Hybrid Kickoff Meeting Checklist

Company Name:

Meeting Date:

Attendees:

3-4 weeks before the meeting

Secure a date/time that is convenient for all teams/individuals involved

Send out an invitation with the date/time and an RSVP deadline

Identify stakeholders, appoint presenters, and select a meeting facilitator

For project kickoffs, use this time to research the project, client, or specific industry

2-3 weeks before the meeting

Book a venue that fits all attendees and has video and live streaming capabilities. Consider setting up additional time following the event with catered food or refreshments to allow for post-kickoff mingling and idea-sharing. For remote attendees, provide meal vouchers or encourage employees to meet at a coworking space

Reach out to your IT team or an IT freelancer. Consider if you will be streaming the event to other locations or will require A/V assistance for microphones, projection screens, and other equipment. Set up a digital stream of the kickoff for those who can't attend in person

Distribute a slide deck meeting agenda (download Owl Labs' meeting agenda slides separately) for all presenters along with any necessary tech specs or equipment

1-2 weeks before the meeting

Send out reminders for completed slides to be returned

Distribute a company-wide or team-wide call for questions to be answered during the kickoff. Then, you can pre-select questions ahead of time and save time during the event

Optional: Send out a question, thought, or poll ahead of time so you can discuss your team's current thoughts and address any issues as a group

2 days before the meeting

Finalize the agenda, order, and itinerary of the meeting or event

Make sure your video stream for remote participants is up and running.
Work with IT or AV support to test all functionality (with time to correct any errors)

Day of the meeting

Schedule an IT run-through that morning

Have remote attendees test out the live stream link ahead of time and ask a practice question	
Communicate with any external vendors and internal presenters to confirm attendance	
Send out reminder emails to all kickoff meeting attendees with the time and location of the event	

During the meeting

Make sure you have a note taker and meeting facilitator and that you record the meeting for all those who can't be in attendance	
Confirm that all participants can see and hear the presentations	
Identify stakeholders and their roles	
Review risks, roadblocks, and past failures	

For company or team kickoffs, include:
  • Presenter slides for agenda items with:
    - **Role, Deliverables, Next steps**	

For project kickoffs, include:
  • Introductions of all team members & their roles/responsibilities
  • Project scope
  • Budget
  • Timeline
  • Deliverables
  • Communication method
  • Goals	

Address questions from the group and share responses from the optional group question, thought, or poll	
Include a live brainstorming session for attendees to work in small groups to think of creative ways to solve company or team challenges or do an audience activity. Make sure remote attendees have a way to participate	
Outline a clear communication plan for the project or team	
End with clear next steps for the project or time frame (month, quarter, or year)	

1-2 hours after the meeting

Send out a recording of the event along with notes and any follow-up meeting dates	
Open lines of communication for any follow-up conversations or offer lunch or refreshments and mingling to discuss the kickoff. This is when your team will be the most fired up and can be a creative time that's productive to harness. Try a tool like Slack or Skype for Business, or have remote attendees video conference in on large monitors	

1-2 weeks after the meeting

Follow up with meeting attendees via email, small group sessions, or video conferencing to review goals and timelines	
Ask for feedback for future events	