Kick-off Meeting Checklist

CM 101 discusses the need to have a kick-off meeting as part of contract management. But, there is one very important aspect of these kick-off meetings that is almost always overlooked—aligning your understandings with the vendor's understandings.

Instructions

1. If you feel that a meeting with the vendor is necessary, please consider these questions in advance of any meeting with the vendor.
2. Choose the right type of meeting (in person or call).
3. In more complex service contracts, you may choose to include the vendor's personnel, such as the people delivering the day-to-day services.

Aligning with a Vendor

- ☐ What obligations does the vendor agree they have to perform? (Please don't assume the vendor has read the Statement of Work or the final contract.)
- ☐ What roles at the vendor's business (and individuals in those roles) will accomplish those obligations?
- ☐ What skills or functional background do those individuals have?
- ☐ What are the levels of authority?
  - Should you tell the man who comes to wax the floors to remember to wax the hallway or should you talk to the owner?
  - Should you tell the vendor's president that a test failed to meet expectations or the lead software architect? Or, both?
- ☐ What tools or systems will they be using to coordinate multiple internal team members?
- ☐ What tools do they want to use to communicate with the Agency? (Calls, email, meetings, meeting notes)
- ☐ What Agency obligations are they relying on? (approvals, scheduling meetings etc.)
  - Do you agree with those obligations?
- ☐ From the vendor's perspective does the Agency have implied (unstated) obligations to the vendor? (If so, clear those up at this meeting.)

The **Contract Summary** and the results of the kick-off meeting will dictate your over-arching contract and relationship management strategy.