

KICKOFF MEETING GUIDANCE

Plan and conduct a kickoff meeting so everyone on the project understands what it is and how they're involved. Be sure to invite everyone involved in the project, including your project sponsor and project team members.



What do you want your project team to know?

1. **What and Why.** Share the “what” and “why” of this project. What problem are we trying to solve or what new thing are we creating, and why? For whom? What is the justification? What are the objectives and success criteria?
2. **Who.** Explain the “who.” Who is involved in this effort? You can use Part II of your Project Charter to explain which teams and people are involved, and their roles.
3. **When.** Explain the “when.” What is the schedule? What are the phases? When is the target go live date?
4. **How.** Explain the “how.” How are we all going to work together? What are the expectations? How will everyone communicate and collaborate? When will status meetings be held (if you know)? Will a group chat be created?
5. **Tools.** Demo the tools you will use. Show the file repository, where the project plan is and expectations for using/updating it, and so on.

How do you want your project team members to *feel* at the kickoff meeting?

This new project is likely intended to have impactful, beneficial, and purposeful outcomes. The kickoff meeting is a great opportunity to help your team members feel prepared, confident, excited, clear, part of a team, and so on. Consider what you might **say** and **do** so your project team feels ready to go.

EXAMPLES OF THINGS YOU CAN SAY AT YOUR KICKOFF MEETING:

1. "I really appreciate you all being here. Your time and expertise over the next 4 months will make this project a success."
2. "A goal of this kickoff meeting is that you leave with a clear sense of what we're doing and why it matters."
3. "I'm excited about this project because [say why]. Let me tell you more..."
4. "As we walk through the plan, I want to highlight that this is a collaborative effort. We'll shape it together as we go. Over the next 4 months, please let me know if you see anything that we can improve as we work on this."
5. "I want to make sure everyone knows that your questions, ideas, and feedback are always welcome throughout this project."

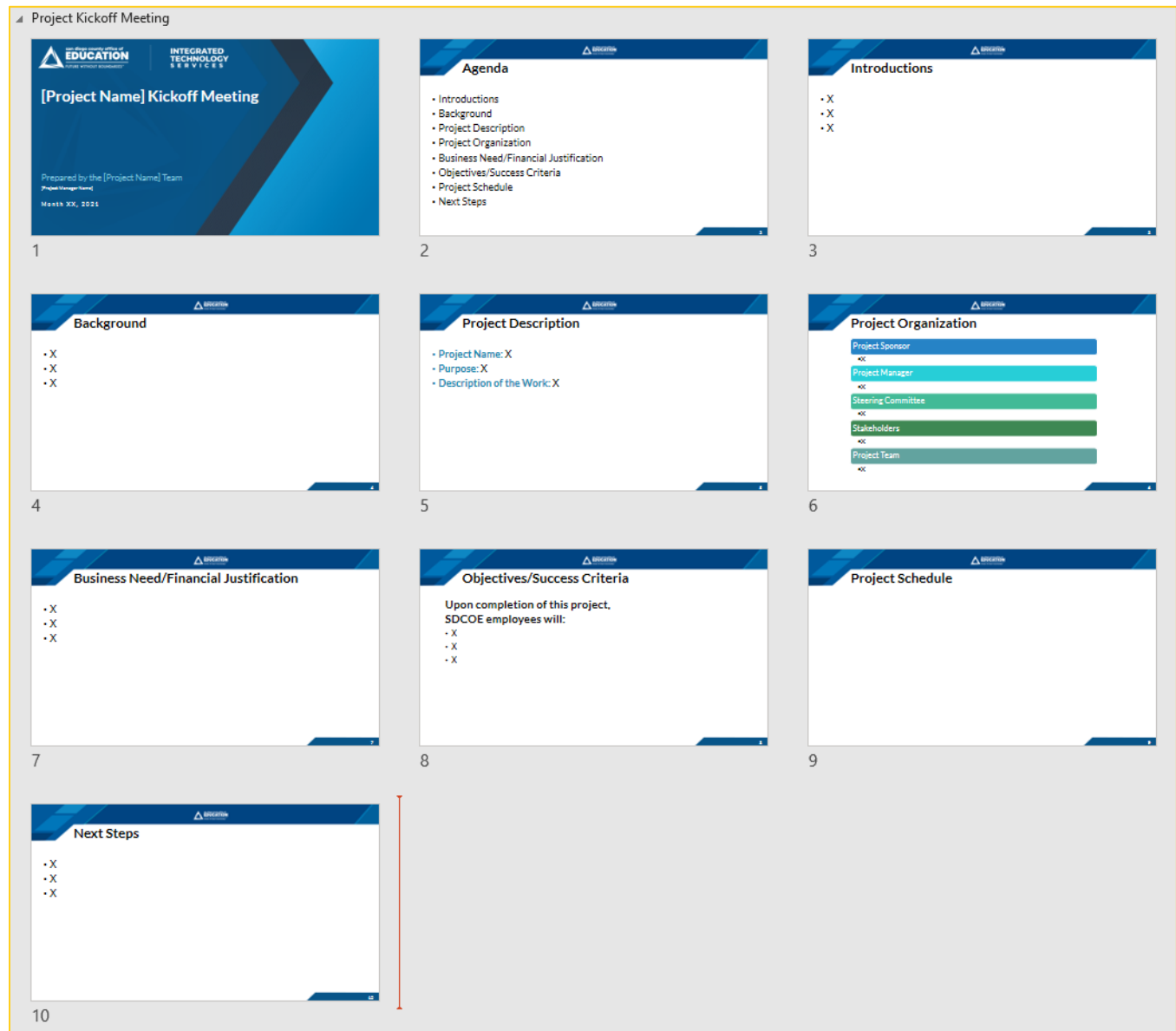
EXAMPLES OF THINGS YOU CAN DO AT YOUR KICKOFF MEETING:

1. Arrive early and greet people individually as they enter the room or call. Use names, smile, and thank them for being there.
2. Display a simple, welcoming slide as people join.
3. Start with a quick icebreaker or warm-up, like asking everyone to share one word they associate with the project or a related success they've seen.
4. Use visuals to tell the project story. A vision of the future, a calendar or simple timeline, or a user impact skit can energize the room more than bullets.
5. Pause and ask for reactions or input at key moments. Providing space for team members to participate makes the meeting feel inclusive and collaborative.
6. Celebrate early wins or work already done. "Getting this project conceptualized took effort, and your input helped make that happen."
7. End with a clear, motivating next step to leave everyone with a sense of momentum "You'll get the meeting summary by tomorrow, and we're now ready to officially get started. Our first status meeting will be in two weeks and I'll get the recurring meetings on our calendars."

Kickoff Meeting PowerPoint Format

If you will use a PowerPoint deck for your kickoff meeting, here is a format to consider as a starting point. TIP: Copy and paste content from your Project Charter to create your slides.

RECOMMENDED SLIDES



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|-------------------------------|---|--------------------------------|
| 1. Title Slide | 6. Project Organization
(Names of the entire project team) | 8. Objectives/Success Criteria |
| 2. Agenda | | 9. Project Schedule |
| 3. Introductions (if desired) | 7. Business Need/Financial
Justification, if needed | 10. Next Steps |
| 4. Background | | |
| 5. Project Description | | |

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