CLIENT OPERATIONS

Client kickoff meeting agenda

A focused kickoff agenda that aligns the project team and client on outcomes, owners, milestones, and the first next step.

A practical worksheet from Stelaah

Use it, adapt it, and save it with the client work it supports.

HOW TO USE THIS

A project is ready to begin and everyone needs one shared plan.

WORK THROUGH THE CHECKLIST

- [ ] 01 **Restate the desired outcome**
- [ ] 02 **Introduce owners and roles**
- [ ] 03 **Confirm scope and exclusions**
- [ ] 04 **Walk through milestones**
- [ ] 05 **Agree the approval path**
- [ ] 06 **Document the first action**

Before you close this

Name one owner, one next action, and one date. A worksheet only helps when the next commitment is visible to the people doing the work.

Notes and decisions

Use this page to record what changes after you work through the checklist.

This practical workflow resource is not legal, financial, tax, or security advice. Adapt it to your team and circumstances.