



# Avoid Kick-Off Meeting Nightmares



Presenter:

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# Introduction

- My proposal journey...so far
  - Stumbled into proposal writing in 2001 in the healthcare business
  - Got “passionate about proposals” at my first APMP conference in 2002
  - Built and implemented proposal best practices
  - Grew from one-man shop to leading a team of 10
  - Earned Foundation Level APMP accreditation in 2008
  - Started consulting July 1, 2009
  - 725 proposals; 70% win rate; \$600 million in revenue
- My perspective
  - Mid-sized company w/ 4,000 employees
  - Sales-driven and collaborative culture
  - Senior/executive leadership involvement and buy-in



## Why this topic?

- Are you frustrated by:
  - The lack of sales person involvement
  - Spending hours trying to get the same information to many people
  - Last minute changes to strategy and direction
  - Not getting issues resolved on the front end
  - People not adhering to the timelines/deadlines
  - [INSERT YOUR PAIN HERE]

**Get a handle on your project from the get-go with a formal, succinct and informative kick-off meeting.**



# The 5 W's of a Kick-off Meeting

## What is a kick-off meeting?

- The project's starting point
- Getting to know the team members
- Sharing of key information
- Sharing of ideas
- Providing context
- Establish focus
- Structured and professional
- Setting the stage for success





# The 5 W's of a Kick-off Meeting

## Why is a kick-off meeting important?

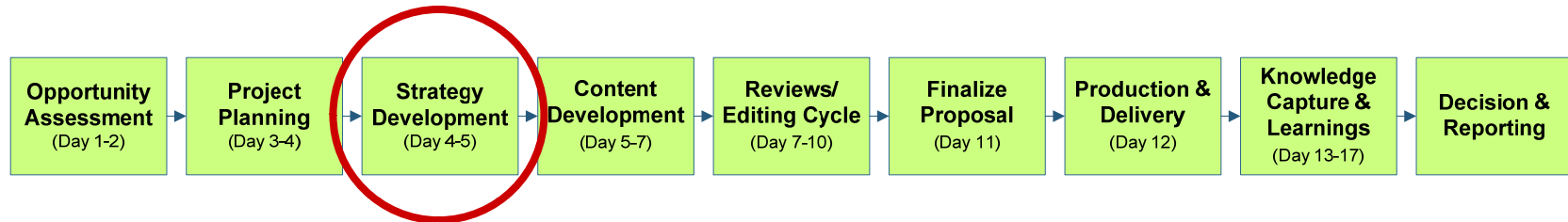
- Because knowledge is power
- Enables team members to significantly and meaningfully contribute
- Ensures a customer-focused story
- Saves everybody time
- Issues can be addressed immediately
- Enables team members to hit the ground running
- Establishes accountability and responsibility





# The 5 W's of a Kick-off Meeting

## When should the kick-off meeting occur?



- Early in the process
- Before the questions are due
- After an initial meeting with the sales person
- When all or most of the invitees can attend
- ALWAYS



# The 5 W's of a Kick-off Meeting

## Where should a kick-off meeting take place?

- In a conference room with a collaborative set-up (round table)
- In person whenever possible; or webex
- At a convenient location (the building where most of the attendees work)
- Where people feel comfortable to listen and share





# The 5 W's of a Kick-off Meeting

## Who should attend the kick-off meeting?

- Sales person (the primary presenter)
- Proposal writer(s) and manager(s)
- Primary subject matter experts/decision makers/team members
- Executive leaders from sales, operations and finance





**Bottom line...it takes teamwork to raise a great proposal.**





# Kick-off Meeting Template Example



Kick-off Meeting  
Presentation Example



# Keys to Success

- Sales person leads the meeting
- Formalize the presentation – make a template
- Understand the “buzz words” – rename the meeting
- Make it mandatory – “if you can’t attend, send a representative on your behalf”
- Invite executive/senior leadership
- Assign a note taker
- Establish collaborative atmosphere
- Make it relevant to your business/audience
- Do not go over the scheduled time
- Review key points at the end
- Follow-up within 24 hours with meeting notes, timelines, assignments



# Successful Outcomes

- Sales person is highly engaged in the process
- Better, more focused answers from SMEs
- Executive leadership involvement and understanding of the process
- Saves time
- Ensures accountability
- Better written proposal

**Knowledge IS power**



## Discussion

- How will a formalized kick-off meeting, focused on sharing knowledge, improve your projects?
- What will it take to make this happen in your organization?



**That's all folks!**

*Thank you for your time!*

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