

# Project Kick-Off Meeting Checklist

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## Pre-Meeting Preparation

Tasks to be completed before the meeting to ensure a productive start.

### Review Project Proposal & Contract

Write something...

### Gather Relevant Project Documents (Drawings, Specifications, Permits)

 Upload File



### Confirm Attendance Count (For Room/Platform Capacity)

Enter a number...

### Confirm Date and Time of Meeting

Enter date...

### Choose Meeting Platform (In-Person, Zoom, Microsoft Teams, etc.)

- In-Person
- Zoom
- Microsoft Teams
- Google Meet
- Other

### Prepare Preliminary Agenda

Write something...

### Identify Key Stakeholders (Client, Architect, Engineer, Subcontractors)

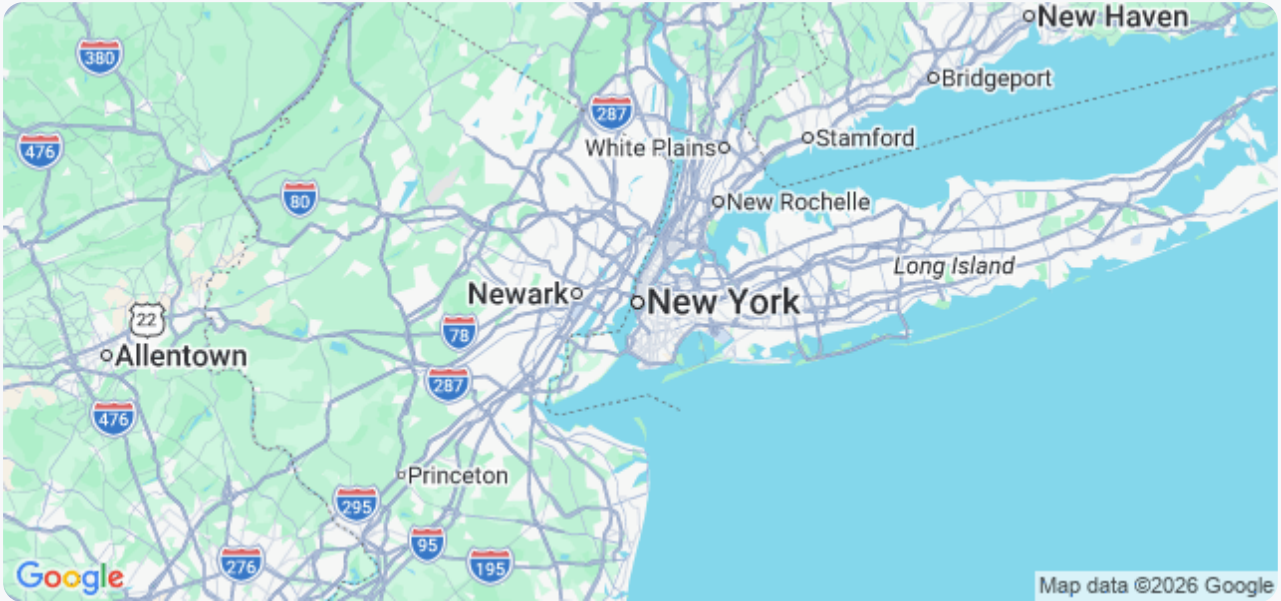
- Client
- Architect
- Structural Engineer
- MEP Engineer
- General Contractor
- Subcontractor 1
- Subcontractor 2

# Meeting Logistics

Ensuring the meeting environment and technology are set up correctly.

## Meeting Location (Physical or Virtual)

 [Set My Current Location](#)



## Meeting Start Time

Enter time...

## Number of Attendees Confirmed

Enter a number...


### Meeting Platform (if virtual)

- Microsoft Teams
- Zoom
- Google Meet
- Other

### Audio/Video Test Completed (if virtual)

- Yes
- No

### Meeting Agenda (Uploaded)

 Upload File

## Introductions & Roles

Ensuring all attendees are introduced and their roles are clearly defined.

### Meeting Facilitator Name

Write something...

### Project Manager Name

Write something...

### **Client Representative Name**

Write something...

### **Architect Name**

Write something...

### **General Contractor Name**

Write something...

