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Kick-off Meeting Checklist

Preparing the meeting

This checklist helps you plan a kick-off meeting – and any other presentation.

OBJECTIVES AND PARTICIPANTS

- ☐ Define the objectives of the kick-off meeting: what do I expect? What should the outcome be?
- ☐ Draw up the list of participants: all team members, the client, key stakeholders and the project sponsor
- ☐ Send out invitations (the project manager does this!)

CONTENT AND RUNNING ORDER

- ☐ Finalise the content
- ☐ Draw up the agenda
- ☐ Define the running order
- ☐ Draw up the schedule
- ☐ Check ALL documents for completeness – including topics not on the agenda: there will be questions
- ☐ The project plan is watertight
- ☐ Presentation agreed with the client
- ☐ Send the agenda to everyone shortly before the kick-off meeting

ROOM, EQUIPMENT AND CATERING

- ☐ Book the room in good time (!)
- ☐ Plan the technical equipment and book it in good time (!)
- ☐ Plan B in case the technology fails
- ☐ List the equipment needed (projector, flipchart, whiteboard …) and order it in good time
- ☐ Order buffet / catering and drinks (in good time – yes, really …)

ROLES IN THE MEETING

- ☐ Will the meeting be facilitated? If so, by whom?
- ☐ Who takes the minutes?
- ☐ Is a round of introductions needed?
- ☐ Is there a list of speakers?
- ☐ Name cards – or does everyone know each other?

WHAT WILL BE PRESENTED?

- ☐ Objective and benefit
- ☐ Schedule and milestones
- ☐ Project organisation
- ☐ Strategy and vision
- ☐ Team and roles
- ☐ Communication channels

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