

# Project Team Development: Planning Project Team Kick-off Meetings



## Why?

The purpose of a project kick-off meeting is to formally notify all project stakeholders that the project has begun and to secure strategic alignment by communicating roles, responsibilities, expectations, goals and time lines. The kick-off meeting should engage project team members and stakeholders by formally setting the stage for the start of the project. For coordinating the meeting, there should be an agenda, presentation and project material. There are a number of specific topics you will want to cover at this meeting and people you will want to invite to ensure your project accomplishes its objectives.

## Who to Invite?

In general, the project's team, leadership and stakeholders should be in attendance. These are individuals or groups who can assist in achieving the project's desired results. If you would prefer a smaller meeting that would include only the project's core team, plan a subsequent kick-off meeting to include all other stakeholders who will be supporting the project in some capacity. And remember to send kick-off meeting packets to those stakeholders who could not attend the meeting. The primary people to invite include:

- Project team members
- Sponsors
- A member of the Training and Organizational Development team for a facilitated session on team development specifically for the project team
- If appropriate, collaborators from functional areas or employees with specialized skill sets that contribute to the success of the project. Examples include:
  - IT personnel
  - Communications personnel

- Project Management personnel
- Finance personnel
- Managers who are loaning resources to the project
- Business owners
- Consultants and partners

You will want to send an appointment with a memo of invitation that includes the meeting's agenda.

## What to Include at the Meeting?

- Power point slides with project logo
- Day's agenda
- Power point presentation:
  - What is the project?
    - Purpose of project
    - Scope
    - Major deliverables
    - Risks
    - Assumptions
    - Estimated effort and budget
    - Deadline
  - Why is it being initiated?
  - What needs to be accomplished?
  - How today looks v. tomorrow
  - How will your organization benefit from the project?

- What are the changes that the project will introduce?
- Timeline for implementation
- Who is involved?
- Vendor selection
- Training
- Questions and Discussion
- A notebook for attendees that includes:
  - Day's agenda
  - Business Case, Project Charter, Graphic linking project to company's strategic plan
  - Project organizational structure
  - Major milestones
  - Phone numbers
  - Consultant/Vendor information
- Project banner
- Beverages and food
- Shirts or cups or team paraphernalia (depending on the project's size) with team logo
- White board

## Determining the Meeting Location

Select a meeting location that first and foremost reflects the geographical location of the project team and the project's stakeholders. Second, reserve a room that is suitable to your group's size, allows for interaction and accommodates possible snacks or drinks. For practical reasons, people tend to feel more comfortable in larger rooms.

## Facilitating the Kick-off Meeting: What to Say

Preparation is key in running a successful project kick-off meeting. Think of the old expression about having only one single opportunity to make a positive first impression. The same is true with your project kick-off meeting. The meeting should be used as a vehicle to engage as many stakeholders as possible in helping your project meet its

objectives. If your kick-off meeting includes poorly presented material and attendees find the meeting confusing or a waste of time, these perceptions will possibly dominate and remain with project stakeholders for the life cycle of the project.

Once the agenda is developed, the project manager should first gain the approval of the sponsor prior to distribution to the project's team or other stakeholders and ensure the sponsor is in agreement with how the kick off meeting will proceed. Below are some topics/talking points for facilitating the meeting:

- Review Agenda
- Deliver opening remarks
- Introduce Executive Sponsor(s)
- Sponsor(s) speaks
- Introductions of team/major players
- Review project charter, business case, strategic direction, what company is trying to accomplish with project
- Clearly articulate expectations
- "Your role in contributing to the project's success." Discuss the important roles and responsibilities of the project team, partners, collaborators and stakeholders. This part of the meeting should address any confusion about roles, responsibilities and what the project needs from each individual to succeed.
- Discuss accountability & the importance of taking our functional hats off
- Communications planning on a project: why it is important
- Communications outside of the project: your role as a project spokesperson
- Team building exercise. Share the following:
  - Working styles
  - The skill mix and knowledge that each person brings to the team
  - Preferred communication style

- Strengths and weaknesses
- Establish team values or ground rules for conducting business, rules that govern a project's operations
- Recap project messages and communicate key project information