



Real World Team Leadership Tool 0: Kickoff

Agenda

Date: _____

Time: _____ to _____

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|--|---|-----------------------|
| Leader: Recorder: Timekeeper: Process Observer: Learning Observer: Parking Lot Attendant: Optional Roles: | | |
| Participants: | | |
| Instructions | This is a standard format for all 9 Real World Leadership tools. It is designed to help you lead effective, time-limited work sessions. Wrapped inside the generic format are the 5 steps that are unique to Tool 0: Kickoff. Use this tool to get things started. | |
| Time | Steps of the Tool | Responsibility |
| 10 Minutes | Meeting Overview <i>(Note: This is the standard start for all nine work session tools.)</i> <ul style="list-style-type: none"> ✓ Consider theme, pagentry, trappings and tools to engage project-wide “campaign” ✓ Introduce participants, their roles in the organization, and their functions in the project ✓ Assign meeting roles and ensure that all have the tools they need for their roles ✓ Confirm goals of meeting and the type of meeting ✓ Review and finalize agenda topics and their order in this meeting (This is an example of “tell ‘em what you’re going to tell ‘em”) ✓ Assign times to each topic | Leader |
| 30 minutes | 1. “The Big Picture” - Review Overall Project <i>(Note: As with each of the other 8 tools, this first step after the meeting overview is for you to lay out all pertinent information, bring the others up to speed and define the scope of the situation.)</i> <ol style="list-style-type: none"> a) What is the history leading up to this project? b) What is the purpose and what are the goals for this project? c) What are the “gotta haves”? By when? d) What are the “nice to haves”? e) Who is involved? Who’s not involved? f) What tools will you use to plan and manage this project? g) Identify templates for success – who else has done this or similar projects very well (or not well) that we can learn from? | Leader |

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| 100 minutes | <p>2. Plan the Project (using some level of project management tools)</p> <p>a) Review the planning tools you will be using and secure training for the team as needed to best use these tools</p> <p>i) See RevCon Project Plan (separate page)</p> <p>b) The five elements of a project are:</p> <p>i) Methods/procedures/planning factors - the “hows”, and “whens” of a project</p> <p>ii) Material resource factors - supplies, smaller tools</p> <p>iii) People factors - skill training, expectation setting, motivation, support</p> <p>iv) Machine/equipment factors - large tools</p> <p>v) Chance or environmental factors - generally uncontrollable factors, minimized by strategic or contingency planning (like cross-training human back-ups to “Plan A”, using UPS systems for the net, tape back-up of data files, health checks of principals, etc.)</p> <p>c) Be sure that (to the extent that you can) you:</p> <p>i) Define all tasks to needed level of detail</p> <p>ii) Define all deadlines and milestones</p> <p>iii) Specify all resources and budgets</p> <p>iv) Ensure that one person owns each significant piece of the project (to clarify responsibility and accountability)</p> <p>v) Involve people “downstream” from the project as early on as possible. This includes end-users and those involved later in the project itself</p> | Leader |
| 15 minutes | 3. Break | Leader |
| 30 minutes | <p>4. Review the Project Plan for Understanding and Acceptance by the Team</p> <p>a) What are the strongest aspects to this plan?</p> <p>b) What is weakest? What skills, resources, tools are missing at this point?</p> <p>c) What is unclear/confusing?</p> | Leader |
| 10 minutes | 5. Commit to Periodic Meetings to Review Progress and Celebrate Accomplishments | Leader |
| | 6. Get Crackin’ (deploy and act on the tasks assigned) | Leader |
| 15 Minutes | <p>Administrative Wrap-up</p> <ul style="list-style-type: none"> ✓ Address issues in Parking Lot ✓ Review action items and accountabilities (what by whom by when). Confirm next meeting ✓ Provide Process Observer report ✓ Provide Learning Observer report ✓ Discuss: Were the goals of this meeting met? | <p>Parking Attndnt</p> <p>Recorder</p> <p>Process Observer</p> <p>Learning Observer</p> <p>Participants</p> |