

# Pre-Kickoff Meeting

Try to collect the following information before your kickoff meeting so that your team can do some initial analysis for strategy discussions during your initial meeting.

## My Stuff

### Project Details

Project Primary Goal:

Secondary Goal:

Primary Contact Name:

Primary Contact Phone:

Primary Contact Email:

Secondary Contact Name:

Secondary Contact Phone:

Secondary Contact Email:

Additional Notes

Client Name

Project Name

## Their Stuff

### Mechanical Details

New Server or Existing Server:

### Existing Server Information

Server Type (Shared, VPS, Dedicated):

Server Host:

Server Username:

Server Password:

Connection Protocol (FTP/SSH):

Database Host:

Database Password:

Does company email reside on this server?

### Current Analytics

Service:

Username:

Password:

# Kickoff Meeting *Technical*

## Define the primary goal

Detail what the primary goal of the project is. (*Buy a product, fill out a contact form, post a comment*)

## Define the secondary goal

If there is a secondary goal what is it? (*Post a review, sign up for the newsletter, post a comment*)

## List supporting features

This portion of the conversation will take the longest. You can expedite the process by taking the following approach:

1. List all of the supporting features of the application first with no discussion.
2. Then go back through and list how each feature supports the primary or secondary goal.

# Kickoff Meeting *Copy & Media*

## Who will be responsible for copy for the website?

This includes all text and copy for the website.

<b>Our Responsibilities</b>	<b>Due Date</b>	<b>Customer Resp.</b>	<b>Due Date</b>
-----------------------------	-----------------	-----------------------	-----------------

## Who is responsible for supporting images?

Supporting images are photography of the customer's store-front, product shots, or stock photography. Does the contract state who is responsible for any photography costs?

<b>Our Responsibilities</b>	<b>Due Date</b>	<b>Customer Resp.</b>	<b>Due Date</b>
-----------------------------	-----------------	-----------------------	-----------------

## Who is responsible for supporting video?

Who is responsible for creating any video that will appear on the website?

<b>Our Responsibilities</b>	<b>Due Date</b>	<b>Customer Resp.</b>	<b>Due Date</b>
-----------------------------	-----------------	-----------------------	-----------------

## Are there any company assets currently available that could be recycled?

These assets might include the following: *Existing commercials, staff photos, brochure source files, existing website copy.*

# Kickoff Meeting *Aesthetic*

## What is the look and feel we should be seeking to create?

To reach a solid answer for this I try the following:

Are there any existing campaigns the site should mimic?

Pick the word that best describes the *message* you want to convey:

*Playful*

*Serious*

Pick the word that best describes the *feeling* you want to convey:

*Youthful*

*Experienced*

Pick the word that best describes the *style* you want to convey:

*Clean (few textures)*

*Robust (many textures)*

Are there two sites that are not in your company's field that make you feel the way you want your site to make you feel?

## What are the defining colors of the company?

These colors could be from the company logo or from other marketing campaigns.

## Do you have a vector version of your company logo and any supporting brand logos that will be needed?

Our Responsibilities

Due Date

Customer Resp.

Due Date

# Kickoff Meeting *Release*

## What is the scheduled release date?

When will the project be available to the public.

**Our Responsibilities**

**Due Date**

**Customer Resp.**

**Due Date**

## What is the go-to-market strategy?

Will there be a beta test, slow roll out, or will the project be immediately available to the public?

**Our Responsibilities**

**Due Date**

**Customer Resp.**

**Due Date**

# Kickoff Meeting *Support & Revisions*

## What is expected in terms of support?

How will we support this project once it goes live?

<b>Our Responsibilities</b>	<b>Due Date</b>	<b>Customer Resp.</b>	<b>Due Date</b>
-----------------------------	-----------------	-----------------------	-----------------

## How will future revisions be deployed?

After this project goes live will we be asked to develop additional features?

<b>Our Responsibilities</b>	<b>Due Date</b>	<b>Customer Resp.</b>	<b>Due Date</b>
-----------------------------	-----------------	-----------------------	-----------------

## How will new ideas that come during production be handled?

We typically hold any change requests until the end of the project unless the request changes the project's structure and the change needs to happen immediately.

<b>Our Responsibilities</b>	<b>Due Date</b>	<b>Customer Resp.</b>	<b>Due Date</b>
-----------------------------	-----------------	-----------------------	-----------------

# Kickoff Meeting *Marketing*

## What type of support marketing needs to be started to promote this project?

If the project will need supporting marketing like blog entries, guest-posting, social media accounts, or traditional advertising they should be identified now.

**Our Responsibilities**

**Due Date**

**Customer Resp.**

**Due Date**

## How will marketing efforts be deployed?

When should other marketing parties expect to launch the marketing efforts to support the roll out of this project?

**Our Responsibilities**

**Due Date**

**Customer Resp.**

**Due Date**