START: PHASE 1

At the end of this module you'll be able to:

- Identify how a Project Manager is selected
- List 4 pieces of information needed in a project charter
- List 4 ways to conduct an effective kick-off meeting

When we receive new work, we always confirm that the contract has been signed. A signed contract confirms that the project has been approved.

Work can now start on the Project Charter, which authorizes the project to begin. The Charter is initiated with the information found in the contract or agreement, and will be finalized after the kick-off meeting. This is covered in more detail later on.

It's also during the Start phase that we assign a Project Manager (or PM). In addition to project management experience, our PMs all have various skillsets and expertise in video production, eLearning, web conferencing, and website design. To determine who will manage the project, our Project Director reviews the contract, which states the objectives for the work, and aligns the skills of a PM to the requirements of the contract.

After the project starts, our PM reviews the contract, the outline of the business goals for the project, and any existing documentation in order to determine what shape the deliverables will take. For example, if we're delivering videos, should we use live action, or would something like a whiteboard animation be more effective? If online training is required and eLearning is the best modality, how much content is available, and is it easily transferable or will it require re-design? Does the project involve web conferences? If so, how can the content be interactive and presented online for remote access? These questions and brainstorming techniques with the initial project team help our PM to determine the format of the deliverables best suited to achieve the goals of the project.

Next, our PM verifies with the client that our approach aligns with the project goals and the client's overall business strategies. Then our PM assembles the official project team and determines roles and responsibilities. When choosing team members, many factors are taken into consideration. They can include:

- Experience
- Expertise
- Availability

Matching the needs of the project with the right people indicates that our PM has started thinking about the quality component of the project to ensure the work meets the client's expectations.

Now it's time to facilitate a kick-off meeting. The kick-off is a chance to have all team members and clients meet face-to-face to discuss the project. This meeting helps to develop client relationships and confirms what the client wants, and how we can effectively deliver. As we know, emailing, phone calls, and web meetings do not take the place of being in person and hearing and seeing the client's needs. It demonstrates that we are committed and ready to help clients achieve their goals.

For an effective kick-off meeting, our PMs always:

- Have the meeting face-to-face if at all possible
- Listen to the needs of the client

- Repeat back the needs and objectives of the client
- Record all information as meeting minutes, and copy all necessary items to the Project Charter

After the project team is formed and the kick-off meeting has happened, it's time to finalize and share the Project Charter with everyone involved. As stated before, this document indicates that the project is underway, and it provides details for the project team. It outlines at a high level:

- The summary, or business case, of the project
- Key objectives and deliverables
- Assumptions, risks, and constraints
- Project deliverables
- What is in and out of scope
- Phases and milestones
- Communication preferences

OK, now it's time to work right? Well, actually it's time to plan the work. When you're ready, continue to Module 2 to learn about work planning.