Pulling off the Ultimate Kickoff Meeting for an Onboarding Project: A Complete Guide

rocketlane

A new project is a lot like setting out to sea. If all goes well, you could be cruising away - right on course, making all the right stops. Or, you could be in for a rocky ride - in survival mode, tossing and turning with little sense of direction. A lot depends on who you're making the journey with - where you want to go, the way you want to get there, and how soon you want to do that.

Most projects, unfortunately, see a lot of the initial planning thrown to the wind - with enthusiasm giving way to disgruntlement and promises ending in disappointment. What could set the tone for this journey is your version of a cruise launch - the project kickoff meeting. Done right, it's an opportunity to establish common goals, build alignment on the purpose of the project, get all hands on deck, and everyone excited for the way ahead. It is your chance to get the entire team on the right course from the start - an exercise in alignment, understanding, and lots of trust-building.

So, how can you run an exciting, effective, and inspiring project kickoff meeting? In this 2-part series, we tell you how you can run the ultimate kickoff meeting - from planning and designing it, to running it like a pro - and some pro-tips to keep in mind at every stage.

In this document, we'll cover:

Part 1:

Planning and prepping for the project kickoff

Part 2:

Running the project kickoff meeting

Part 1:

Planning and prepping

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A kickoff meeting is only as good as the planning and preparation that has gone into it. Here are eight steps that can set you on the right track:

Step 1: Setting up your project team

First things first, identify the team that's going to work on the project with the customer. For a typical onboarding project, based on the size and maturity of your team, here are the functions that you would need to integrate: onboarding, delivery, customer success, and the implementation team.

Step 2: Handoff from sales and engineering

Get a handover of the project scope, Statement Of Work, key stakeholders, and any other relevant information. Below is the minimum information you need from each function at this stage.

From sales:

- Goals & objectives
- Stated functional requirements
- Value/ROI metrics as highlighted to the customer

From sales engineering:

- New features or functionalities
- Known constraints
- Past issues

Step 3: Customer research

While talking to your sales team is a good start, go that extra step to understand the industry, the key stakeholders, their background, their earlier challenges, history, and expectations, etc.

Step 4: Mapping the customer team team

Based on your discussions and research, map out the key stakeholders at the customer end. Create a stakeholder mapping document that identifies the project sponsor or champion, business owner/lead, project manager, IT manager, information security lead, and the technical architect at their end.

Here is a sample template you can use:

Person	Title	Role (DACI) Driver/Approver/ Contributor/Informed)	Responsibility	Notes

Step 5: An internal pre-kickoff meeting

This is the most important step to ensure that your team feels prepared, confident, and bought in before meeting with the clients. This way, you have time to iron out the kinks, hear and address any concerns from your team, and work those into your kickoff agenda.

Make sure you involve team members in charge of onboarding, customer success, project management, and the implementation team. If it's a high stake or complex project, you could also include your sales account executives or sales engineering to help address any concerns your team might have)

While it's a good idea to keep this meeting flexible, make sure it covers the eight aspects mentioned below:

1. Client: Based on your initial research, take a few minutes to run through your client's background and products, the project history, key executives, and their expectations.

2. Scope and deliverables: While the scope and deliverables would have been agreed upon in the proposal, break this down into specifics for your team. The scope should contain key milestones and features. Do this right in the beginning so team members can bring possible concerns about budgets and timelines if there are any.

3. Risks and issues: Use this time to discuss potential risks and issues that you want to highlight in your risk management plan in the actual kickoff meeting with the client.

4. Approach: Discuss your project management tools, any tech bottlenecks, etc.

5. Roles and responsibilities: Elaborate on roles and responsibilities. You could break the project scope into parts or phases and follow the RACI framework (Responsible, Accountable, Consulted, Informed) to assign responsibilities.

6. Assets: Ascertain what you would need from the clients to get started. This could include team data, questionnaires, assets, login credentials, approvals, etc.

7. The kickoff meeting: Use this time to get inputs to define the agenda of the impending project kickoff meeting. For this, make sure that you:

- Communicate the goals and priorities of the customer
- Build consensus on the scope, deliverables, approach, and timelines

Step 6: The kickoff agenda

Based on your research and internal conversations, next comes the most important part of this phase. Here is a sample agenda for you to follow with the time assigned for each section

1. Introductions - 10 min
2. Goals, ROI, priorities - 30 min
3. Blueprint walkthrough - 20 min
4. Rules of engagement - Processes, Tools, Risks - 20 min
5. Key personnel and steering committee -10 min
6. Resource commitments, assets, and approvals - 10 min
7. Next steps and Q&A - 15 min

Step 7: Scheduling and invites

Send out invites to the project team and key stakeholders at the client with the agenda. Make sure that the body of the email calls out who needs to attend, and their role in the meeting. Highlight the setting up of the steering committee in the project kickoff agenda and the role to be played by the executive sponsor or the project champion here. Ensure the client understands that the kickoff will not happen without these key team members joining the call.

