

Kickoff Meeting Agenda

| | | | |
|---------------------|--|---------------------|--|
| Project Name/Number | | Project Owner | |
| Meeting Location | | Call-in Number | |
| Project Manager | | Meeting Date & Time | |

| Invitees | Project Role |
|----------|--------------|
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |

| MEETING AGENDA | |
|--|----------------|
| I. Introductions | Estimated Time |
| 1. Project manager | |
| 2. Project team members | |
| 3. Key stakeholders | |
| 4. Project sponsor | |
| <p><i>Welcome from the Project Manager and a brief statement regarding the purpose of the meeting. Introductions from the project team members and key stakeholders. Introduction and statement from the sponsor. Each person to state his or her name, role in the project, and specific experience or expertise.</i></p> | |

| II. Assignments for the Meeting | Person Responsible | Estimated Time |
|---|--------------------|----------------|
| 1. Sign-in sheet | | |
| 2. Action Items and Issues | | |
| 3. Q & A and Decisions | | |
| <p><i>Assign one person to ensure everyone signs in. Assign one person to capture all action item descriptions, the person responsible and the action item due date. That person will also record issues as they're identified. Assign one person to document all questions, the name of the person who asked the question, and the answer provided. That person will also document all decisions needed.</i></p> | | |

| III. About the Project | Estimated Time |
|--|----------------|
| 1. Project description and why the project is needed | |
| 2. Benefits of performing the project | |
| 3. Project goals and the success criteria | |
| <i>Describe the project and its benefits. Set forth the goals of the projects and state what must happen for the project to be considered successful. Work to motivate and inspire the project team.</i> | |

| IV. Approach and Methodology, Lessons Learned | Estimated Time |
|--|----------------|
| 1. Describe the approach to executing the project. | |
| 2. Describe the execution and project management methodology. | |
| 3. Brief review of lessons learned. | |
| <i>Explain the selected methodology and its benefits for this project. Review pertinent lessons learned.</i> | |

| V. Project Planning | Discuss | Estimated Time |
|--|--|----------------|
| 1. The Project Management Plan | Review its purpose. Relate that it is a preliminary draft. Describe how it becomes elaborated with progression. | |
| 2. Assumptions | Review assumptions log. Assign assumptions for validation. | |
| 3. Scope Management Plan | Review scope and change control procedures. Review for reasonableness and completeness. | |
| 4. Time Management Plan | Review schedule and milestones. The project team will review the activities list for reasonableness as to schedule and completeness. | |
| 5. Cost Management Plan | Discuss invoicing, expenses, receipts, timesheets, and travel costs. | |
| 6. Quality Management Plan | Review acceptance criteria, quality requirements and the quality assurance and control processes. | |
| 7. Human Resource Management Plan | Review contact list, roles & responsibilities, solicit training needs, review commitments and availabilities to work to schedule. | |
| 8. Communications Management Plan | Discuss communication mediums, weekly status reviews/reporting and client review meetings. Discuss project plan updates. | |
| 9. Risk Management Plan | Review risk register, identify additional risks. | |
| 10. Procurements Management Plan | Review planned procurements. | |
| 11. Stakeholders | Review stakeholder register for additional identifications. | |
| <i>Review each of the subsidiary plans and assign action items, decisions needed and issues.</i> | | |

| VI. Rules, Standards, Regulations | Estimated Time |
|---|----------------|
| 1. Review applicable standards | |
| 2. Review applicable regulations or laws | |
| 3. Review client requirements | |
| 4. Review requirements of performing organization(s) | |
| <i>Discuss all rules, standards and regulations that must be followed. Examples may include requirements to obtain written sign off at each phase or deliverable or a regulation that speaks to performance of the project.</i> | |

| VII. Review Action Items | Estimated Time |
|---|----------------|
| 1. Prompt the person responsible for documenting the action items. | |
| 2. Quickly review the action items. | |
| 3. Communicate date of first client review meeting. | |
| 4. Communicate date of first project status meeting. | |
| <i>Remind everyone that the action items will be listed in the meeting minutes.</i> | |

| VIII. Questions and Answers | Estimated Time |
|---|----------------|
| 1. Prompt the person responsible for documenting the Q & A session. | |
| 2. Open for Questions and Answers | |
| <i>If time runs short, ask that questions be emailed to you.</i> | |

| IX. Collect Documents | Estimated Time |
|--|----------------|
| 1. Collect the following documents: sign-in sheet, action items, Q & A documentation, decisions needed document, and the issues documentation. | |
| 2. Close the kickoff meeting | |
| <i>Collect the documents and thank everyone for their time. Relate that the meeting minutes and action items will follow.</i> | |

Notes:

For additional project management templates visit www.mypmllc.com/project-management-resources/free-project-management-templates.