Kick-off Meetings

Just like QUALITY Good Project Management Practices start with an Internal Kick-Off Meeting

It is the **Project Managers** job to communicate:

- What is the team trying to accomplish?
- How the team is going to accomplish the objectives?
- What is the best means to achieve the projects objectives?
- That the goals and objectives are practical, logical, and measurable?
- That the team has the right resources to meet the projects goals and objectives?
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Project Management Process Flowchart

**Definition of Goals/Specifications**
- Define Goals
- Write Specifications
- Write Quality of Event

**Organizational Structure Set Up**
- Personal Assessment
- Personal Organization Set Up
- Responsibilities and Authority

**Set Team**
- Build Project Notebook
- Build Project History File

**External Customer Kick-Off Meeting**
- Customer Kick-Off Meeting

**Internal Kick-Off Meeting**
- Team Building
- Brainstorming

**PLAN**

**Planning the Project**
- List all Tasks/Define
- Create WBS
- Assign Resources and Duration

**Assign Tasks**

**Scheduling the Project**
- Milestone Chart
- Gantt Chart
- Build Network Diagram
- Calendar and Schedule

**Time Calculations**
- Pert
- CPM
- Logic Relationships

**Allocate Budget and Resources**
- Check and Schedule Costs
- Resource Loading
- Model for “Best Fit”
- Accounting Methods
- Cost Controls
- Leveling

**Final Evaluation**
- Go/No Go

**LAUNCH PROJECT**

**Managing the Project**
- Apply Communications
- Review Reports
- Hold Review Meetings

**Finishing the Project**
- Engage all Exit Criteria
- Compile all History
- Review TGR/TGW

**Congratulate the Team**

**IMPLEMENT**

**Define Goals/Specifications**
Define Goals
Write Specifications
Write Quality of Event
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How Do We Get There?

After the organization has:
- Identified who the project manager will be, and
- Organized all of your people into cross-functional teams

Then:
- Hold an internal kick-off meeting to:

  - Ensure an effective hand-off from marketing, production, sales or management to the assigned project manager
  - Ensure the defined project is consistent with the customers’ real need
  - Organize the project
  - Initiate the project team building process
  - Generate a timing and budget plan

**Internal kick-off meeting objectives:**
**Project hand-off:**
- Communicate that the project manager is the sole individual responsible for ensuring that the project is planned, executed and managed in accordance with the customer's requirements/expectations.

- Ensure the customer's requirements/expectations do not exceed what is described in the contract documents or project specifications

- In many cases, the project manager becomes a part of the project process well after project inception, adding to the importance of this hand-off step.

**Organizing the project:**
- Once the project manager understands the objectives and scope of work, he/she must ensure the necessary functional skills and resources will be made available to the project.

- The project manager must ensure that a responsible representative of each functional group is available for participation in the project kick-off process.

- A project organization should be established.
  - Define the roles and responsibilities of the project manager
  - Define the roles and responsibilities of the project team members

**Initiating the team building process:**
- Team building is a continuous process which starts at project kick-off and continues throughout the project

- The project manager is challenged with integrating a group of diverse individuals into a productive/cohesive unit that has accepted the common goal of ensuring project success

- The importance of the project should be defined and a detailed discussion of the project should occur
• Indicate that each team member will be responsible for providing the technical detail necessary to support their efforts in the project plan

**Initial project plan:**

• Project manager reviews the contract or design specifications with the team members to ensure their total understanding of the requirements

• Project objectives should be clarified and open issues, loose ends, vagueness or areas of confusion corrected

• Once the project objectives are clearly understood, the project team can develop the strategy for achieving the project objectives

• Given a clear definition of the project objectives and an acceptable strategic approach being established, the Work Breakdown Structure (WBS) and Responsibility Matrix are developed.

• Once top-down planning has been defined and the specific tasks identified that must be executed, bottom-up detail planning can be initiated

**Detail project plan preparation:**

• Identify major project milestones

• Develop a Gantt chart of the project

• Determine the project's critical path

• Determine each task's expected completion date, and compare it to the required completion date (milestone)
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- Compress the schedule as necessary to ensure the expected completion date and required completion date are the same:
  - Schedule compression is accomplished by adding resources to the task, modifying the numbers of hours worked, etc.
  - As a last resort, scope of work reduction can be recommended to the customer

- Resource leveling of the project plan occurs

**Prepare for the external customer kick-off meeting:**

- Project manager and team members should establish an effective game plan for the external customer kick-off meeting.

- Define the purpose of the external customer kick-off meeting.

- Prepare an agenda for the meeting, and if possible, send it in advance to the customer for their review.
  - In advance, identify to the customer the specific team members who will attend the meeting.

**External Kick-Off Meeting Objectives**

Second step:

- Hold an external kick-off meeting with the customer to:
  - **Gain customer confidence in the team**
  - **Clarify the project requirements**
  - **Present the project plan**
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- Acquire customer commitment
- Formalize a working relationship

External kick-off meeting objectives

Gain customer confidence in the team:

- Ensure to the customer that the project manager and the project team understand the detailed requirements of the project and are prepared to meet the obligations.

