



KICKOFF PLANNING

PROJECT NAME:

KICKOFF DATE:

Invitees

1. Who are the key stakeholders who must attend the kickoff meeting (internal and external)?
2. Which team members should be informed but not required to attend — and how will they be briefed?
3. How do you balance the need for inclusivity with the risk of having “too many” people at the table?
4. What is the best way to engage subcontractors or partners early in the kickoff process?
5. Who should lead the meeting, and who should take ownership of documenting and tracking outcomes?

Scope of Work

1. What are the main objectives and deliverables as defined in the SOW?
2. Are there any areas of ambiguity or assumptions that need clarification?
3. What out-of-scope items should be explicitly stated to prevent future disputes?
4. How can the team ensure all parties interpret the SOW consistently?
5. What performance metrics or success criteria are tied to the scope?



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Tasks and Deliverables

1. What are the key milestones and deliverables that must be tracked from kickoff onward?
2. How will progress toward deliverables be monitored and reported?
3. Are task dependencies or sequencing issues already identifiable?
4. What tools (e.g., project schedule, WBS, dashboard) will support task management?
5. How should deliverables be reviewed and approved by the client?

Budget

1. What budget elements need to be reviewed or clarified during kickoff?
2. How do you ensure everyone understands funding limits, cost controls, and billing procedures?
3. What early spending risks or cost overruns could occur, and how can they be mitigated?
4. How will changes in scope or schedule affect the budget, and who approves adjustments?
5. What financial documentation or reporting requirements must be established from day one?



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Roles and Responsibilities

1. How will project roles be defined, clarified, and communicated during kickoff?
2. Are there any overlapping responsibilities or unclear authority lines?
3. What decision-making structure will the project follow (e.g., RACI, steering committee)?
4. How will accountability be reinforced throughout the project?
5. How can role confusion or turnover be mitigated early on?

Communication Plan

1. What communication channels and cadence (meetings, reports, dashboards) are most effective for this project?
2. How will you ensure consistent messaging across partners and subcontractors?
3. Who is responsible for communicating with the client or sponsor — and under what circumstances?
4. How will decisions and action items be documented and shared after meetings?
5. What escalation path should be used when issues arise?



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Risk

1. What are the top 3–5 risks that could affect project success at this early stage?
2. Which risks are within the team's control, and which are external dependencies?
3. How can risks be tracked and reviewed throughout the project lifecycle?
4. Who owns risk management — and how is accountability defined?
5. What early warning signs should the team monitor for schedule or performance issues?

Compliance

1. What contractual, legal, or regulatory requirements must the team comply with?
2. How will compliance documentation (training, certifications, audits) be maintained?
3. What steps should be taken during kickoff to ensure data privacy and security standards are met?
4. Who is responsible for ensuring subcontractors or partners meet compliance obligations?
5. How will compliance requirements be communicated to all team members?



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Next Steps

1. What specific actions must occur immediately following the kickoff meeting?
2. How will decisions made during kickoff be documented and shared?
3. What early deadlines or setup tasks (e.g., system access, data collection, logistics) must be prioritized?
4. How will follow-up meetings or check-ins be structured?
5. What does a “successful kickoff” look like for this project?

Write your own