

The Close-Out Checklist

Use this checklist to close the project properly. Work through it in order, and do not tick a box until the evidence is in your hand.

1. Handover and sign-off

	Action	Owner	Date	Notes
☐	Process owner understands the changes and has accepted the control plan	Process Owner		
☐	SOPs are in place and all relevant staff are trained	Yellow Belt		
☐	Visual management and KPIs are live and understood	Process Owner		
☐	Storyboard or A3 is complete and readable by someone not involved	Yellow Belt		
☐	Sponsor has reviewed the results against the SMART objective	Sponsor		
☐	Sponsor has signed off the project as closed	Sponsor		

2. Benefits confirmed by finance

	Action	Owner	Date	Notes
☐	Actual results compared with the baseline from Measure	Yellow Belt		
☐	Hard benefits calculated using the agreed method	Yellow Belt		
☐	Finance has reviewed and confirmed the figures	Finance		
☐	Soft benefits recorded with the evidence behind them	Yellow Belt		
☐	Final figures entered on the storyboard or A3	Yellow Belt		

3. Three-month check

	Action	Owner	Date	Notes
☐	Date booked in the diary now, not later	Yellow Belt		
☐	Control plan measures reviewed against target	Process Owner		
☐	SOP adherence checked with a spot audit	Process Owner		
☐	Any slippage investigated and an action agreed	Process Owner		
☐	Result shared with the sponsor	Yellow Belt		

4. Six-month check

	Action	Owner	Date	Notes
☐	Date booked in the diary now, not later	Yellow Belt		
☐	Benefits still being delivered and still confirmed by finance	Finance		
☐	Process still running to the SOP, with no quiet workarounds	Process Owner		
☐	Visual management still in use and up to date	Process Owner		
☐	Decision recorded: close monitoring, continue or reopen	Sponsor		

5. Lessons learned

	Action	Owner	Date	Notes
☐	Team session held within two weeks of closure	Yellow Belt		
☐	What went well, what did not and what we would do differently captured	Yellow Belt		
☐	Lessons shared with the sponsor and other Yellow Belts	Yellow Belt		
☐	Opportunities to replicate elsewhere passed to the sponsor	Sponsor		