

The Kick-Off Meeting

“The Kick-Off Meeting” is the first in a three-part series focused on a project’s lifecycle, which includes “The Kick-Off Meeting”, “Ongoing Project Management” and “Project Measurement, Evaluation and Reporting.”

As for “The Kick-Off Meeting” - its importance cannot be overstated. A well attended, mind and spirit kick-off meeting establishes the foundation of a project poised for success, and likewise, a project initiated without one will often take longer to complete, incur greater expenses or be doomed for failure from the beginning.

The kick-off meeting is the time when all the stakeholders, internal and external, come together for what is likely to be the first time to complete the following tasks:

- Define the project
- Clarify the goals and objectives
- Establish the individual roles and responsibilities
- Discuss interdependence of roles
- Create a timeline for success, including benchmarks or milestones

Steve Lance, the author of “The Little Blue Book of Advertising,” in a presentation to a chapter of the American Advertising Federation, presented the following example on the importance of getting the correct, complete information at the project inception.

He posed...What if you were asked to name some forms of transportation? You might say a bus or a car or even a bicycle. But, what if you were asked to name some forms of transportation that a family might use on vacation? The field may narrow to a plane or a cruise ship. But, what if you were asked to name a form of transportation that runs on gas and that a family of four could take on a weekend vacation less than 150 miles from their home to sleep overnight in a campsite? And now, we’re focused on an RV.

The more information the team can gather, discuss and agree upon at project inception, the more unified the team will be as they become focused on one strategy and ultimately the success of the project.

The kick-off meeting is a team building exercise, yet it is not the first exercise for the team members on the agency side. Here’s what you should know prior to planning a kick-off meeting:

Typically, in an advertising agency, projects are led by account managers, who are also known as account executives, account planners, project managers and the list goes on. An account manager is responsible for daily contact between the agency and one or more client accounts. The account manager interfaces with various agency departments to move projects through on behalf of the client.

This includes meeting with the creative director concerning creative issues and input, the media director concerning media issues, the public relations director concerning publicity, the director of interactive marketing concerning interactive projects, and the production manager concerning scheduling and timing.

The account manager has major input in developing strategic marketing plans for their clients. After the plans are developed and presented to clients, the account manager is responsible for carrying out the plan on a daily basis. For that reason, it is essential that the account manager execute a strategy for the kick-off meeting that will ensure participation from the attendees.

It begins with the inclusion of key stakeholders. Consideration should be given to the life of the project, its impact on other projects or campaigns and what departments it will impact.

Next, a suitable venue should be chosen, typically away from the normal work place. The event will most likely take the majority of the day, but even if it is not anticipated that it will, plan accordingly, as many participants have set aside time to contribute and a spark may turn into a fire. The room should be large enough to be comfortable with room to move around. All the facilities should be available, set up and tested (Video, overhead projector, screen, light dimmer etc.).

Prior to the meeting, the account manager should gather, filter, focus and distribute relevant research to the internal participants with enough time for each to read and prepare. The more information team members can learn about the project in advance of the meeting, the better the questions and discussion will be relating to its success. Just as it is essential that an account manager prepares and distributes research, it is equally important that each attendee fortunate enough to be invited take the time to read the research thoroughly and come prepared to contribute to the kick-off meeting's success.

An agenda is typically prepared, similar to the following:

1. Overview of the agenda, including housekeeping rules (mobile phones off, when/where refreshments, location of bathrooms etc.). Set the tone for a structured environment that embraces and relies on member participation.
2. Introductions, describing each participant's role, as well as, any concerns and expectations. Limit to 2 minutes each.
3. Project background review, including review of relevant research.
4. Discussion of project goals and objectives.
5. Discussion of project plan.
6. Discussion of methodology, describing how the work will be carried out - milestones, budget, resources.
7. Ongoing communication strategy.

At the conclusion of the kick-off meeting, the account manager should prepare and distribute meeting notes, inclusive of all relevant topics discussed, next steps, as well as specific tasks and deliverables to ensure a strong foundation for "Ongoing Project Management," the second in a three-part series focused on the lifecycle of a project.