# Kick-off meeting template

Following segmentation and the appropriate planning of your supplier relationship management (SRM) strategy/project, the SRM project group within your organisation should have some proposed initiatives. The purpose of a kick-off meeting is to get wider support for these initiatives from stakeholders on the supplier/provider side. The outcome of this will also verify the results of segmentation, as truly strategic suppliers will be mutually invested in the proposed SRM project. Without external support to leverage, their position may need adjusting to ‘transactional’ and the *planning* phase will need revisiting.

***Formalised communication*** (such as meeting agendas and minutes) let stakeholders quickly familiarise themselves with the key details ahead of, during, and following a kick-off meeting.

***Establishing and communicating outcomes*** provides a roadmap to follow throughout the project and reinforces progress. By proactively documenting desired and achieved outcomes to date, program managers can get increased commitment from stakeholders.

***Specifying action owners*** lets stakeholders be accountable where their full attention is needed. They can then engage on an as-needed basis for any other project requirements if they have the capacity. A RACI template (available on the New Zealand Government Procurement website) should be completed to give insight into how each stakeholder will be engaged throughout the project.

A formal meeting agenda should include the following. You can use the below tables as a template.

* + When the meeting was, and who attended.
  + What the agenda items were.
  + Summarised actions to progress the project.
  + An outline of when next steps should be completed by.
* The critical talking points relating to each agenda item (give detail so that stakeholders can reference discussion points outside of the meeting).
* Any questions that remain unanswered at the end of the meeting (make sure follow-up answers are distributed to the relevant stakeholders after the meeting).

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| MEETING DETAILS | |
| Organiser |  |
| Date |  |
| Time |  |
| Location |  |

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| --- | --- | --- | --- |
| MEETING ATTENDEES | | | |
| Agency attendees | **Role** | **Supplier attendees** | **Role** |
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| AGENDA ITEMS | | | |
| Item number | **Item description** | **Raised by** | **Item requirement** |
| 1. | Overview of meeting purpose and desired outcomes | Name, role (optional), customer/supplier | Inform |
| 2. | Recap supplier engagement history, strategy, and current expectations | Name, role (optional), customer/supplier | Inform |
| 3. | Discuss and validate SRM value opportunities (there is an SRM value proposition template available on the NZGP website) | Name, role (optional), customer/supplier | Discuss |
| 4. | Implement SRM governance model | Name, role (optional), customer/supplier | Action |
| 5. | Define reporting metrics and cycle | Name, role (optional), customer/supplier | Discuss/decide |
| 6. | Capture and distribute RACI | Name, role (optional), customer/supplier | Action |

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| AGENDA OUTCOMES | | | | |
| Item number | **Outcome** | **Next step action** | **Action owner** | **Date of next update** |
| 1. | All members agreed on purpose and outcomes | N/A | N/A |  |
| 2. | Supplier engagement model reviewed | Detailed review of existing contract and SLA | Name, role (optional), customer/supplier |  |
| 3. | Value initiatives reviewed and prioritised | Arrange supplier meeting to discuss top priorities | Name, role (optional), customer/supplier |  |
| 4. | Desired governance model outlined | Relationship owner to document and distribute | Name, role (optional), customer/supplier |  |
| 5. | Internal reporting framework agreed in principle | Relationship owner to finalise supplier alignment | Name, role (optional), customer/supplier |  |
| 6. | RACI finalised | Relationship owner to document and distribute | Name, role (optional), customer/supplier |  |

### Additional notes

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| Item number: 1 | Overview of meeting purpose and desired outcomes | | | | | |
| Notes: | |  | | | | |
| Questions: | |  | | | | |
| Actions: | |  | **Action owner:** |  | **Date of next update:** |  |

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| Item number: 2 | Recap supplier engagement history, strategy, and current expectations | | | | | |
| Notes: | |  | | | | |
| Questions: | |  | | | | |
| Actions: | |  | **Action owner:** |  | **Date of next update:** |  |

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| Item number: 3 | Discuss and validate SRM value opportunities | | | | | |
| Notes: | |  | | | | |
| Questions: | |  | | | | |
| Actions: | |  | **Action owner:** |  | **Date of next update:** |  |