

## ONE MEETING YOU MUST HAVE: THE KICK-OFF MEETING

By Aileen Leventon



And they're off... like thoroughbreds breaking from the gate and barreling down the track in single-minded pursuit of the finish line. Get the best people mobilized, act fast and make sure the client or sponsor knows you're on it. Does this image capture the typical start of a major matter or new project in which you are involved?

The kick-off meeting is the forum for collaborative planning and the foundation of project management. It also sets the tone for sound stewardship of resources, accountability of team members, and the goals of sound economics and delivery of value.

Rapid action and deliberative planning can co-exist.

### “But we already planned”

Many matters and projects start with limited information provided by the client or sponsor. On the basis of some information, “known unknowns,” and a reservoir of knowledge from prior experience, it is often possible to develop a preliminary assessment, outline a strategy, identify a team and

sketch the timing of key events.

There will also be many unarticulated assumptions and cognitive biases that affect resources, costs, scope and success. As we are increasingly called to account for the value we deliver, is it possible to be casual in how we manage our work? Early unstructured conversations and the free flow of documents are no longer adequate as the typical first shot at a plan.

### Establishing the tone for the matter

The kick-off meeting establishes both a plan and a mindset: team members understand *why* they are doing the work or the project, what they are doing and when. They have addressed assumptions and unknowns, committed to transparency and established communication channels. How does this happen?

**The business context.** Start the kick-off meeting by clarifying the business purpose of the legal work or project and the resources that have been allocated. Quantify it. This gives essential context and establishes that the legal work is not an end unto itself, but an investment in achieving a business outcome. The same applies to projects in which the business case must be explicit in order to assess success.

**Stakeholders.** A stakeholder is a person who will be integral to or affected by the work process or outcome. “No surprises” is the watchword in project management; it is critical to identify stakeholders early and anticipate their involvement.

Many stakeholders may not be in the room – these are the people whose opinions or behavior could derail the best-laid plans and may include key decision-makers. They may be the people who are most concerned about the project's impact on revenue, risk, and profitability, the people who must be briefed about status or decisions, the people within the organization who will review, revise or even co-author your work product. They may even be a competitor, vendor, regulator or constituent who has standing to challenge strategy or disrupt your approach. Soliciting information from the team at the kick-off meeting is essential in drawing the stakeholder map and may help in avoiding questions as the matter unfolds.

**Scope of work and underlying assumptions.** “No surprises” applies to the scope of work as well. Experienced practitioners know how a matter is likely to unfold, where they are making assumptions, and that unknowns could have major implications for strategy and budget. The goal at kick-off is to share that knowledge and discuss the implications of assumptions or information still to surface. Document what is outside the scope of work, either because it is unnecessary, within the sponsor's risk tolerance or because someone else has been designated to handle these activities. Be explicit. This is the best way to minimize waste and rework.

**Timeline.** The time line established in the kick-off meeting plots the sequence of activities in the work plan. Sub-groups will use this as a skeleton to form their own work plan and time line. The initial meeting is also the time to clarify roles and responsibilities, and to justify the participation of outside experts. It is important to ensure that schedules are harmonized and there is commitment to the timetable.

**Budget and Resource Allocation.** The budget can be refined now. This is not a bait and switch – a low-ball initial estimate to get the work that is followed by materially different numbers. The preliminary budget is likely based on incomplete information and may have included caveats and disclaimers. Important aspects of the scope of work, stakeholders and priorities may not have been known. Early assumptions may prove wrong. Facts may have changed. New information may emerge. Material changes may justify change in scope and budget.

**Monitoring and managing change** At this point, the kick-off meeting has served its purpose. There is a work plan and a time line, identification of project risks, assignment of key roles and responsibilities, as well as budget numbers or resources attached to phases or deliverables. In formal project management parlance, this is the Project Charter and Work Plan. This living plan will evolve and serve as the basis for monitoring and communicating during the course of the matter. Describe how and when that monitoring will occur and change will be communicated. If there is buy-in, it will reduce re-work and the need for more meetings.

\* \* \*

The kick-off meeting concludes. Then and only then, open the gates and unleash the focus, intensity and urgency to get the job done well.