Project Kick-off: Kick-off Planning Template

Instructions

This document is intended to support the project manager as he/she prepares to kick-off the project. Several activities are involved with preparation, including the kick-off meeting and stakeholder communication planning. Included in this document are 1) a kick-off meeting activity checklist, 2) a kick-off meeting agenda template, 3) guidelines on developing a stakeholder communication plan and 4) a sample project timeline format.

Project Kickoff Activity Checklist

1. Obtain and review project charter.
2. Understand and confirm project funding.
3. Understand and confirm project team members (roles, responsibilities, time commitment and availability).
4. Understand and confirm project timeline, in light of resource availability identified above (sample timeline format included in this document).
5. Develop stakeholder communications plan (with input from team members and key stakeholders).
6. Identify who should be attending kick-off meeting (project team, key stakeholders, project sponsors, others).
7. Determine the amount of time you'll need for the kick-off meeting (generally not more than 2 hours).
8. Email all meeting participants to understand their availability for a meeting date and time or utilize Outlook Calendar to assess common availability.
9. Arrange meeting room and technology (projector, screen, etc.).
10. Coordinating calendars, schedule kick-off meeting with everyone involved.
11. Create meeting materials including:
12. PowerPoint or other presentation (see agenda below)
13. Handouts (project charter, timeline, contact lists, other)
14. If needed, create a shared folder for electronic files related to the project. You may want to have a folder for the project team (technical team) and a separate folder for users and key stakeholders. Create access permissions as appropriate.

Kickoff Meeting Agenda Template

This standard meeting template outlines the most typical items included on a kick-off meeting agenda. The project manager is responsible for creating the meeting agenda using the template below. Sections can be added and deleted as needed.

Project Name:

Project Manager Name:

Meeting Date:

Meeting Time:

Meeting Location:

Agenda:

1. Introductions – *very brief identification of people at the meeting and their role on the project.*
2. Project Overview – *a general overview of the project would include:*
   a. Who/what the project is supporting (a college, a research team, an operational department, etc.).
   b. A summary of the stated problem that is being resolved.
   c. A summary of the technology being used on the project
   d. How the project is funded
3. Project Details – *more specific details including:*
   a. Scope, Goals, Objectives
      i. What the project is intended to accomplish
      ii. What the project is not intended to accomplish
   b. Project Timeline – *High-level Project Plan*
      i. Key milestones
      ii. Key target dates
   c. Identified challenges and risks
4. Project Team Roles & Responsibilities – *distribute and discuss a list of project team members, their contact information, and their roles/responsibilities. Don't forget to talk about yourself as the project manager. Everyone needs to know what to expect from you with regard to communication, process, timelines, etc.*

At the project kickoff meeting, the team should assign a Subject Matter Expert (SME) to be a liaison to NUIT Communications to provide technical information/documentation so they can translate that information into user-friendly terms.

5. Users' Roles & Responsibilities – *distribute and discuss a list of users/customers, their contact information, and their roles/responsibilities.*

6. Stakeholder Communications – *distribute and review the stakeholder communications plan that was developed prior to the meeting.*

7. Next Steps – *A specific instruction to everyone about what is happening next, including what each person is expected to do.*

Team and Stakeholder Communication Plan

Managing team and stakeholder communications is one of the most important tasks for project managers. Consistent, effective communications is critical among everyone involved in the project and the key element in keeping the project on track. Use this checklist to plan, track, and distribute the different types of team and stakeholder communications that can occur during the life cycle of a project.

Note: The project manager should include team members and key stakeholders in the development of this communication plan to ensure all perspectives are addressed.

Identify all team members and key stakeholders that should receive ongoing communications throughout the project.

Identify the types of ongoing communication that will be employed.

Team Meetings/Minutes   One-on-one Meetings

Email Correspondence   Document Retention

Project Status Reports   Other

For each stakeholder identified above, identify the type of communication (from above list) to be used and the frequency of the communication. The more specific you can be about the frequency/schedule, the more effective the plan will be.

Define the content of each communication implemented (consider the audience, level of detail needed, metrics, etc.). For example, this PM Framework includes a

standard format for project status reports. Team meeting agendas can be similarly standardized for consistency.

