Kickoff Meeting Guide

Momentum is key to every implementation, and the proper start will go a long way toward setting your project up for success! To help get your project off to a great start, we will want to establish a clear implementation timeline, confirm project goals, and determine the key next steps during your Kickoff Meeting.

Overview
The steps outlined in this document, along with proper planning and clear communication, will help you transition into a smooth implementation. This includes meeting preparation, agenda topics, meeting results and next steps.

Meeting Preparation
As you begin your implementation, it is important to adequately prepare for your Kickoff Meeting. Please reference the below information prior to your meeting, confirming that all required attendees will be present, as well as compiling all information relevant to your project.

- **Attendees:** As noted in the Pre-Implementation Guide and discussed during the Welcome Meeting, the Customer Project Team members should be in attendance, as well as any other significant project stakeholders. The most critical participants are:
  - Project Lead
  - Process Design
  - Decision Maker
  - IT Lead

- **Meeting Length:** The Kickoff Meeting typically requires between 60 and 90 minutes, although meeting times may vary based on requirements and complexities of each project.

- **What to bring:** Providing supporting documentation that clearly illustrates your current process and project goals is extremely helpful. The chart below provides examples of documentation you will want to bring to your Kickoff Meeting:

<table>
<thead>
<tr>
<th>What to bring</th>
<th>Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current and Proposed Process</td>
<td>▪ Work Order Process Flow</td>
</tr>
<tr>
<td>Documentation</td>
<td>▪ System Organizational Structure</td>
</tr>
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<td></td>
<td>▪ Asset Configuration</td>
</tr>
<tr>
<td>Reporting Requirements</td>
<td>▪ Existing reporting needs: Printed reports</td>
</tr>
<tr>
<td></td>
<td>▪ Future reporting needs: Excel Mockups</td>
</tr>
<tr>
<td>Relevant data for migration</td>
<td>▪ Regulatory / compliance reporting requirements</td>
</tr>
<tr>
<td></td>
<td>▪ List of tables from existing CMMS (if applicable)</td>
</tr>
<tr>
<td></td>
<td>▪ Existing spreadsheets in use</td>
</tr>
<tr>
<td>Login Information</td>
<td>▪ Installation complete or online access provided</td>
</tr>
</tbody>
</table>
Meeting Agenda
As mentioned during your Welcome Meeting, the information provided to your Customer Coordinator has been passed along to your Implementation Consultant, and will serve as the basis for discussion during your Kickoff Meeting. Below are the topics commonly discussed:

- Introductions
- Implementation Timeline
- Data Migration Strategy
- Customizations and/or Integrations
- Current Processes
- Reporting Goals
- Project Documentation Requirements
- General Questions

Meeting Results / Next Steps
In order to maintain forward progress during your project, your Implementation Consultant will attempt to schedule the following items prior to the conclusion of your Kickoff Meeting:

- Next meeting or remote training
- First in-person visit (if applicable)
- Start of data migration

Let’s Get Started!
Thank you for taking the time to prepare for your meeting by reviewing the Kickoff Meeting Guide. Discussing your project goals, timeline requirements, and key next steps will help contribute to a positive implementation. We look forward to partnering with you and your team as we work towards completing your project goals!