We recommend following this up with a call or visit to your project champion to accommodate any feedback, or understand any concerns. This is also a great chance to probe for any apprehensions or talk about challenges they have earlier faced.

- **Tip 1:** A good way to set expectations and avoid unpleasant surprises or awkward conversations in the larger group setting is to send out pre-read attachments based on the current understanding of the goals, ROI, broad scope, timelines, and deliverables.
- **Tip 2:** Remember to keep your internal team looped in on any major changes at this stage.

Step 8: Identifying value delivery metrics for the kickoff

A great way to jumpstart your kickoff, this step helps the customer team see the actual value in the project - as a whole and through its multiple pieces. Your sales team's pitch handoff is no doubt a good place to start, but for more on value realization, we have a detailed article on Value Metrics.

We highly recommend that you work with the customer to identify the metrics and ROI to measure against each section of the project. The customer needs to highlight and present this at the kickoff so all teams know why this project is important and the value it brings.

Whether it is increased leads, better sales efficiency, automation of work, increased employee satisfaction, higher customer NPS, make sure that you tie this to an actual value.

Before D-Day

Once you have confirmed the date of the kickoff, it's time to work on the details for the day's agenda. Here are some tips to keep in mind as you finalize the blueprint and timelines to be shared:

1. The kickoff meeting is all about setting the groundwork in place aligned to the larger vision and goals. It's not the time to make detailed scoping plans - this is something that is best done after the kickoff.

2. The customer must work with you to define and describe the goals for the project, so they can present it to their team in the kickoff meeting. For each customer team, make sure that you identify the ROI for their individual functions.

3. We recommend speaking to your POC to find out about any other ongoing projects and understanding the priority of these projects. This would help you plan better timelines in the kickoff meeting and save discussion time in the meeting.

Part 2:

Running the project kickoff meeting

Low adoption, delayed implementation, ghosting customers, botched implementations, de-prioritization, and customer churn - these are just some of the stops on a project that has veered off course. Speak to any seasoned project experts and onboarding specialists - and they'll tell you how the right start can make all the difference in their projects. The easiest way to avoid them is a thoughtfully planned and deftly implemented project kickoff. While the stated purpose of a client kickoff meeting is to introduce everyone and get on the same page, the unstated purpose is to

- Demonstrate value for all aspects of the customer team,
- Build consensus on what success for the project looks like, and
- Establish an understanding of how you will work together

In part one of this two-part series, we discussed everything you need to plan a successful project kickoff. In this second and closing piece, we detail out all the aspects of running the ultimate kickoff. Let's get started.

A Comprehensive Onboarding Kickoff Agenda

A successful kickoff agenda should leave your customer and your team confident and bought in on everything - from a shared understanding of the vision to the nitty-gritty details, like who signs off on deliverables. Here are the aspects of such a meeting:

1. Introductions - 10 min
2. Goals, ROI, priorities - 30 min
3. Blueprint walkthrough - 20 min
4. Rules of engagement - Processes, Tools, Risks - 20 min
5. Key personnel and steering committee -10 min
6. Resource commitments, assets, and approvals - 10 min
7. Next steps and Q&A - 15 min

Let's look at each of these in detail:

1. Introductions

A good way to set the stage is by providing some initial context and outlining the client's high-level goals. Next, introduce your key team members. This is the time to highlight your team's diverse skills and relevant experience. If your team has worked on similar projects before, make sure to weave this into the conversation. It's a great idea to let people speak for themselves, but we recommend prepping them beforehand with some key talking points.

2. Goals, ROI, priorities

Aligning the teams clearly on the top goals of implementation goes a long way in establishing a framework for all subsequent decisions made in the project. It's important to remember that project team members are more invested when they can understand how their work is impacting their company and their individual functions.

To build this investment, it is important to help the entire customer team see value and ROI - for the company and individual functions/teams. Quite obviously, this is more effective when it comes from their own management/leadership.

Make sure that the project champion and sponsor articulate the goals and the value for each function and team. The best way for this is for them to demonstrate and establish the quantitative value unlocked by hitting the project goals and metrics.

3. Blueprint walkthrough

While a kickoff meeting isn't about the specifics of task management, showcasing the project blueprint in an easily consumable fashion to the whole team shows both - your commitment to delivery and your attention to detail building confidence and trust.

This also helps drive home the point that "3 months to going live" is not wishful thinking, but is driven by a clear methodology that needs their involvement. To start off, keep the discussion high-level and cover the broader schedule, milestones, and any key decision-making stages.

Tip: At this stage, we recommend that you keep open to some changes to the original plan.

Now is a good time to set expectations in terms of not just delivery but also your team's availability and response time.

