**Kick-Off Meeting Checklist Template**

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**Kick-Off Meeting Checklist**

**<Project Name>**

**Company Name**

**Street Address**

**City, State Zip Code**

**Date**

**Kick-Off Meeting Checklist**

A project kick-off meeting signals the start of a new project. It’s an opportunity to introduce all the team members (including the client if applicable) and helps to get everyone on the same page. This checklist includes everything that needs to be accomplished prior to, during, and after a project kick off meeting. To edit this document, under the Developer tap, click on “Protect Form”.

**Pre-Meeting Checklist**

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| --- |
| Develop a Iist of invitees |
| Schedule a time and a room for the meeting. (Arrange for IT if virtual.) |
| Send invitations 3 days prior to the meeting. |
| Assign note taker for the meeting. |
| Develop meeting agenda. |
| Send agenda out at least 24 hours prior to the meeting. |
| Create a sign-in sheet with space for attendee name and contact info. |
| Send a meeting reminder the day before the meeting. |

**The Meeting Checklist**

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| --- |
| Have attendees sign in. |
| Introductions. |
| Agenda (includes main points of the meeting: scope of work, timeline, deliverables, communication methods, success tracking, etc.) |
| Q&A |
| Review Action Items (What action is needed and who is responsible?) |
| Announce next meeting if known. |
| **Notes**  Non-agenda items to be dealt with at a later time: |

**Post-Meeting Checklist**

|  |
| --- |
| Review and edit meeting minutes. (include attendees and contact info.) |
| Distribute Meeting Minutes. |
| Check status of action items. |
| Devise follow-up action for resolving non-agenda items. |
| Update/Revise project plan if needed and distribute. |
| Schedule meeting space if needed for upcoming meetings. |

**Other templates you may find helpful:**

Meeting Minutes:

<https://www.projectmanagementdocs.com/template/project-documents/meeting-minutes/>

Meeting Agenda:

<https://www.projectmanagementdocs.com/template/project-documents/meeting-agenda/>

**Articles you might find useful:**

How to Conduct a Risk Assessment Meeting:

<https://www.projectmanagementdocs.com/blog/how-to-conduct-a-risk-assessment-meeting/>

The Daily Scrum Meeting: Everything You Need to Know:

<https://www.projectmanagementdocs.com/blog/the-daily-scrum-meeting-everything-you-need-to-know/>

How to Conduct a Successful Meeting:

<https://www.projectmanagementdocs.com/blog/how-to-conduct-a-successful-meeting/>

Tips for Effective Project Meetings:

<https://www.projectmanagementdocs.com/blog/tips-for-effective-project-meetings/>

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