


1

Introduction

- A project kick-off meeting is the best opportunity for a project manager to **energize** his or her team.
 - can establish a **sense of common goal**
 - start understanding each individual.
- a project kick-off meeting is a meeting with all the stakeholders of the project
- a successful project kick-off meeting
 - requires proper planning
 - some steps help you
 - to stay focused
 - establish and demonstrate leadership
 - help integrating individual members into the project team



2

Meeting preparation

Step 1: Develop the project goals and deliverables
Defining these elements will drive the decisions you must make for staffing the project and developing the project plan. Write them down and validate your definitions with the project owners (whoever justified and initiated the project).

Step 2: Identify the project team members and their responsibilities
Resource needs vary based upon the size, complexity, and nature of the project. Include resources from four key groups, as needed, to fully support your project:

- Operations
- Corporate support
- Management
- Technical

Develop a project team **contact list** that includes the name, responsibility, department, physical location, phone number, fax number, and e-mail address for each member. You'll want to **distribute** this to the team.

Step 3: Develop a project assumptions list
It's important for project team members to be aware of major assumptions that apply to the project. For example, spell out the assumption that each team member has been selected and made available to the project by their manager to ensure its success. That assumption means **that their assigned tasks must take priority**, and each participant must be committed to the success of the project if they are to participate

3

Meeting preparation

Step 4: Develop the preliminary project plan
Realize that the plan is not carved in stone at this point. Actually, it should never be. Up until the kickoff meeting, it is a knowledgeable draft. Once you have the team assembled and assign clear responsibilities, you should ask team members to validate their task responsibilities and timeframes for reasonability, completeness, and accuracy. The plan will become more established at the first project status meeting.

Step 5: Define key success factors
Every project team member needs to know what it takes to have a successful project. Take the time to define in specific terms each item that will be required for success. Validate your list with the project owner(s).

Step 6: Schedule the project kickoff meeting
It is important for all project team members to participate in the kickoff meeting. Send a communication to each participant with a preferred time and date and include options in case they are unavailable. Even if someone is "out of pocket," he or she can participate by phone.

Your goal here is to assemble the entire team so they all hear the same message at the start of the project. Instruct all participants to look for meeting materials on a specified date and to prepare for the meeting by reviewing them.

As soon as you have a firm time and date, schedule a conference room and phone services to support conference calls, as needed.
Plan for a 90-minute meeting.

4

Meeting preparation

Step 7: Send the kickoff meeting materials to all participants

On your designated date, send a package of meeting materials to each participant, including:

- Meeting time and date
- Meeting agenda
- Project participants' contact information
- Project plan draft

Ask each person to review the project plan carefully. Indicate that additional information will be discussed at the kickoff meeting and everyone should be familiar with his or her part of the plan. Explain that there will be a Q&A session at the meeting to answer any questions.

Step 8: Identify key issues and project dependencies

Review the project plan prior to the kickoff meeting and make notes on points that you want to make at the meeting. Pertinent items include potential bottlenecks, impact issues, risk areas, etc.

5

The Agenda

- A strong and clear agenda is a **must** for a project kick-off meeting.
- The agenda usually includes
 - purpose of the project
 - deliverables and goals
 - key success factors of the project
 - communication plan
 - the project plan
 - Questions
 - Recap/summary
- In advance to the project kick-off meeting, make sure that you circulate the meeting agenda to all the participants
 - all the participants are aware of the structure and what to achieve at the end of the meeting



6

Getting Started

- When the meeting starts, the project manager should take the charge of the meeting.
- Next, all the participants should be **welcome** and a round of **self-introduction** should take place.
- Although you have already shared the meeting agenda with the participants, briefly take them through the agenda while giving a brief introduction to each item in the agenda
- Pay more attention towards introducing the project roles and *emphasize the reasons why the team members were assigned to respective roles*
- If there are people playing stretched roles, acknowledge about it. When you do all these things, do not go into detailed. The purpose of this meeting is to take everyone on to the same platform

7

Project Presentation

- Once the tone is set, present the agenda in a structured manner.
- Present the scope of the project, major deliverables to be produced, the risks and assumptions, and the estimated effort and duration
- **Explain why the project is being undertaken**
 - draw on discussions with project sponsors, recounting the ideas and concerns that led up to undertaking the project
 - explain the perceived need and the **expected rewards** following successful project completion
 - point out the priority the project has within the organization

This explanation helps the team to recognize the importance that management places on the project and assures that management will support the resources committed to the project
- **Present the project specification**
 - note that the project's success is measured by how closely the finished product measures up to the specification.
 - explain the procedures for implementing changes to the specification
 - Experienced team members typically are accustomed to project objectives being changed during a project's execution. They will need assurance that these *interruptions and intrusions* are well recognized by the project manager and will be carefully monitored and controlled.

8

Project Presentation

- Present your reasoning behind the plan and **convey the message that you are open to suggestions when the project progresses**. Go through each task in the project plan and elaborate sufficiently.
- **Emphasize the fact that the project plan and the schedule are still at the initial stage** and that you are expecting everyone's assistance for making it complete.
- Identify and acknowledge the potential *bottlenecks* or *challenging* tasks in the project schedule

9

Setting the Expectations

- Decide on a convenient time to hold **regular meetings** to talk about project progress. Emphasize the need of everyone's participation for the regular meetings.
- Teamwork is one of the most important expectations to be set. You need to elaborate more on teamwork and plan some **teamwork activities** just after the project kick-off.
- Talk about the time sensitive nature of the project and how the leaves are granted during the project period.
- If the project requires working long hours, letting them know in advance and showing them how you can help them to maintain the work-life balance is a good strategy.
- During the meeting, empower the team members to carryout certain tasks and make them responsible.

10

Communication Plan

- Communication is one of the main aspects of a project.
- The project kick-off meeting should emphasize more on the communication plan for the project.
- Meetings during the project lifecycle:
 - Weekly status meeting
 - Project plan updates
 - Task and activity planning sessions
 - Management updates
 - ...
- You can emphasize on the other communications channels: email communications, forums, etc.

11

Feedback and Closure

- At the end of the kick-off meeting, open up a **Q&A** session that allows the team members of freely express themselves.
 - If the time is not enough to facilitate all the team members, ask them to send their queries and feedback via email. Once you have a look at those emails, you can setup another discussion to address those.
- Never drag a planned meeting too much, since it could be a bad example.
- Before everyone leaves, summarize the meeting and callout the action items and next-steps.

12

Action Item

- **Definition Action Item:** A task assigned to a project participant
 - What?, Who?, When?
 - Heuristics for Duration: be done within two weeks or a week
- Action items should be tracked by the project manager
- They should appear on the meeting agenda in the Status Section
- Examples of Todos:
 - Unit test class Foo
 - Develop project plan.
- Example of action items:
 - Bob posts the next agenda for the context team meeting before Sep 10, 12 noon.
 - The test team develops the test plan by Sep 18

13

Conclusion

- There are four main areas that should be emphasized about holding project kick-off meetings
 - Be prepared for the kick-off meeting. Demonstrate your ability to organize and lead
 - Empower your team members. Assign them responsibilities
 - Develop and nurture teamwork
 - Demonstrate your leadership qualities

14