4. Rules of engagement - Processes, Tools, Risks

Use this time to discuss how you will track and communicate progress and document/resolve issues. It's important to see that you don't overwhelm your clients at this stage - a new project is daunting as it is without having to worry about managing multiple platforms and tools. We highly recommend using a platform that combines collaboration, tracking, reporting, and communication.

You can showcase your approach to project management, and how you identify with scenarios where you are blocked or the project timelines are in danger. Since the steering meeting is set up, the time is right to understand how both parties will deal with change requests or increases to the scope.

While it's a good opportunity to discuss risks and issues, steer the conversation to understand how they've dealt with these scenarios in the past. This will help you understand their response to risk and where you should be most mindful throughout the project's lifecycle.

5. Key personnel and steering Committee

Key personnel

From both ends, identify and discuss the key players and decision-makers in the project. Discuss the process and personnel for signing off deliverables. For decision-making, the DACI (Driver, Approver, Contributor, Informed) framework is a good place to start. You could identify the key responsibilities for activities planned for the first week after the kickoff using this framework to drive home this understanding.

While a DACI framework is helpful to assign responsibilities and decision-making, you need a higher-level committee to steer the project at multiple points in the journey.

Steering committee

Use the kickoff meeting to ensure that top executives and senior leaders commit themselves to be part of the steering committee. The job of the committee is to be able to evaluate progress, validate key decisions made and value delivery, and re-align the team as may be needed.

Securing time from top executives and leaders is hard, but you need to get them to commit to a schedule for the steering committee meetings. Seeing their leaders commit their time in advance helps build ownership and pushes the project team towards accomplishing their goals on time.

6. Resources, Assets, and Approvals

Based on the blueprint and the methodology discussed, this is the time to get the customer team leaders to commit to getting their people as needed by the blueprint.

Make sure you have everything you need to get started (assets, credentials, approvals, etc.). Discuss how these will be saved, shared, and/or used throughout the project.

7. Next steps and Q&A

At the end of your kickoff, leave some time for final questions, and then explain what's going to happen next - the scoping and requirements meeting. Make sure you block the time for this - for detailing the project phases, key deliverables, phase-wise decision-makers, etc.

Pro-tip: Make sure you have someone taking notes for this meeting. You could use your communication or project management tool for documenting and sharing the kickoff meeting - it's a great way to demonstrate your focus on documentation and communication, besides being an easy way to build familiarity with the project tools you use.

Tips for a perfect kickoff meeting

While the nitty-gritty details are important, the perfect kickoff meeting is a delicate balance between pitching and planning. It's not just important what you say, but how you say it can make all the difference. Here are a few best practices to help you hit the right note:

1. Take your time with introductions: When you talk about your client, show that you have gone the extra mile to learn more about them. When you talk about your team, make sure that key stakeholders feel heard, recognized, and involved.

2. Demonstrate authority and show value: Based on the client's past challenges, talk about the value your service adds - while providing the assurance that you've solved for it already.

3. Get a simple project mission statement: This is optional, but we've found this to be very effective to build alignment. Using a whiteboarding or post-it exercise, get the two teams to come up with a statement that's short, clear, and motivating.

4. Show them how it's done: It's a good idea to weave in a short demo or walkthrough of your project management tool - especially if any standout features help ease the process.

5. Show them a new way: A common mistake most teams make is trying to map an old process at the customer end with their new solution. It's important to critically look at arbitrary requirements that customers might bring up in these discussions. Probe deeper to understand if these are actually needed to reach the project goals or just a hangover of their previous experiences.

6. Immediate support and follow-up: To ensure that things don't lose momentum after the kickoff, agree on an immediate timeline within the next 2-3 days to follow up - for the scoping meeting, and to address any concerns they have with processes or tools.

7. Keep time: The ideal kickoff meeting is no longer than three hours. Plan your agenda to make sure that it doesn't overwhelm the participants or appear stretched.

After the project kickoff meeting

Documentation

Send a documented record or minutes of the meeting to the client after the kickoff call to ensure both parties are clear about what to expect next. Include the key decision-makers and ensure their next steps are detailed. Make sure the kickoff meeting is documented in the project management tool as well.

Email - to open up communication

It's possible that the client team wasn't comfortable raising questions in a group setting. By sending out an email, you open up this line of communication to address any questions, concerns, or just get some feedback.

Schedule the scoping meeting

Follow up right after to set the date for the scoping meeting where you will define the project phases, key personnel, deliverables, and timelines.

Over to you

While it's tempting to reduce kickoff events to another item on a long onboarding checklist, they have the power to excite, engage, and inspire. We hope this post helps you design and execute a kickoff meeting that gets all hands on deck and your project on the right course.

We hope these steps help you run a kick-ass kickoff meeting. While it might seem like you have your plate full, doing this right sets you off on a much smoother sail ahead. Are there any tips and tricks that we may have missed out on? We'd love to hear from you - what do you think is the secret sauce to a successful kickoff? Let us know in the comments below!