## Get Your Project off to a Great Start – How to Run an Outstanding Kickoff Meeting

I'm sure most of you have been in a kickoff meeting. You know, the very first meeting at the start of the project, the first one after you signed the contract? Ah yes, it's coming back to you now; that odd mix of enthusiasm, awkward bonhomie and a profound desire to be anywhere else!

Well, I'm here to tell you that kickoff meetings serve several important functions on any project. And getting the ball rolling on project work is not the most important. Sure, it's a good idea to cover lots of project related materials in a kickoff meeting, but the real function of this meeting has nothing to do with project work or next steps. It is the first time you and your team get to show the client *how* you work. It's amazing how much clients remember about that first meeting. I've had a client tell me how well she remembers my look of surprise when I discovered the kickoff meeting on our project would have 25 attendees, this on the day of the meeting.

Some basic rules can help you make a kickoff meeting a great start to a project, rather than a sign of bad times to come.

1. **Meet with your client before the kickoff meeting to talk about your plans**
   Make sure to set up a good block of time at least a week before the kickoff meeting to sit down with your primary client contact for the pre-kickoff kickoff meeting. The goals of this meeting are to make sure your client understands what you hope to accomplish in the kickoff and to make sure you understand what he hopes to accomplish.

   What matters is that each of you knows what the other person expects out of the meeting. You can draft an agenda at this meeting, though of course, you'll have to run it by your team (see item number 5). And your client will surely run the agenda by his team. As long as the agenda is agreed to and distributed a day or two before the kickoff, you'll be fine.

2. **Find out who's coming**
   This seems easy, right? After all, the attendees should include your client, your team and maybe a note taker and moderator. That's what you think. Remember, the kickoff meeting is as much a meet and greet, show off the new consultant event, as it is a functional meeting. That means your client may want to bring various "stakeholders," people with some kind of interest in your project. He may also want to bring technical experts, folks who can tell him if your technical experts know what they're talking about. It's alright if all these folks come, since the meeting isn't supposed to be a working session, but it's not so great if all these people show up without warning. Set some time aside in the prekickoff client meeting (see item number 1 above) to talk about who should attend. You can talk about your team and the client can discuss his team. This is a great time to learn about politics and rivalries in the client's company. Once you know who's coming, who matters and which stakeholders hate each other, you can get back to your kickoff planning session.

3. **Send out invites**
   Make sure to set the meeting time and send out invites at least a week before the meeting, okay, three days, but no less! This is an important enough meeting that people may be willing to shift other meetings around in order to attend, but remember, first impressions matter. Let everyone know the date, location and time of the meeting. Oh, promising food and drink is a great way to make sure everyone attends. And of course, don't forget to book the room.

4. **Pre-meeting preparations - logistics**
   Remember, the kickoff is really a dog and pony show, so being prepared is very important. Get someone else to handle food and drink, if possible. There should always be coffee, tea and water available; soda is also nice. If the meeting starts at 9:00 am, then croissants,

donuts, bagels etc. are in order. Actually, if the meeting starts anytime before 11:30, breakfast food is a good idea. Figure out what you are going to do for lunch in advance. If it's catered, great, if you're ordering from the local deli, make sure you have lots of menus available. And make sure people order their food early enough that they actually get to eat it before 2:00 pm. Oh, hot cookies for a mid-afternoon snack; your client will love you forever! Oh, I almost forgot. Make sure to find out about any food preferences, like no meat or no dairy in advance. You don't want to order a sausage pizza only to discover your clients are members of a vegan, lactose free cult.

5. **Pre-meeting preparations – your team**
   Always, always, always have a pre-kickoff meeting with your team. Your team is employees, contractors, and interns, anyone who works for you for the duration of the project. Have the team prep meeting after you meet with the client. That way, you can report to your team on all the client "dirt" and things to watch out for. There's nothing worse than having one of your team members commit a major faux paux in the first client meeting.

   You should also go over the agenda and make sure everyone is clear on their role and responsibilities. Make sure everyone knows who will lead what sections of the meeting, who will take notes and who will moderate the session.

6. **Teach, teach, and teach some more.**
   You will always know more than your client about your development approach. That means you need to explain your approach to the client. Avoid jargon! Don't use hip, industry insider phrases. Make sure that your client understands your language as well as you do. Distributing a glossary before the meeting is a great way to speed up the training process. Remember, your client hired you for your expertise, but that means he's admitted he doesn't know as much as you do. This puts him in a vulnerable and exposed position. Not good for him and not good for you. You want him to feel comfortable and informed. Don't wow him with your knowledge; just share what you know. Graphics and examples are always helpful. For example, if you client has hired to you to design a website, use different websites to explain topics like usability and accessibility.

   You need to be a good student as well as a good teacher. Odds are, you don't know much about your client's business. Even if you do have a background in his field, letting your client give you some industry lessons is a good way to make him feel comfortable. For example, if your client works in the fish processing business, you'll want to do some background research on fishing. Oh, and don't mention recent declines in the cod market at the kickoff meeting!

7. **Presentation**
   It's always good to look nice. No, no, I don't mean wear a business suit to your meeting. The key is to dress appropriately. If your client is an investment bank, wear business suits or office casual. If your client runs a plant nursery, wear jeans. If you're not sure, ask your client. And of course, this appropriate dress code applies to your team as well. Shorts, a ratty tee shirt and flip-flops are never appropriate for a kickoff meeting.

8. **Seating**
   Seems silly, but you should think about who sits where in advance. You don't want all the contributors in one corner and all the quiet, shy folks in another. Don't let all the client representatives sit on one side of the table and your team on the other. This is not a football match or a debate; your team needs to get to know the client team and stakeholders. Mix it up!

9. **Listen**
   Let the client talk. The kickoff meeting is a chance for the client to go over their problems, again and again. Don't worry; they've already hired you to make their problems go away. They think you're great. They just have to show their boss that the problem is understood and you are the team to fix it.

10. **Take Notes**
    You'll be sorry if you don't. Make sure someone is assigned the note taker role. Best if it's someone brought in just to take notes. Even if you have to take notes yourself, don't skip this crucial function. All your look good efforts will be for naught if you forget everything that was agreed to because you didn't write it down.

11. **Distribute Notes and Next Steps**
    The work isn't over when the meeting is over. Send out the notes quickly and make sure all next steps are called out clearly.

    Follow these simple steps and not only will your kickoff be a huge success, your client will mention it in when he recommends you to all his friends at the end of the project.