



SOCIETY OF  
RESEARCH  
ADMINISTRATORS  
INTERNATIONAL

# Successful Project Kick-Offs in Research

*Setting the Stage for Success*

# Meet the Presenters



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# Learning Objectives

- 1. Master Key Components of Impactful Project Kick-Offs:** Participants will learn how to design and lead kick-off meetings that set clear agendas, align objectives, define roles, and establish project norms to enable effective collaboration.
- 2. Apply Project Kick-Off Tools and Checklists:** Participants will gain hands-on knowledge of tools, checklists, and a detailed agenda presentation template that structures the kick-off process, reduce oversight, and improve engagement in any meeting format.
- 3. Identify and Address Early Risks and Dependencies:** Techniques for recognizing and mitigating potential risks or dependencies will be shared to help teams prepare proactively.
- 4. Adapt Kick-Off Strategies for Diverse Formats:** Participants will explore adaptable agendas and communication approaches for engaging stakeholders in various project settings.

# Session Overview

- Importance of Project Kick-Offs
- Key Components
- Tools and Checklists for Kick-Offs
- Addressing Early Risks and Dependencies
- Adapting Kick-Off Strategies for Diverse Formats
- Summary/QA/Conclusion
- Resources

# Session Polling

[Add Slido Info]



# What is your role in research project management?

**Principal Investigator (PI)**

**Research Administrator**

**Research Project Manager**

**Finance/Sponsored Programs Team**

**Other**

# WHAT is a Project Kickoff?

**Definition:** A structured meeting that brings all key players together to align on project goals, expectations, and next steps.

**Purpose:**

- Establish a shared understanding
- Identify key roles and responsibilities
- Set expectations for communication and decision-making
- Surface risks early

**Key topics covered:**

- Project scope, timeline, and deliverables
- Budget and funding considerations
- Compliance and reporting requirements



# **Which of the following is NOT a key purpose of a project kick-off?**

- A. Establishing a shared understanding of project goals**
- B. Identifying key roles and responsibilities**
- C. Conducting a detailed financial audit**
- D. Setting expectations for communication and decision-making**

# Why Kick-Offs Matter



Aligns teams with project vision



Builds collaboration & shared purpose



Identifies risks & challenges early

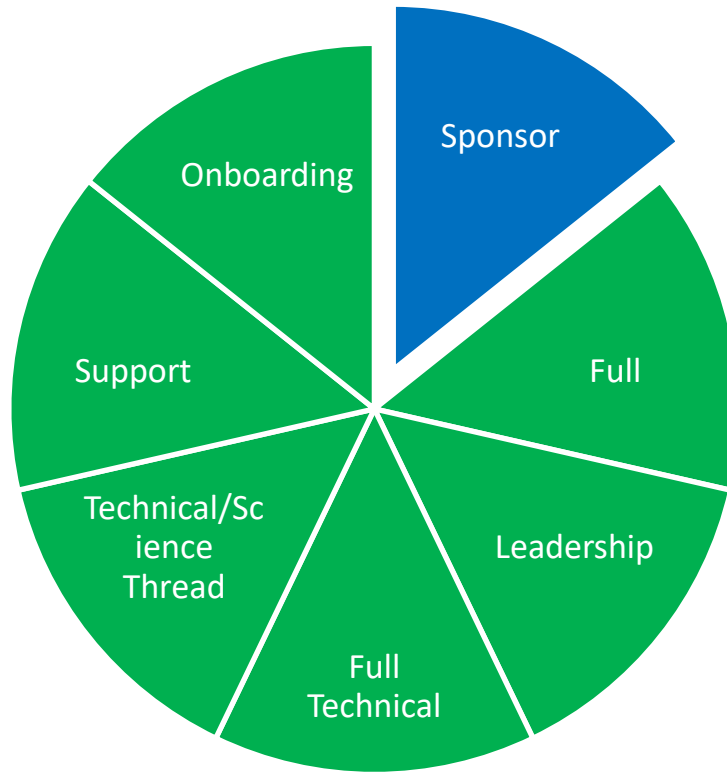


Provides structure & key milestones



Establishes communication & workflows

# Type of Kick-Offs



# Objectives of a Kick-Off Meeting

- Define project scope & success criteria
- Clarify roles, responsibilities, and decision-making
- Introduce tools, reporting, and approval processes
- Outline timelines, deliverables, and expectations
- Set the foundation for productive teamwork

# When is the ideal time to conduct a project kick-off meeting?

- A. Before the proposal is submitted
- B. Once the project is funded but before major work begins
- C. After the first reporting deadline
- D. Midway through the project timeline

