

How to Prepare for Your Planning Call and Kickoff Week



Your Timeline:

- »»» Step 1. Pre-Planning Call Prep
- »»» Step 2. Planning Call
- »»» Step 3. Workshops and Kickoff Prep
- »»» Step 4. Kickoff Week

What You Need to Do Before Your Planning Call

Identify your key call participants. Typically, will include your PM and (if applicable) internal project sponsors.

Establish your internal project team before the planning call and prepare to commit to timelines and responsibilities.

Clear your team's time for a 1 hour data workshop and a 1 hour comp workshop before kickoff week.

What You Need to Do Before Your Workshops

Clear 6 hours of time on your team's calendars during kickoff week.

Finish and collect your compensation plans and documentation before the workshops

Gather required data inputs prior to the data workshop.

What You Need to Do Before Kickoff Week

Finalize Deliverables

Incorporate feedback or adjustments from the compensation workshop to ensure the plans are finalized and ready for kickoff.
Address any data gaps identified during the data workshop.

Confirm Team Roles and Responsibilities

Clearly define each team member's responsibilities for the kickoff and subsequent project phases.

Prepare Your Team's Schedules

Coordinate with team members to ensure their availability during the kickoff meeting and early project activities.

Review Workshop Outputs

Ensure all action items or decisions from the workshops are addressed and documented.
Use these outputs to create a clear agenda for the kickoff meeting.

Align Project Goals

Review the project objectives and ensure alignment with your implementation partner.
Clarify any remaining questions about the project timeline or deliverables.

Communicate with Your Project Team

Share any preparatory materials or schedules with internal stakeholders.