

Project Closeout Checklist

When a project is nearing completion use this list to make sure your team is managing all the tasks that are easily forgotten. Make this a standard operating procedure for all projects.

Final Project Deliverables and Closeout Documentation

Confirm all required deliverables have been completed according to the contract and subsequent additional service agreements.

Verify that all revisions and change orders have been documented and accommodated in the deliverables

Conduct a final quality control check to ensure compliance with project scope and standards

Ensure final drawings, models, and reports are submitted in the required format

Provide a final project summary report, including key milestones and decisions

Get final approved by the client Mark project complete in your firm-management and financial software (BQE CORE, ERP, QuickBooks, CRM, etc.)

Financial and Contract Closeout

Confirm all payments have been received

Submit final invoices for any outstanding work

Reconcile project budget, tracking any overruns or cost savings

Close out any subconsultant contracts and verify final payments

Ensure all outstanding change orders or claims are resolved

Archive financial records related to the project for future reference

Knowledge Capture and Lessons Learned

Conduct an internal project debrief (After Action Review) with the team members

Identify successes, challenges, and areas for improvement

Document lessons learned for use in future projects

Update internal project management tools with key insights

Share best practices with relevant teams or departments

Update any templates or standard operating procedures based on project developments and lessons learned

Client Communication and Relationship Management

Schedule a final client meeting to review project outcomes and feedback

Provide the client with final documentation, user manuals, and maintenance guidelines

Discuss any potential follow-up services, future projects, or extended support options

Request a client testimonial or case study if appropriate

Ask for reviews on other platforms (google, maps, houzz, etc.)

Send a customer satisfaction survey (ideally you send one after each phase of the project)

Ensure client contact details and communication history are updated in the CRM

A thank you gift or package has been sent (Ideally send one week after final project sign-off)

90 Day Check-in: Handwritten Thank You + Check-in Card mailed to all project stakeholders: client, consultants, contractor, etc. (*Consider follow up services you can offer the client*)

Annual project diagnostic walk-through

Interior design services

Furniture design services

Internal Project Closure and Archiving

Schedule a 6-month post occupancy evaluation meeting and walk through

Schedule a 1-year check-in

Store all project files, drawings, and correspondence in the firm's digital archive

Ensure intellectual property, proprietary information, and sensitive data are properly secured

Remove or reallocate project-specific software licenses and cloud storage access

Confirm that all team members have been reassigned to new projects

Scan or store any relevant physical documents

Recycle any unnecessary paper or process documents after scanning them

Post-Project Evaluation and Team Recognition

Conduct a team debrief to discuss experiences and key takeaways

Recognize and acknowledge team contributions to project success

Address any workload concerns or resource allocation adjustments

Provide feedback to subconsultants and external partners

Capture key performance metrics for internal benchmarking

Risk Management and Compliance

Verify that all regulatory and legal compliance requirements have been met

Ensure project warranties, guarantees, and service agreements are documented

Review insurance and liability coverage related to project completion

Close out any outstanding risk management items or safety reports

Confirm that client and firm responsibilities post-project are clearly defined

Transition to Operations and Maintenance (If Applicable)

Provide training sessions or documentation for client facility management teams

Ensure operational manuals, specifications, and as-built drawings are handed over

Support commissioning and post-occupancy evaluations as needed

Marketing and Brand Development

Secure client permission for marketing materials and promotional use

Document project highlights, challenges, and unique solutions for future marketing content

Capture high-quality images, videos, or 3D renderings of the completed project

Engage professional photographers/videographers

Add project to the portfolio page on your website

Create a 1-page cutsheet with images and key project data to add to your portfolio PDF or future RFP/Q responses.

Develop a case study or project spotlight to add to the company website, blog, and/or presentations

Develop a press release for the project and share with relevant media outlets

Share project success on social media, newsletters, and industry publications

Tag the client, the key collaborators, and other project stakeholders

Submit the project for industry awards, speaking opportunities, or publication features

Update marketing materials and proposal templates with relevant project data

Optional: Host a project closeout party at the project or at your office

Invite clients, contractors, sub-consultants (engineers, etc.), media, design team