# Key Components of Impactful Kick-Offs

# Kick-Off Design Consideration

**Who** – Relevant people involved

**When** – Timing based on event type

**How** – Format, length, structure, process, roles & responsibilities

**What** – Topics to be covered

**Where** – Event location & attendee locations

# WHO are the Key Stakeholders?

## **Internal Stakeholders:**

- Principal Investigator (PI) – Oversees research & project direction
- Research Project Manager – Facilitates coordination and execution
- Research Administrators – Ensure compliance, budgeting, and reporting
- Finance & Sponsored Programs Teams – Manage funds and invoicing

## **External Stakeholders (if applicable):**

- Collaborating universities, industry partners, and government agencies
- Subaward institutions and consultants



# WHEN Should a Kickoff Happen?

## **Ideal Timing:**

- As soon as the project is funded and before major work begins
- Before the first reporting deadline or milestone

## **Best Practices:**

- Schedule early to ensure alignment
- Document key agreements and decisions
- Follow up with an action plan and check-ins

# HOW to Run It Successfully

## HOW to run a great kickoff?

- Prepare: Share an agenda and key documents in advance
- Engage: Encourage participation and discussion
- Clarify: Define next steps, assign action items, and schedule follow-ups

# Designing Effective Agendas

**Welcome & Introductions** – Team members and stakeholders

**Project Overview & Objectives** – Purpose and goals

**Scope & Deliverables** – What's included, key outputs

**Roles & Responsibilities** – Clarify team member roles (includes governance)

**Expectations & Norms** – Team behavior and performance standards

**Timeline & Milestones** – Key dates and deliverables

**Communication & Reporting** – Protocols, updates, and meetings

**Risk Management** – Identify and address potential risks

**Strategy (Optional)** – Long-term planning and alignment

**Change Management** – Process for handling scope and changes

**Next Steps & Q&A** – Clarify immediate actions and address questions

# Defining Roles and Responsibilities

Clarity in roles is essential for project success. It ensures accountability, streamlines collaboration, and reduces inefficiencies.

## Key Areas to Assign:

- ✓ Event Planning & Logistics
- ✓ Project Scope & Objectives Definition
- ✓ Budget, Funding & Compliance Alignment
- ✓ Communication & Stakeholder Engagement
- ✓ Post-Kickoff Documentation & Follow-Up

## Ways to Document:

- RACI Chart (Responsible, Accountable, Consulted, Informed)
- Other Defined Frameworks (Org charts, SOPs, structured workflows)

# Kick Off Meeting Planning

## A. Pre-Kick-Off Preparation (4-6 weeks prior)

- ✓ Define meeting objectives, key participants, and format.
- ✓ Secure venue/virtual platform and send invitations.
- ✓ Develop agenda and assign speaking roles.

## B. Event Execution (Day-of)

- ✓ Set up technology and materials.
- ✓ Welcome participants and provide an overview.
- ✓ Facilitate discussions, presentations, and Q&A.

## C. Post-Kick-Off Follow-Up (1-2 weeks after)

- ✓ Distribute meeting notes and action items.
- ✓ Address unanswered questions.
- ✓ Provide access to materials and set up check-ins.

# What is the most common challenge you face when conducting a project kick-off?

- A. Engaging all stakeholders
- B. Defining clear roles and responsibilities
- C. Setting realistic expectations
- D. Managing competing priorities

# Project Foundations

- Welcome & Introductions (Who's involved?)
- Project Overview & Objectives (Why are we here? What does success look like?)
- Scope & Deliverables (What's included? Key outputs?)

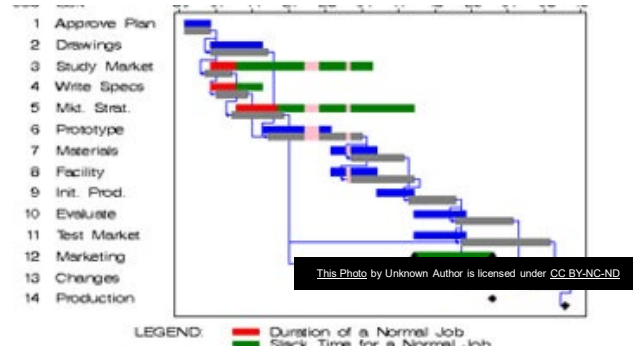
# Team & Operations

- ❖ Roles & Responsibilities (Who does what? Governance structure)
- ❖ Expectations & Norms (How do we work together?)
- ❖ Communication & Reporting (Meeting cadence, platforms, and reporting structure)



# Execution & Risk Management

- Timeline & Milestones (Key dates, sponsor deadlines)
- Risk Management (Top risks & mitigation strategies)
- Change Management (Handling scope changes)



		A	B	C	D	E
		Negligible	Minor	Moderate	Significant	Severe
E	Very Likely	Low Med	Medium	Med Hi	High	High
D	Likely	Low	Low Med	Medium	Med Hi	High
C	Possible	Low	Low Med	Medium	Med Hi	Med Hi

