Project kickoff checklist

CHECKLIST TEMPLATE

Business _____ Location _____ Date _____

Kickoff

For each new project, before work starts

TASK	NOTES	INITIALS
Before the meeting		
☐ Check the scope of work and budget are signed		
☐ Brief the internal team on the scope, budget and deadlines		
☐ Set up the project in your project tool and time tracking		
☐ Send the client the agenda and a list of what to bring		
Kickoff meeting		
☐ Introduce both teams and name the decision-maker on each side		
☐ Walk through the goals, scope and what is out of scope		
☐ Agree the timeline, milestones and review rounds		
☐ Agree how and how often you will update the client		
After the meeting		
☐ Send notes with the decisions and next steps within a day		
☐ Collect access to the client's accounts, brand files and content Store logins in the agency password manager, never in email or chat.		
☐ Book the milestone check-ins in both calendars		

Completed by _____ Checked by (manager) _____ Date _____ Notes _____