The Stakeholder Communication Plan can be easily developed in a chart format. The following sample chart can be used as a guide for the project manager. It is important to talk with project team members and key stakeholders as you prepare this plan.
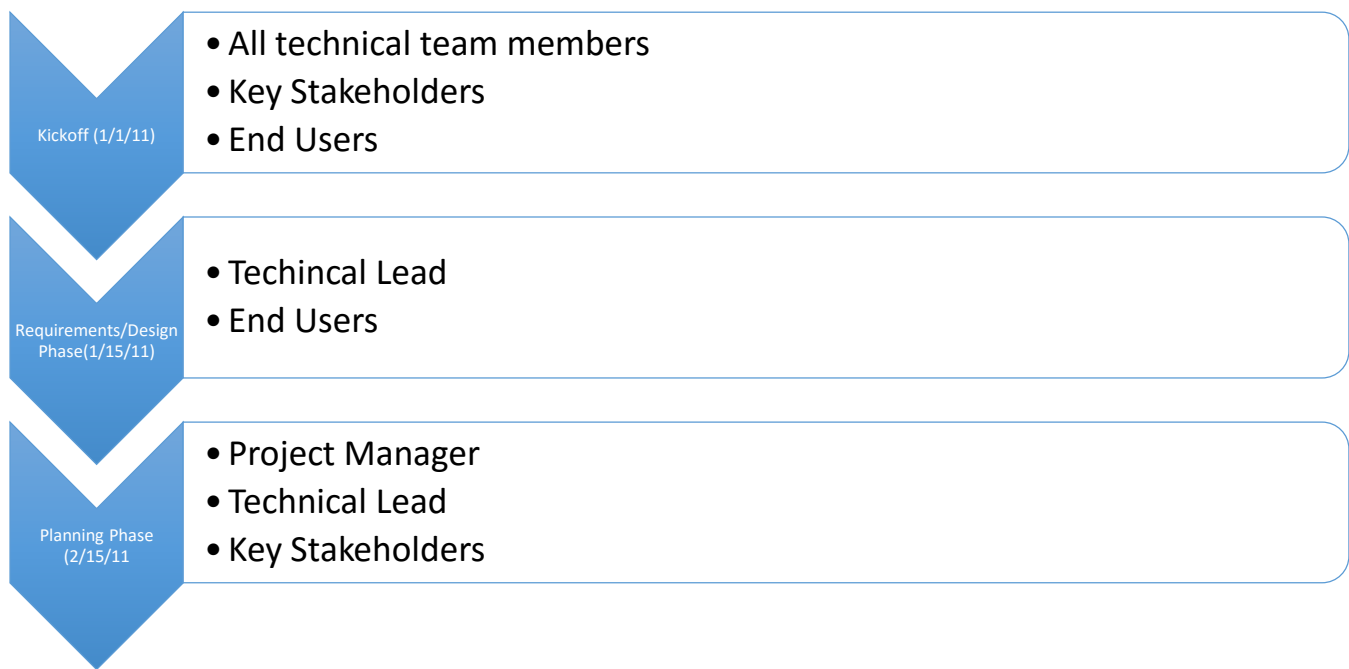
Communication	Purpose	Audience	Author	Vehicle	Frequency
Status Reports	To keep key stakeholders informed of progress, issues, and solutions.	NUIT management, client contact	Project manager	Email	Monthly
Team meetings	To ensure all team members are apprised of progress, changes, and current priorities	Project team members	Project manager	Face-to-face	Weekly, Wednesdays 9:00 – 10:00
Email Communications	To distribute meeting minutes, alert team members to document changes posted, share information and answer questions between meetings.	Project Team members, Client contact, management	Project team members, Client contact, management	Email	As needed
Shared Project Folder	Retains all current project documentation.	Project team members	Project Manager, project team members	<Shared Folder Location>	Upload revisions within 24 hours of the change.

Sample Project Timeline

Option 1: high-level timeline of each phase of the project

Project Launch (1/1/11)	Requirements and Design (1/15/11)	Planning (2/15/11)	Execution (3/1/11)	Testing (6/1/11)	Training (7/20/11)	Deployment (8/1/11)	Post-implementation (8/15/11)

Option 2: includes the people involved at each phase (only a partial timeline is presented below)

Kickoff (1/1/11)
- All technical team members
- Key Stakeholders
- End Users

Requirements/Design Phase(1/15/11)
- Techincal Lead
- End Users

Planning Phase (2/15/11
- Project Manager
- Technical Lead
- Key Stakeholders

Document Tracking

Date	Action Taken	By Whom