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# Next Steps & Strategic Outlook



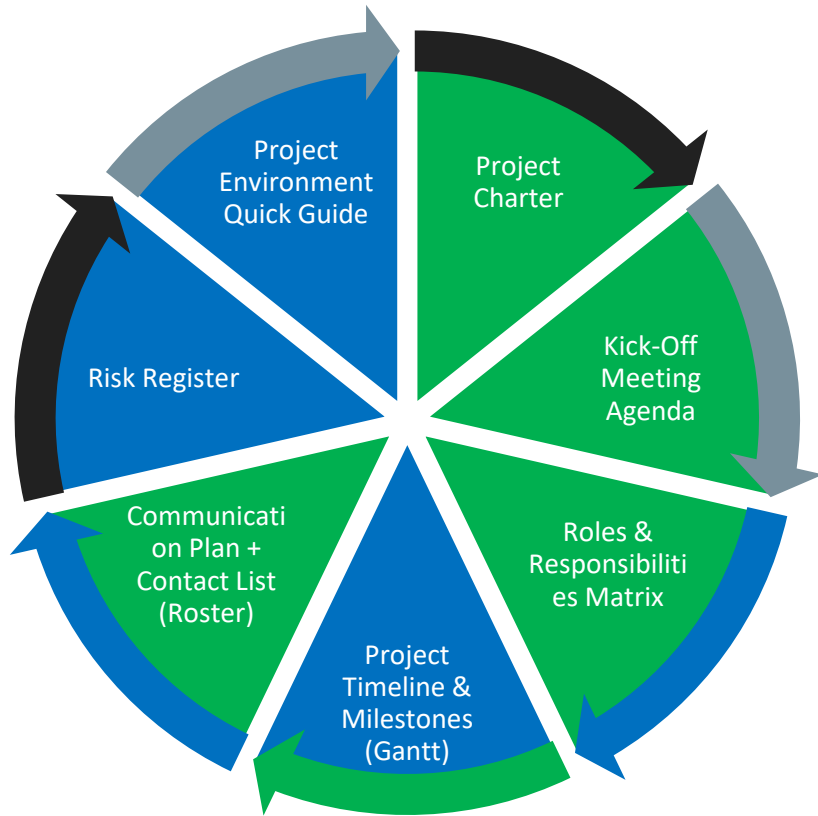
Strategy (Optional) (How does this align with broader goals?)



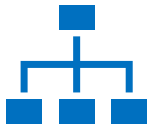
Next Steps & Q&A (Immediate action items & open discussion)

# Tools and Checklists for Kick-Offs

# Essential Tools



# Agenda Presentation Template



Slide deck with  
standard sections



Customize



Other  
considerations

# What is the biggest risk factor that can derail a research project early on?

- A. Unclear project scope and expectations**
- B. Lack of stakeholder engagement**
- C. Budget constraints**
- D. Poor communication and reporting structure**

# Addressing Early Risks and Dependencies

# Identifying Risks

- Risk Identification Checklist (Types)
  - Scope
  - Schedule
  - Resource
  - Technical
  - Stakeholder
  - Reputational
  - Financial



# Mitigating Dependencies



**Proactive Planning**



**Align Timelines**



**Build Contingency  
Buffers**



**Clear Ownership**



**Continuous  
Monitoring**



**Dependency  
Mapping**



**Communication  
Plan**

# **Adapting Kick-Off Strategies for Diverse Formats**

# Which format do you prefer for research project kick-off meetings?

- A. In-person
- B. Hybrid
- C. Fully remote
- D. It depends on the project

# In-Person, Hybrid, and Remote

## *Adapting agenda and communication approaches*

Format	Strengths	Challenges	Best Practices
In-Person	High engagement & relationship-building  Easier real-time discussions	Travel costs & logistics  Harder to include remote team members	Design interactive sessions  Provide clear documentation & post-meeting summaries
Hybrid	Balances in-person and remote needs  Increases inclusivity	Tech issues & inequitable participation  Time zone constraints	Use structured facilitation & clear agenda  Ensure equal participation with engagement tools
Remote	Cost-effective & accessible for all  Allows for easy documentation	Harder to foster personal connections  Potential for disengagement	Use breakout rooms & polls for interaction  Record sessions for follow-up

# Engaging Stakeholders

- ✓ Tone
- ✓ Techniques
- ✓ Stronger Collaborations



**In one word, what is the most critical factor  
for a successful project kick-off?**

# Summary/Q&A/Conclusion

- Align teams and objectives
- Effective communication and planning
- Tools and adaptability



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# Resources

*Connection, Community, Collaboration*

- Templates/Resources
- Toolkits
- Community Share / CU Boulder Kick-Off Slide Deck Template
- Umbrex Free Toolkit

**LinkedIn Group:**  
**Research Project  
Management Community**





**Thank you for  
your time!**