

Example of a Process (Actual size is 8 1/2"x11")

This is one of 15 powerful, fully illustrated process to enable you to apply them in your actual projects. The example below has been reduced in size from its original 8 1/2 X 11"

Detailed Process: Plan and Facilitate a Kick-Off Meeting

1

FORM A CORE TEAM FOR YOUR KICK-OFF MEETING

A core team is a small group of people who serve as the steering committee for the kick-off meeting. This team will meet before and after the meeting to ensure continuity.

See Core Teams in this guide.

Call the first meeting of the core team to define the objectives of the kick-off meeting, define the outcomes or deliverables from the meeting, assign roles and responsibilities and, finally, define the measures of success.

Coordinate the logistics such as venue, meals, audio /visuals, etc.



A kick-off meeting can last from half a day up to three or more full days. Generally, for a new product two days is appropriate. This is one meeting where ample time is highly recommended. This is particularly true if you are bringing participants from around the world who may not see each other again until completion.

All process maps also include important additional information to help you apply the process to your project, with confidence

2

SOLICIT INPUT FROM THE PARTICIPANTS

Interview a sample of the participants; the core team can do this. These are informal interviews aimed at achieving the following results:

- Understand the dynamics of your group. For example, their expectations from the kick-off meeting, and their concerns and reservations.
- Build anticipation for the meeting. Participants will be aware of the forthcoming kick-off meeting, and start looking forward to it.
- Identify barriers and obstacles — i.e., anything that can interfere with the completion and success of the kick-off meeting.
- Elicit agenda items and topics for discussion.



Start the process at least four to six weeks prior to the actual date of the meeting. This will allow proper planning, scheduling by the participants, selection of the venue, etc.

3

CREATE THE AGENDA

Once you have received input from the participants through interviews, start developing the agenda for your meeting in full collaboration with the core team.

- Assignments and pre-work: Communicate to all participants everything they need to do prior to the meeting.
- Key questions and logistics: See example and template for Kick-Off Meeting Planning Tool in this guide.

4

INVITE PARTICIPANTS

Ensure that all participants have ample notice to plan to attend your meeting. Three to four weeks is suggested.

Ensure that all the participants understand their role in the kick-off meeting — i.e., those who are members of your team, those who provide input but are not members of your team, those who are managers here to support your team, etc.

Ensure that all guests understand the length of your kick-off meeting. These meetings are lengthy. Ensure that all logistics are in place. The venue, meals, flip charts, etc.

CONTINUED

Note that the information is in "plain English" to enable immediate implementation on your project

Example of a Template (Form) (Actual size is 8 1/2"x11")

This is a form to use when defining a Responsibility Matrix, it is one of 22 different templates (forms) in the e-Guide, every one has a "companion" version, which is fully fillable so you can use them in your projects.

The example below has been reduced in size from its original 8 1/2 X 11".

Every tool and every template has a hyperlink, you simply "click" and you are transferred to an actual form (template) within the same document.
You can now enter your information and share the form (template) with your team around the world



Example: Responsibility Matrix

Project Name: "EL DORADO" Date: November 2009
Project Leader: Ralph Gooch

	Project Sponsor	Functional Manager	Project Manager	Project Team	Steering Committee
Project Definition	(R) Fred Woo, General Mgr.		(R)	(D)	(I)
Business Requirements		(A) Mary Gomez, Marketing.		(D)	
Budgeting		(A) Al Wolf, Product Mgr.	(D)		
Status Reports		(I)	(D)		
Risk Management			(L)	(D)	

Every template (form) has a fully developed example to help you better understand its application.
Thus for every example there is a corresponding "fillable" template (form), where you can enter your information and share with the rest of your team — around the world

Code	Responsibility
A	Approve
R	Review

Code	Responsibility
C	Create
D	Deliver
I	Inform

Code	Responsibility
IN	Provide Input
N	Notified
L	Leads a Team or Sub-Team

Example of a Tool (Actual size is 8 1/2"x11")

This is one of 10 powerful tools contained in the e-Guide. Every tool is fully explained, plus a completed example is included.

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Every item in the tool is fully explained to enable you to use it in your project. No need to "guess" or interpret what the author meant.

Types of Debriefs

Type of Debrief	Reason to Execute	When to Execute
Pre-Birth	<ul style="list-style-type: none"> • Incorporate learning from previous projects. • Team building. 	<ul style="list-style-type: none"> • Before or at the time of your project kick-off.
Interim or Progress Debrief	<ul style="list-style-type: none"> • Impact change throughout the life of the project. • Early corrective action. • Improve communication. 	<ul style="list-style-type: none"> • Planned times — use your judgment.
Team Handoff <i>Your project is transferred to another organization or location.</i>	<ul style="list-style-type: none"> • Inform new team coming on board. • Formalize the handoff. 	<ul style="list-style-type: none"> • Major milestones.
Customer Engagement	<ul style="list-style-type: none"> • Early feedback from your customers on a new product. 	<ul style="list-style-type: none"> • During development. • After the new product has been announced.
Crisis Recovery	<ul style="list-style-type: none"> • Solve current problem. • Recover from a major setback. 	<ul style="list-style-type: none"> • When the stuff hits the fan!
End of Project	<ul style="list-style-type: none"> • Evaluate the entire project. • Closure for the team. • Benefit future projects. • Inform management of your accomplishments. 	<ul style="list-style-type: none"> • At the end of your project. • Shortly after the end of your project.

Fully Illustrated Example (Actual size is 8 1/2"x11")

This is one of 52 actual examples contained in the e-Guide. We include several examples to help you apply the tool or process in your project.

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What makes teams productive?

Training	Tools	Support	Motivation
Training on effective meetings	Web-based computer tools	A skilled facilitator	A committed team
The seven tools of quality management	The seven tools of quality management	Support from management	Commitment to each other's success
Training that is done at the right time	Training on effective meetings	A committed team mentor	No corporate politics
Experienced instructors	Dedicated, large conference room	The time needed to do the job	A committed team mentor
Training in full context of the problem	Have several flip charts	A respected team leader	
Training on communication skills		Work	

The same statement can appear in several columns.

The top row contains the "headers" or titles for each category. The name of the headers is decided by the team.

This is not clear. Every statement ought to have a verb and a noun. Ask the creator to clarify, and then rewrite it.