Lucid Facilitator's Guide
THE ESSENTIAL PROJECT KICKOFF MEETING

Every project benefits from a kickoff, but not every project warrants a full-day facilitated workshop.

This simple kickoff meeting provides a fast, engaging, and effective format for ensuring everyone understands the project goals and logistics, and actively takes responsibility for preventing issues.

Best For

Straight-forward or smaller projects

10 or fewer people

Engaging passive stakeholders

Contents

OVERVIEW

This kickoff meeting takes the team on a journey, helping them form a strong mutual commitment to the project's success.

This Facilitator's Guide provides practical step-by-step guidance for running the meeting, including specific instructions for those using the Lucid Meetings platform.

For more information about how we developed this process, our experiences with it, and the techniques used to lead the discussions, read the accompanying post on our blog.

The Agenda

1. **Introductions**
2. **Discuss: When we succeed!**
3. **Project Logisitics**
4. **Discuss: Why might this project fail?**
5. **Review & Confirm Next Steps**

PREPARING FOR THE KICKOFF

A good kickoff will get the team talking about **new ideas**, sharing concerns, and **create the momentum** needed to get the work going.

But you do NOT want people to be surprised by the project goals, scope, or the role they're expected to fill. People caught off-guard become defensive and cannot participate effectively in the meeting.

This does not mean you can or should try to know everything about the project in advance. That's impossible and counterproductive. It does mean **you need to prepare** and share what you do know in advance of the meeting. Here's how.

Rule #1: No surprises!

Prepare Information about the Project Logistics

You can use your existing project documentation, adapt the Power Point presentation included with the meeting template, or type information directly into the agenda. The Power Point includes slides for those items we've found most important in our projects.

1. Scope
The Scope covers what the project includes, and what it does not.

2. Key Dates
Share key dates, like the desired completion date, promotional events, and other dates that will drive the project schedule.

3. Who Does What
We use a variation on the RACI chart. It's a very efficient and clear way to show how each person's roles and responsibilities will change throughout the project.

4. Project Tracking or Systems of Record
Document where people will post project updates, assets, and track progress. If you're using online systems, include links and login instructions that everyone can refer to after the meeting.

5. Communications
Explain how the team will ask questions, share progress, and keep in touch during the project. For most teams, this is a combination of email, meetings, short calls, and chat.

Add this information to the agenda. You want the team to see and read the project details before the meeting , so you don't have to spend precious meeting time reading out loud.

PRO-TIP:
HOLD A PRE-MEETING WITH THE PROJECT SPONSOR

Once you have the project logistics information drafted, meet with the project sponsor to go over the agenda, the invitation list, and to review the logistics material you've prepared.

Questions to ask the sponsor before the kickoff:

- Why is this project important to the organization?
- Who do we need at the kickoff to make the project a success?
- Will you be actively involved in the project? If not, who on the team has the authority to make decisions in your absence?
- Who there might be threatened or opposed to this project?
- During the kickoff, what questions do you anticipate the team will have? What misconceptions will we need to correct?

The Sponsor Starts the Kickoff

Ask your sponsor to start the meeting **by sharing why the project is important** with the team.

They don't need to create a presentation - **just a short statement** of the project goals and why it matters to the organization. This **sets the tone of the meeting** and helps the team understand the sponsor's role in supporting the project's success.

Schedule the Meeting

Schedule the kickoff **at least 48 hours** and **ideally 1 week in advance**.

Make sure reminders are turned on, so people will get a reminder the morning of the meeting and 10 minutes before the meeting starts.

This meeting runs between 45 minutes and 2 hours, depending on these factors:

The Complexity of the Project

Simple projects require very little discussion, so the meeting goes quickly. Complex or unclear projects require more discussion and more time.

For more complex projects,
add more time to agenda items 2, 3, and 4.

The Number of Participants

Each person is expected to actively respond to questions and contribute during this meeting. **Plan 10 minutes for every person** you expect to actively participate.

With groups larger than 5,
add more time to agenda items 1, 2, and 4.

Effective Facilitation

If you have more people or a more complex project, you will need to work harder to keep the conversation focused. For these meetings, we recommend:

- **Review the scripts** provided in the 'Step-by-Step' instructions to introduce topics and keep the conversation moving.
- **Assign one or more note takers**, so you can focus on facilitating the discussion.
- **Assign a time keeper**, who can prompt the group when time gets tight.

STEP-BY-STEP INSTRUCTIONS FOR RUNNING THE MEETING

You'll be leading two brief team discussions during this meeting. Both start by asking the team a question. These conversations work much better when the starting question is worded to help everyone clearly visualize their answers.

We've supplied sample questions to get you started.

To make these discussions work even better for your project, watch this short video from Michael Wilkinson about the "Secret of the Starting Question" and adjust our examples to fit your project.

1 Introductions

The meeting starts by introducing the project, then the team, then the agenda.

