



Project Kick-Off Meeting Checklist


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

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