### **Brief Introduction from Each Attendee (Role & Experience)**

Write something...

### **Confirm Roles Aligned with Project Organization Chart**

- Yes
- No
- N/A

# Project Overview & Goals

Reviewing the project scope, objectives, and key success factors.

## Project Description & Background

Write something...

## Project Goals - What are we trying to achieve?

Write something...

## Overall Project Budget (Estimated)

Enter a number...

## Key Project Objectives (SMART Goals)

Write something...

### **Project Delivery Method (e.g., Design-Bid-Build, Design-Build, CM at Risk)**

- Design-Bid-Build
- Design-Build
- CM at Risk
- Other

### **Scope Inclusions (Brief Summary)**

Write something...

### **Scope Exclusions (What's NOT included?)**

Write something...

## **Communication & Reporting**

Establishing communication protocols, reporting frequencies, and escalation paths.

### **Preferred Communication Method (Primary)**

- Email
- Phone Call
- Project Management Software (Specify)
- Instant Messaging (Specify)

### Preferred Communication Method (Urgent Issues)

- Phone Call
- Text Message
- Instant Messaging (Specify)

### Reporting Frequency (e.g., daily, weekly)

Enter a number...

### First Progress Report Due Date

Enter date...

### Escalation Path for Issues

Write something...

### Project Management Software

- Procore
- Autodesk Build
- PlanGrid
- Other (Specify)

### Contact Person for Reporting Inquiries

Write something...

# Schedule & Milestones

Reviewing the project schedule, key milestones, and potential constraints.

## Review Project Start Date

Enter date...

## Confirm Project Duration (in days/weeks)

Enter a number...

## Confirm Key Milestone 1 Target Date

Enter date...

## Confirm Key Milestone 2 Target Date

Enter date...

## Discuss Potential Schedule Constraints (e.g., weather, material lead times)

Write something...


### Schedule Review Frequency (Weekly/Bi-weekly/Monthly)

- Weekly
- Bi-weekly
- Monthly

### Estimate Float/Buffer Time for Potential Delays (in days)

Enter a number...

### Review Critical Path Schedule (if available)

 Upload File

## Risk & Issues Management

Identifying potential risks and establishing a process for issue resolution.

### Preliminary Risk Assessment Summary

Write something...

### Identified High-Level Risks (Select all that apply)

- Permitting Delays
- Material Price Fluctuations
- Labor Shortages
- Unexpected Site Conditions
- Weather Impacts
- Design Changes
- Subcontractor Performance

### Estimated Probability (1-10) for Top Risk (e.g., Permitting Delays)

Enter a number...

### Estimated Impact (1-10) for Top Risk (e.g., Permitting Delays)

Enter a number...

### Brief Mitigation Strategies Discussion for Top Risks

Write something...

### **Risk Escalation Path (Primary Contact)**

- Project Manager
- Site Superintendent
- Construction Director
- Client Representative

### **Date of Next Risk Review Meeting**

Enter date...

## **Next Steps & Action Items**

Defining immediate next steps and assigning responsibilities.

### **Identify and Assign Meeting Minutes Recorder**

Write something...

### **Brief Summary of Key Decisions Made**

Write something...

### Immediate Follow-Up Items (Select all that apply)

- Confirm Project Schedule
- Review and Approve Subcontractor List
- Finalize Site Logistics Plan
- Distribute Contact List
- Confirm Insurance Certificates

### Assigned To (Follow-up Item 1)

Write something...

### Due Date (Follow-up Item 1)

Enter date...

### Assigned To (Follow-up Item 2)

Write something...

### Due Date (Follow-up Item 2)

Enter date...

## Post-Meeting Follow-Up

Actions required after the meeting to ensure progress and accountability.

### Meeting Minutes Distribution Date

Enter date...

### Summary of Key Decisions & Action Items (Record for future reference)

Write something...

### Distribution List Confirmation (Confirm who received the minutes)

- Project Manager
- Client
- Superintendent
- Key Subcontractors
- Design Team

### Number of attendees who confirmed receipt of the meeting minutes

Enter a number...

### Notes on any outstanding questions or issues requiring further clarification

Write something...

### Upload of meeting recording (if applicable)

 Upload File