Introduce the Project

Welcome everyone, then ask the sponsor to open the meeting by quickly sharing the project goals with the group.

Introduce the Team

Go through each person on the call in order, **using the Attendee list** in the meeting as a guide.

You say:

> "Before we dig in, let's make sure we all know who's on the call and what we need to achieve today.
>
> We're going to introduce ourselves, starting with the person at the top of the Attendee list and working down the list. When it's your turn, please share your name, your role here, and the **one thing** you most want to get out of this kickoff."

This is your first opportunity to get the team engaged. Write down each person's important meeting goal in the notes. You'll review this list at the end of the meeting to make sure you've covered everything.

Introduce the agenda

Finally, ask the group if they've had time to review the agenda and materials. Point out that **they can click the Agenda tab** in the meeting menu bar to see the full details at any time. If needed, adjust the agenda to include any topic the group needs to add.

When you're ready, **click "Next >"** to get started with the first person's update.

Discuss: When We Succeed

2

This discussion **ensures everyone knows what project success really means** to the people who will approve the work, using a technique called "Remember the Future".

Introduce the discussion, and explain that **this question is for the project approvers**. Then ask the starting question you prepared.

Here's a sample starting question:

> " Let's assume this project meets the goals and is a wild success. When you sit down for your review 3 months after the project launch, and you're reviewing the projects you worked on and the impact they had, what will you be proud to share about this project?
>
> **What will the successful completion of this project have done for you and the organization?** "

Write down the key points of each person's response in the notes, and give the team some time to ask questions about what they've heard.

Once you're done with questions, **click "Next >"** to start the next topic.

Project Logistics

3

Discuss the project logistics information you prepared in advance.

Ask the team if they have **any questions or concerns about the proposed working plan**, and discuss this feedback as a team. Write down any improvements or changes to the project logistics.

Once the group is satisfied with the project logistics, **click "Next >"** to move to the next topic.

Discuss: Why Might this Project Fail

4

Now it's time to get the team actively thinking about how to safeguard the project's success using another meeting technique: the Premortem.

This question goes to the entire team, not just the approvers.

Introduce the discussion:

> "At this point, we know everything we can about this project, about what it will take to succeed, about the deadlines and the team involved. **Now we're going to imagine the worst**, that the project totally and utterly fails, and discuss **what we can do to prevent that**. This is for everyone.
>
> We'll **spend one minute individually thinking** of as many worst-case scenarios as you can. Then, we'll use the attendee list, starting at the bottom this time, and **hear one answer at a time** until we have them all listed out. Finally, we'll discuss what we can do to prevent these problems and **what we need to change in the project plan**
>
> Let's get started. I want you to think about other projects you've worked on like this one, about the team involved, and the resources we have. Envision everything we must accomplish to make this project a success.
>
> **Based on your experience, what might go wrong and cause the project to fail?**"

Watch the timer. Once the minute is up, ask the attendee at the bottom of the list to share their first answer. Continue through everyone on the list, capturing each response in writing. **Go through the list as many times as you need** to get all the ideas out there.

4 continued

Next, look at the list of possible problems, ask the team if they see ways they can prevent the issues.

Create action items and assign owners for each suggestion that will lead to a change in the project plan.

When the team is ready, **click "Next >"** to move to the final item.

5 Closing and Next Steps

You will automatically see a list of all the notes and action items captured in the meeting.

Quickly **review to make sure you covered each person's important goal** from the beginning of the meeting.

Then, ask the group to **look at the action items and confirm that they are accurate, assigned to the right people, and complete**. Add or update any action items that need to be fixed.

Finally, **confirm the next meeting date and time**.

End the meeting by thanking everyone for their participation and asking them to quickly provide meeting feedback.

For example, you might say:

> "There are a lot of ways to run this kind of meeting, and we all want to make sure this is a good use of our time. Before you leave, please quickly rate this meeting and provide some feedback on the form you'll see once the meeting ends."

After the meeting

Send out the follow-up email, which makes sure everyone gets their action items and a full report in their email, even if they couldn't attend the meeting.

RESOURCES FOR MASTERING KICKOFF MEETINGS

Websites

Innovation Games, "Remember the Future"
http://www.innovationgames.com/remember-the-future/

Gary Klein on HBR,
"Performing a Project Premortem"
https://hbr.org/2007/09/performing-a-project-premortem

Kevin Hoffman, "Good Kickoff Meetings"
http://goodkickoffmeetings.com/

Books

Diana Larsen and Ainsley Niles,
"Liftoff: Launching Agile Teams & Projects" 2011
http://onyxneon.com/books/liftoff/

Michael Wilkinson,
"The Secrets of Facilitation" 2012
http://www.leadstrat.com/product/the-secrets-of-facilitation-second-edition-autographed-copy/

Lucid Meetings Blog

http://blog.lucidmeetings.com/blog/the-essential-project-kickoff-meeting-agenda

ABOUT THE AUTHOR

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