**Corcava**

Template

# Project Kickoff Checklist and Agenda

A kickoff checklist plus a 45-60 minute agenda that prevents day-one confusion - roles, timeline, comms, approvals, and next steps.

- ☐ Pre-kickoff checklist (internal + client)
- ☐ 45-60 minute agenda with outcomes
- ☐ Decision log template
- ☐ Post-kickoff recap email template
- ☐ What to confirm when the client is not sure yet

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Tip: Share the agenda + the note doc link in advance. You will get clearer answers and fewer surprises after the call.

# Pre-kickoff checklist

### Before the call (internal)

☐ Confirm the objective and draft a success metric (what does 'done' mean?).

☐ Review the Scope of Work (deliverables, milestones, acceptance criteria, assumptions).

☐ Draft a first-pass timeline with 2-4 key milestones.

☐ List dependencies (client inputs, approvals, access, third-party vendors).

☐ Assign owners: project owner, delivery lead, reviewer/QA, client point of contact.

☐ Prepare a short risk list (unknowns, constraints, likely tradeoffs).

### Before the call (client)

☐ Send calendar invite with agenda + expected attendees (including an approver).

☐ Request access to required systems (brand assets, analytics, CMS, files, repos).

☐ Ask for examples / inspiration links and 'what good looks like' references.

☐ Confirm stakeholders and decision makers (who gives final approval?).

☐ Share the kickoff note doc link so the client can add context beforehand.

### Right after the call

☐ Send recap email within 2 hours (decisions, next steps, owners, due dates).

☐ Create the first tasks and assign owners + due dates.

☐ Record decisions in a decision log and keep it visible to everyone.

☐ Confirm the first milestone deliverable and the review/approval window.

# 45-60 minute kickoff agenda

Use 60 minutes for complex projects. If you only have 45 minutes, combine sections 3-5 and keep outcomes crisp.

| Time | Topic | Outcome |
|------|-------|---------|
| 0-5 | Introductions + context | Everyone knows roles and what will be decided today. |
| 5-15 | Goals and success | Single primary goal + 1-3 success metrics agreed. |
| 15-25 | Scope and deliverables | Deliverables confirmed; out-of-scope acknowledged. |
| 25-35 | Timeline and milestones | Milestones + review windows agreed; key dates captured. |
| 35-45 | Comms and approvals | Channel, cadence, approver, and response-time expectations set. |
| 45-55 | Risks and unknowns | Top risks listed with mitigation or open questions assigned. |
| 55-60 | Recap + next steps | Next actions with owners + due dates, plus the first milestone. |

## Decision log (template)

Keep this log visible. If a decision is not written down, it will be re-litigated later.

| Date | Decision | Owner | Notes / links |
|------|----------|-------|---------------|
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# Post-kickoff recap email (copy/paste)

**Subject:** Kickoff recap - decisions and next steps

Hi [Client name],

Thanks for the kickoff today. Here is a quick recap so we stay aligned:

**Goal:** [primary goal]
**Success metrics:** [metric 1], [metric 2], [metric 3]

**Decisions made:**
- [decision 1]
- [decision 2]

**Next steps:**
- [task] - Owner: [name] - Due: [date]
- [task] - Owner: [name] - Due: [date]

**Milestones:**
- [milestone 1] - Review window: [dates]

If anything above looks off, reply with corrections and we will update the plan. Otherwise, we will proceed with the next steps above.

Thanks,
[Your name]

## When the client is 'not sure yet'

☐ Ask for a single primary goal and force tradeoffs (if everything matters, nothing does).

☐ Clarify the decision maker and the approval path (who says yes?).

☐ Define what is fixed: deadline, budget, brand constraints, compliance, stakeholders.

☐ Collect 3-5 examples of what they like and 1-2 of what they hate (with reasons).

☐ Confirm the audience and the action you want them to take (the conversion moment).

☐ Agree on what can be decided later vs. what must be decided now to avoid rework.

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