Closure, transition and handover

This topic has no formulas, so this page gives four key rules, each with a worked example, then the model sheet. They serve IPMA, PMI and APM exams alike.

KEY RULES

Accepted is not handed over: two sign-offs

acceptance: the product meets its agreed criteria · handover: the receivers meet their readiness criteria

The sponsor or customer accepts the product, with the users. The owner who will run it signs the handover: support in place, staff trained, documents complete, open risks and issues passed to named owners. In iterative work, both happen for each release.

`Example: A new service passes all 12 acceptance tests, so the sponsor accepts it. Readiness needs 90% of 40 field staff trained: 0.9 × 40 = 36. Only 31 are, so 5 more are trained before the handover is signed`

End the bridge on evidence, not on the calendar

early-life support or parallel running ends when agreed measures hold for an agreed period

Early-life support keeps the project team on after go-live to fix problems fast. Parallel running keeps the old way going beside the new one. Both cost money, so agree the exit measure before go-live.

`Example: Parallel running costs €3,000 a week; it ends after 2 weeks in a row below 1% of cases needing a manual fix. Weeks 1-4: 2.5%, 1.4%, 0.6%, 0.8%, so it ends after week 4, at 4 × €3,000 = €12,000`

Close the contracts, then the money

final cost = spent + costs still to be invoiced · surplus = budget − final cost · warranty ends = acceptance date + warranty period

Check every supplier obligation, settle claims and agree final accounts. Charge every cost before the accounts close, return the surplus to the sponsor, and hand the warranty dates to the new owner.

`Example: Budget €250,000; €231,000 spent; two invoices of €8,000 and €5,000 still to come: final cost €244,000, and €6,000 goes back. Accepted on 1 March with a 90-day warranty: defects reported by 30 May are the supplier's to fix`

A project stopped early is closed properly too

same steps as a planned close · plus: why it stopped, what can be reused, who owns what is left

Stopping a project whose business case no longer holds is a sound decision, not a failure. Close it on purpose: hand over or store what is usable, close contracts, release people, and report.

`Example: Stopped in month 5 of 8 because a new rule makes its main output unnecessary. Of a €480,000 budget, €310,000 is spent and €20,000 committed: final cost €330,000, so €150,000 is never spent. The report names the 2 finished outputs handed over and the owner of the stored designs`

IN THIS HANDOUT

Sources: IPMA ICB4 (2015); PMI, PMBOK® Guide, 8th ed.; PMI, PMP® Examination Content Outline (2026); APM Body of Knowledge, 8th ed.; APM, PMQ handbook (v6, 2026); IPMA International Certification Regulations (ICR) v4.4 (2025)

Project closure checklist

End a project or a release so the result is accepted, runs in the right hands, and nothing is left open.

STEP	DONE WHEN	WHO SIGNS
1 Accept	Outputs meet the agreed criteria; the warranty starts	Sponsor or customer, with users
2 Hand over	Receivers ready: support, training, documents, open risks	The receiving owner
3 Close contracts, money	Obligations met; accounts closed; surplus returned	Contract owner; sponsor
4 Release the team	People reassigned in time; new skills recorded	Project manager, line managers
5 Report and close	Closure report approved; records archived	Sponsor or board, at a final gate

The series' own summary of what IPMA (International Project Management Association), PMI (Project Management Institute) and APM (Association for Project Management) ask for. In iterative work, steps 1 and 2 repeat for each release.

WHAT IT IS

Closing has five steps, each with its own **signature**. Do not confuse **acceptance** (the product meets its agreed criteria) with **handover** (the people who will run it are ready). Early-life support or parallel running bridges the gap, and ends on evidence. It works for a project stopped early too.

HOW IT WORKS

01 At the start: agree the receivers, the criteria and who signs.

02 Accept; note what the warranty covers and when it ends.

03 Bridge to handover; end the bridge on agreed measures.

04 Close the rest; if stopped early, record why.

MID-LEVEL · WORKED EXAMPLE

Apply it well

The situation: A city team has eight months to move resident parking permits online. Go-live comes a few weeks before most residents renew in January.

The project manager agrees acceptance criteria and a handover checklist early with the service desk and the IT team. After go-live, the team stays on as early-life support through the January renewals. The sponsor accepts the product; the receivers sign the handover when their checklist is met.

In the exam: Name the criteria, who signs acceptance and who signs handover, how long support lasts and what ends it, and one open item with its owner.

SENIOR · WORKED EXAMPLE

Design and lead it

The situation: A city is joining 14 online services under one login over 30 months, group by group. Its 9 old portals must close once the new services work.

Each department accepts its services against agreed criteria. The old portals run in parallel and close in the final phase, on evidence. The project manager agrees with the steering board who will own and fund the platform, and moves the platform supplier's support contract to that owner.

In the exam: Show the transition you designed: readiness criteria per release, who decides on what evidence, what runs in parallel, and who owns the product after closure.

WHERE IT SITS

IPMA · ICB4	PMI · *PMBOK® GUIDE* 8 · PMP® EXAM	APM · BOK 8 · PMQ EXAM
4.5.10.6 (p. 140): closing and evaluating phases and the project. Value only once used: 4.5.13 (p. 150)	Guide: Close Project or Phase, §2.1.6.9 (pp. 31–33). Exam outline: Process task 10 ('transition')	BoK (APM's Body of Knowledge) §3.6 Transition into use; 'closure report', §3.6.3. PMQ (APM's Project Management Qualification) objectives 8 and 22d (closing the finances)

Sources: IPMA ICB4 (2015); PMI, PMBOK® Guide, 8th ed.; PMI, PMP® Examination Content Outline (2026); APM Body of Knowledge, 8th ed.; APM, PMQ handbook (v6, 2026)