

Planning Kick-off Meeting—Activity Definition**Purpose:**

The objective of this activity is to review the approved Project Overview Statement, to set expectations, to articulate any risks that are likely to occur, and to dispel any doubts that the team may have.

Participants:

The Project Manager calls for the meeting.

The audience includes the relevant stakeholders (i.e. customer representative and affected business units) and the core project team.

Inputs:

Project Overview Statement [1], Business Case [4], Governance Document [4]

Process:

1. Schedule the meeting. Send out the agenda of the meeting in advance. The management and the project team need to be present for the meeting.
2. Walk the team through the Project Overview Statement.
3. Set guidelines for the project planning phase and articulate expectations for the planning activities from the core project team.
4. Hand out copies of the Project Overview Statement and discuss the roles and responsibilities/governance document.
5. Discuss project timelines.
6. Discuss the overall approach of the project. This is the point at which brainstorming for the project starts.
7. Discuss risks, constraints and assumptions.
8. Answer any questions that the management or project team may have.
9. Assign someone to take notes during the meeting. Identify action items and timelines. Send out the notes to relevant stakeholders.
10. Determine (in advance) whether you want to discuss the Project Approach in the same meeting or in a separate meeting.

Outputs:

Notes taken during the kick-off meeting

Planning Kick-off meeting—Guidelines**Prior to the meeting:**

1. Send out a meeting announcement with a meeting agenda to attendees with the project objective, meeting objective and time frames. Team members are required to 'RSVP' to you. That requirement needs to be stated in the meeting announcement.
2. Take copies of the agenda to the meeting for the participants.
3. Prepare handouts for the meeting, if necessary

During the meeting:

4. Make sure all the items in the agenda are discussed.
5. The start and end date of the planning phase needs to be articulated.
6. The Project Overview Statement and the Business Case (if applicable) could be handed out during the meeting. Discuss all the elements in the Project Overview Statement.
7. Distribute the Project team Organizational Chart from the Governance document. It is imperative this is distributed during this meeting. If it is not official yet, create a draft. Discuss roles and responsibilities.
8. The team needs to know their part in the project. Inform them that you will be discussing their responsibilities with them.
9. Project team Rules need to be set in the Kick-Off meeting. Start them off with one rule and give them a time limit to come up with more.
10. You need to let the team know what you expect from them as a group. e.g. They need to know that all information regarding the project needs to be validated by you before anyone else receives the information.
11. Discuss any existing issues and assign the issues to team members for resolution.
12. Discuss what resources and tools will be used for the project. Discuss where the project repository will reside.
13. Consider what skills the team can bring to determine the Project Approach and the WBS.
14. Emphasize the importance of the planning activities schedule.
15. The Project Manager may choose to discuss the overall approach of the project in this meeting or arrange for a separate meeting for this purpose. The Project Manager should consider which stakeholders need to be involved in the Project Approach meeting. Other factors that could be considered are the length of the meeting, the information that one would want the customer to hear, and the decisions that the customer should participate in.
16. Answer any questions that the team or other stakeholders may have.

After the meeting:

17. Identify action items and send out the notes taken during the meeting to all relevant stakeholders