.

If no new critical open points are reported by the customer one week after the submission of the project sign-off document, imc assumes that the project sign-off document has been confirmed and considers the project to be completed.

<u>Support Welcome Call:</u> The support welcome call is designed to help the customer understand the scope of services offered by the imc Support Team as well as to enable them to efficiently engage with the support department. Furthermore, it signifies the change from project mode to operational mode. **This means that the responsibility for assisting the customer is transferred from the Project Manager/ Business Consultant to the Support team**. Issues will no longer be raised to the Project Manager/ Business Consultant e.g., via project Jira ticket or email rather, they will be raised using the Service Desk. At the same time access rights to the project Jira will end. In contrast to the project ticket system, whose access was limited to two accounts, the Service Desk allows for access more than two accounts. We recommend that customers also give some thought to keeping the number of accounts to manageable levels, remembering that quality of input trumps quantity. For the Project Manager/ Business Consultant it is essential that the support is briefed on the customers project prior to the Support Welcome Call and that any open questions should have been addressed with the conclusion of the call.

<u>Sunset Meeting</u>: Together with the customer the imc Project Manager/ Business Consultant reviews the project and discusses potential future steps (including open points from the project that are mentioned within the project sign-off document). **This meeting, led by imc reflects on the overall course of the project.** Furthermore, this meeting serves as a handover to imc Sales & Account Management Team for the coordination, the technical aspects such as future developments and improvements of the system.

<u>Customer Go-live</u>: With the Business Consultant having deemed the system to be viable for a Technical Go-live and the Project Sign off documentation having been signed-off, the customer can now put the system into operational use. **The Customer Go-live is not a prerequisite for the project sign-off / closing.** Once the system is deemed viable it is the customers decision as to when the system is made available to the staff, with the decision being made on when to Go-live

imc recommends that the customer informs them of the intended date. Scheduling and planning for a roll-out are not part of the imc scope unless contractually requested.

Important notes:

It is important to note that the closing of the project coincides with the **Technical Go-live** and not the introduction of the system to the customer's end users (**Customer Go-live**). The Customer Go-live is the **sole responsibility of the customer**. In case, there is a fixed and planned Customer Go-live date (e.g., announced course launches according to the rollout plan), all closing activities must be planned carefully before this date and must be reflected within the overall project plan. For imc, **the productive use of the system or a no response to the project sign-off document, one week after receipt, is to be considered as a project sign-off.**