- The customer must be convinced that the project manager knows what he/she is doing, has the authority to carry out the necessary effort and is in control of the project and the project team

- Introduce the project team members and identify their roles and responsibilities on the project team

- The customer's team should also be introduced

- Define the communication channels for ALL future relations between the customer's organization and the key members of the project team

Clarify the project requirements:

- The project manager performs a detailed review of the contract or specifications paying particular attention to the scope of work, project deliverables, working procedures, billing requirements, etc.

- Any loose ends, vagueness or open issues in the project documents should be presented to the customer for resolution
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- If the customer is known to have perceptions/expectations that are not included in the project documentation, but which could surface at a later time and adversely affect the project, they should be identified and resolved. If resolution cannot be achieved during the initial customer meeting, then the customer should be required to acknowledge responsibility and a commitment to affect resolution by a specific date should be obtained.

**Present the project plan:**

- Present the project plan to the customer as part of the process of gaining customer confidence and trust, and to ensure that the client recognizes his/her project execution obligations and responsibilities.

- The project manager must obtain the customer's commitment to the plan. Customer "buy-in", a statement of their willingness to cooperate in the effort to achieve the desired results, is crucial to the success of the project.

- In general, it is not necessary to present planning elements such as the WBS, responsibility matrix, resource plan and budget plan.

- A detailed Gantt chart identifying major milestones, project deliverables, customer required deliverables for your efforts, etc., must be presented and reviewed in detail.

**Acquire customer commitment:**

- In addition to gaining customer confidence that the plan is consistent with project requirements, it is also necessary to present the relevant elements of the project plan to get their commitment.
• The planning axiom - 'a plan is not a plan unless it has commitment' – not only relates to the commitment of the project team and the organization's functional management, but applies equally to the customer.

• The customer must be convinced that project execution is intimately tied to the execution of their defined functions, and that their commitment to the plan is necessary for project success.

• Failure to meet the scheduled completion dates for their efforts could jeopardize the required project completion date.

**Formalize a working relationship:**

• The communication channels and reporting requirements should be identified, the day-to-day operating procedures discussed and any meeting requirements defined and scheduled.

• It is imperative that the project manager be acknowledged and accepted as the customer's single point of contact throughout the project period.

• Understand that the role of the project manager as the customer's single point of contact can easily become an impossible task. The numerous interfaces, areas of discussion, meetings, functional activities, reporting requirements, and multiple work locations, inherent in a large or complex project, can cause the project manager to become a communications bottleneck. To avoid this problem, the project manager will have to assign certain contact responsibilities to specific project team members. By starting as the acknowledged point of contact, the project manager can then decide which specific contacts will be delegated to a team member, and he/she can
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- limit or control the responsibility included in each delegated role.

- The project manager and customer should agree on a project review meeting schedule that will ensure continued cooperation and progress and will enhance the working relationship.
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Kick-off Meeting Summary

- Internal Kick-Off Meeting
- External Kick-Off Meeting

**Internal kick-off meeting:**
- Project responsibility is transferred
- Project effort and project team(s) are organized
- Team building process is started
- Initial project plan is developed
- Customer meeting game plan is established

**External customer kick-off meeting:**
- Gain customer confidence in the team
- Clarify the project requirements
- Present the project plan
- Acquire customer commitment
- Formalize a working relationship
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Team Dynamics: Managing Personalities
Kick-off Meetings

**Cross-functional Teams**

Cross-functional teams eliminate the barriers between departments
Effective Cross-Functional Team Members ......

Prepare for the Meeting:
Review the meeting agenda ahead of time and accomplish all the action items. Gather information on all important issues as outlined on the project plan. Have a purpose for attending the meeting.

Help Develop Ideas:
Offer facts and ideas, use logic and data to support ideas. Request opposing views. Seek to understand the problem.

Behave Professionally toward Others:
Seek to understand reasoning behind opposing viewpoints. Practice active listening. Actively develop and improve upon the ideas of others.

Remain Objective:
Concerned with what is right, not who is right. Swayed by information not emotions.

Are Self Managing during the Meeting:
Arrive on time. Help the meeting stay on track. Show up prepared to contribute. Remain focused on the topic of discussion.
Exemplary Project Meeting Rules

1. Do not criticize, condemn or complain (3 C's)
2. No arguing
3. Do not interrupt other team members
4. Listen to the ideas of other team members
5. Team members must complete action item assignments
6. The project manager must keep the meeting on track
7. No one can dominate the meeting
8. Focus on "what" is right, not "who" is right
9. Everyone must contribute
10. Meetings start on time
11. Meetings end on time (unless the team votes to continue)
12. Every team member's first loyalty is to the team (no hidden agendas)
13. Show respect for every team member
Use the Agenda to Focus on the Project Management Process

**Have a clearly defined purpose for the Meeting:**
The meeting agenda should support the purpose of the meeting. The purpose of the meeting should support the detail project plan.

**Prepare the Agenda:**
The agenda should include topics as defined in the detailed project plan (tasks), who will cover them, new tools and time to cover each topic.

**Have the Right People at the Meeting:**
The team(s) must have the right support and information available on time to make progress. If key people are not present, the meeting will not be productive.

**Arrange for the Meeting:**
Go through a meeting checklist in advance. Make sure the agenda addresses the project plan tasks for the current period of time.