Client Kick-off Meeting: The Five Ps

Problem

Goal: What business problem needs to be solved?

- What business problem are you addressing? (***Tip***: Keep the client focused on describing the problem and not the presumed causes.)
- What's driving the problem? (***Tip***: Begin to explore the presumed causes.)
- Why does the problem have to be addressed now? (***Tip***: The answer to this question can drive timelines during the project and reinforce the value of getting the project done.)

Performance

Goal: What is the expected change in performance?

- How does employee performance relate to the business problem? (***Tip***: While discussing performance, encourage the client to describe observable behaviors instead of presumptions about what employees "understand" or "think.")
- Which groups/departments carry out the performance you want to address?
- Describe the current performance. (***Tip***: This is a broad request, but the goal is to keep reinforcing that the result of the learning intervention should ultimately be a change in what people "do," not just "know" or "understand.")
- Describe the performance you want to see. (***Tip***: Using the word "see" is important because it helps keep the discussion focused on *observable* outcomes.)

People

Goal: Who are the participants, sponsors, and SMEs?

- How large is the audience? Where are they located?
- Who will play the following roles? (***Tip***: You can also use a RASCI chart for this.)
  - Owner\Sponsor
  - Project Manager
  - Approver
  - Reviewer
  - Subject Matter Experts
  - Designer
  - Developer
- What are the prevailing attitudes toward addressing the business problem? What type of resistance should we anticipate?

Planning

Goal: What variables affect the timeline?

- What are the dependencies for this project?
- How stable is the content? When will it be stable?
- If the content includes software training, does the software currently exist? If so, is it being modified? How should those modifications factor into the training design and development timeline?
- Does training and/or documentation regarding this content currently exist?
- Do you have any of the following in place?
    - Overall project management methodology
    - Communication plan
    - Implementation plan
    - Risk analysis

  If **yes**, who's responsible for driving, tracking, and implementing them? If **not**, who's responsible for ***creating***, driving, tracking, and implementing them?

Parameters

Goal: What are the parameters within which we need to work?

- Design parameters
    - What is the optimal length of the course?
    - Is there a course standard template? (***Tip***: This question may yield too much detail for the initial meeting, but whether you need to create a template from scratch may affect your timelines and pricing.)
    - For instructor-led training, who will deliver the course? (***Tip***: Names aren't important here. What you want to know is the person's training experience. This may impact your design and surface the need to create a train-the-trainer or a facilitator guide.)
- Timing parameters
    - When does the behavioral change need to happen to affect the business problem? (***Tip***: The answers to these timing questions will help you begin to identify contingency plans for if the deadlines begin to slip. Simply asking whether the deadline is "firm or soft" does not help you much because you need to know the actual consequence of a delay.)
    - How does the date relate to the business problem?
    - Based on that date, when does the learning intervention need to take place? (***Tip***: This question may provide a more specific answer than merely asking, "What's the due date?" You're asking the client to tie the project due date to the business problem. It's better to do it now because it WILL come up later if dates begin to slip.)
    - What is the consequence of missing this date?
    - Does the content have to go through a legal approval process?