Project Kickoff Meeting Agenda Template

Hold a kickoff meeting to start project planning or a new activity



A kickoff meeting sets the stage, gets stakeholders on the same page, and generates excitement around a new project. The purpose of the meeting is to make sure the project team has a common understanding of the project scope, timeline and individual team members’ roles. Like all formal project meetings, there should be an agenda and meeting notes distributed to the team.

## Instructions

* Conduct a kickoff meeting after a project is authorized to begin, typically after the approval of a project charter.
* Distribute the kickoff meeting agenda prior to the meeting, usually 2-3 days in advance, but no later than 24 hours beforehand.
* The purpose of the kickoff is to launch the new project and introduce the team roles and responsibilities to achieve the project objectives and goals.

## Helpful hints

* This kickoff meeting agenda template is intended to serve as a starting point and should be modified to suit your needs.
* Boxes marked “note to author” (indicated with a lightbulb icon) are intended to serve as guidance and offer prompts as you populate the template, and should be deleted before the document is finalized.
* If feasible, the participants and their role in the meeting should be identified to ensure efficient use of time and that the meeting objectives are met.
* A standing agenda of key topics to be covered on a recurring basis can be established so that participants know what is expected to be discussed.

# Project Kick-Off Meeting Agenda

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| --- | --- |
| **Date/time** |  |
| **Meeting name** |  |
| **Location** | [Address, web conference information, conference call number, etc.] |
| **Facilitator** | [Who should facilitate] |
| **Participants** | [Who should be invited/participate] |

## Objective(s)

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| --- | --- |
|  | **Note to author**: Consider these key questions in framing project meeting objectives: |
| * What must we accomplish in this meeting? * What decisions must be made in this meeting to ensure we stay on track with the critical path? * Are we behind or ahead of schedule? Are all parties up-to-date on task updates? * Where we do stand with the project budget? * Are we within budget, time and scope constraints? Quality constraints? * What new or anticipated issues need further discussion by the team? * Do all team members know next steps (with due dates and required resources)?] | |

### Sample objectives:

* Familiarize the project team with the project approach and charter including the purpose, scope and major deliverables.
* Discuss the project process including the project management framework, governance and schedule.
* Clarify project team roles and responsibilities.

## Agenda

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| --- | --- |
|  | **Note to author**: Consider starting the meeting with a review of the meeting objectives and agenda items. Depending on the nature of the meeting, it may be appropriate to ask for any additions to the agenda. Always close the meeting with a review of action items and next steps. |

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| --- | --- | --- |
| **Topic** | **Facilitator** | **Time** |
| 1. Introductions    1. DOH project sponsor, lead and team (including IT)    2. Other agency participants    3. Vendor/contracted consultants | [*Project sponsor, lead or project manage*r] |  |
| 1. Project background/context    1. Current state challenges/problem to be solved    2. Reasons to undertake this project at this time    3. Risk(s) of not taking action | [*Project sponsor, lead or project manager*] |  |
| 1. Project approach and charter    1. Project workspace/document repository    2. Project charter       1. Key milestones       2. Project constraints | [*Project sponsor, lead or project manager*] |  |
| 1. Project process    1. Project management framework    2. Project plan    3. Risks, actions, issues, decisions (RAID) log    4. Status reports: frequency, format | [*Project manager*] |  |
| 1. Project governance and roles and responsibilities    1. Steering committee, project teams    2. Meeting frequency    3. Roles and responsibilities | [*Project manager]* |  |
| 1. Wrap-up and next steps    1. Next meeting date/time    2. Assignments for follow-up | [*Project manager*] |  |