

Kickoff Meeting

by Sophia



WHAT'S COVERED

In this lesson, we'll discuss how a project manager organizes and conducts a project kickoff meeting:

1. Kickoff Meeting

It's important at the beginning of a project to make sure everyone has the same foundational knowledge. One method to accomplish this is with a **project kickoff** meeting, which can occur any time after a project team has been assembled.

Sometimes this meeting occurs as early as Phase 1, the project scoping phase. But it can also occur as late as Phase 3 when the management of the actual project begins. Each organization might do this differently.

Phase 1: Scope

Phase 2: Plan

Phase 3: Manage

No matter when it is held, the goal of the kickoff meeting will be to orient team members to the goals of the project and to introduce everyone to how the project will be managed. It will also be the time to introduce individual and team accountabilities.

The components of a kickoff meeting are as follows:

- *Orient team members.* Should this meeting occur after Phase 1, the project manager must discuss materials developed and information discovered in previous phases. This could include scope, risks, governance, schedule, and budget.
- *Establish team meeting rules.* It is important to discuss when team meetings will be held and what will be expected from members at each meeting.
- *Review processes.* Each project has specific processes that each team member should understand.

➔ **EXAMPLE** A project will have criterion methods for how decisions are made, how documentation is created and stored, and how to report on progress, schedule, or risks.

- *Set expectations.* The roles and responsibilities of key team members should be discussed and shared with the entire team. Expectations can be set using the RACI method so high-level activity expectations are noted whether a team member is responsible, accountable, consulted, or informed about the activity.

➔ **EXAMPLE** Team members should be expected to collaborate on the creation of project deliverables, as well as identifying issues and solutions. Each team member should be expected to attend and participate in team meetings. Each team member must report on their time, effort, and percent complete for their assigned tasks. Each member should be aware of how they should record this progress.

2. Effective Reporting

All team members must report on their time, effort, and percent complete for their assigned tasks.

- *Time reporting:* team members should know how to report their time spent during the day, whether it is by time sheets or other methods used by the organization.
- *Effort reporting:* team members should expect to report the actual effort in hours or days that they have spent on a task. They should be aware of how this impacts the project budget.

When team members need to spend more effort than estimated on a task, they should know how the project manager expects to be notified, and the process involved to receive approval for the extra effort.

3. Team Building

One aspect that should not be forgotten about the kickoff meeting is the opportunity for team building. Clear communication is always the key to team motivation, so the project manager should be prepared for the meeting, and ready to answer any questions from the team.

Team building exercises might be used during the kickoff meeting. To help orient team members about the responsibility of team leaders, role-playing activities could demonstrate how issues might be handled.

➔ **EXAMPLE** A team member might portray concern about the estimate for a deliverable. Members could then walk through the process to address this issue with their team lead, the project manager, and other members of the team.

The project manager should also note those members with specific areas of expertise, and how they might assist others. As always, the team should understand that open lines of communication and the free flow of information are expected.



SUMMARY

In this lesson, you learned the goal of a project **kickoff meeting**, what key components are part of any kickoff meeting, and how the meeting might be used for **team building**. **Effective reporting** methods and expectations establish the process for communicating to the project manager when tasks get off track.

Source: this work is adapted from sophia author jeff carroll.



TERMS TO KNOW

Project Kickoff

A meeting to acquaint team members with one another, inform team members about the project and project plan and establish overall accountabilities.