**Client Kickoff Meeting***Template*

The first meeting with our clients is critical. It’s our first opportunity to make a great and lasting relationship happen, and the perfect time to ask questions, set expectations, and create a sense of excitement and anticipation moving forward.

There are four **DO NOT SKIP THESE** parts to in designing a great kickoff meeting:

**Purpose: Clearly Understand the Purpose and Outcomes**

During the initial “kick off” stage of the planning, it’s critical that you clearly understand the purpose of our contract, so that you can accomplish the goals. Questions that will help you identify the purpose:

“Why do you want a \_\_\_\_\_\_\_\_\_\_\_\_\_ (strategic plan, facilitated meeting, team meeting, whatever we are doing for them)?”

“What outcomes or benefits would you like to see?”

“What kinds of conversations have you had around \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ in the past? Were they successful conversations? Why or why not?”

“Imagine if this were the day after the meeting…. and you are thinking to yourself: what a great process and result! We accomplished everything I wanted to accomplish! What is it that made you say that?”

“What topics should we discuss?”

“Tell me what I can do to make this meeting incredible for you?”

“What should we absolutely do during the meeting?”

“What should we avoid doing during the meeting?”

“What can we do to guarantee this isn’t a waste of time?”

“What else should I know that would make this a success?” (Here I look for personality conflicts, community issues, pet peeves, etc)

**People: Who will be involved and how?**

We prefer to involve as many people as possible in our processes – some may be key stakeholders while some might just inform the process. But it is critical for the client to let us know, and for us to offer our own recommendations. We do have a template for the client to fill out, which we usually send after the meeting as a follow up document.

Who is our contact person (one person) from the client?

Who will we involve in our process?

How will they be involved?

Part of the Task Force?

Surveys?

Interviews?

Invited to meetings?

Presentations or emails?

**Process: What are the Steps and the Timeline?**

Now that you have determined the true purpose, and the people we want to involve, it’s time to go over the proposed process and timeline. You need to accomplish several things:

1. Confirm specific dates (and times, if you can) for each meeting.
2. Determine locations for at least the first few meetings, so you can visit the site and plan for your work.
3. Set the actual date of adoption (if needed) for our work – usually a Board meeting or other date.
4. Set the day and time for weekly phone calls. We prefer to set them, and if we don’t need to talk that week it’s fine…but at least they are calendared.

Make sure the client knows that we understand that things change, and as we move through the process we stay in constant, weekly contact with them.

**Product: Determine the Deliverable**

Review again with the client (to set expectations and make sure): What do you need to have created as a result of our work? Some clients want notes/reports of every meeting. Some clients want Board updates on a monthly basis. Some clients want photos. There will always be a specific product at the end (a report, a Plan, a brochure, etc). Ask them if they have any specific ideas or examples of the final report.

If they have a brand book (with logos, graphics, CMYK colors, font choices and so on) now is a great time to ask for it!