



In-Person 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, consider setting up additional time following the event with catered food or refreshments to allow for post-kickoff mingling and idea-sharing	
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 Optional: hold a full run-through of the kickoff (in-person or virtually)	
Day of the meeting	
Schedule an IT run-through that morning	
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

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.

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