| Contract kick-off meeting (template) |  |
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# Introduction

The purpose of the kick-off meeting is to ensure mutual understanding of contract objectives by both the customer and the supplier. The kick-off meeting also aims to establish and agree communication, reporting, delegation of authorities, performance, operational and commercial issues relating to the contract.

The kick-off meeting should be organised as soon as practically possible after the contract award, minuted as per the template and copies distributed to all parties following the meeting.

The contract manager and supplier representative must attend the kick-off meeting.

Other representatives from the customer (or other buyers or impacted stakeholders under the contract with the supplier) and from the supplier should be present, e.g. contract owner, users, etc.

# Responsibilities

The contract manager is responsible for conducting the kick-off meeting. The contract administrator is responsible for scheduling and taking minutes as per the template and distributing the completed minutes to all parties.

*Note: Remove this introduction page when using the template.*

|  |  |
| --- | --- |
| Attended by | |
| **Customer (insert customer name)** | **Supplier (Insert name)** |
|  |  |
|  |  |
|  |  |

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| --- | --- | --- | --- |
| Kick-off meeting invite sent to | | | |
| **Name** | **Position** | **Department** | **Organisation** |
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| **Written By:**  [……….] | **Location:**  […………..] | **Tel. ext.**  [………] | **Date**  [………..] |

**Attachments: [……………………….]**

| Item No. | Action by and date | Description of discussions |
| --- | --- | --- |
|  |  | **Roles and key personnel** |
|  |  | Confirm key personnel and responsibilities of both the Customer and Supplier personnel |
|  |  |  |
|  |  | **Transition plan** |
|  |  | Key items for transition plan for the incoming Supplier |
|  |  | Contract management plan |
|  |  |  |
|  |  | **Compliance** |
|  |  | Leadership and commitment |
|  |  | Key objectives |
|  |  | Manpower, resources and competence assurance |
|  |  | Planning |
|  |  | Implementation and monitoring |
|  |  | Standards, procedures and document control |
|  |  | Management review and audits |
|  |  |  |
|  |  | **HSE (health, safety and environment)** |
|  |  | Key objectives |
|  |  |  |
|  |  | **Commercial** |
|  |  | Contract scope, specifications and drawings |
|  |  | Goods and services |
|  |  | Financial control (authorities and processes) |
|  |  | Variations and changes |
|  |  | Claims and disputes |
|  |  | Incentives and penalties |
|  |  |  |
|  |  | **Operational** |
|  |  | Timeline including milestones |
|  |  | Planned value of work |
|  |  | Resources (manpower, materials, equipment) |
|  |  | Key opportunities |
|  |  |  |
|  |  | **Performance** |
|  |  | Monitoring and schedule (meetings, field visits, inspections, reviews, audits) |
|  |  | Recording and reporting formats |
|  |  | KPI review meetings |
|  |  | KPI monitoring, recording and reporting process |
|  |  | Performance and relationship management process |
|  |  |  |
|  |  | **Relationship** |
|  |  | Organisation, reporting and escalation process |
|  |  | Issuing and authorising instructions and variations |
|  |  | Resolving claims and disputes |
|  |  | Technical, operational, commercial contacts |
|  |  | **Procure to Pay (purchasing)** |
|  |  | Purchase order/service entry |
|  |  | Invoice format/completeness/receipt and processing |
|  |  | Payment terms |
|  |  | Procure to Pay contact information |

**Signatures**

|  |  |  |  |
| --- | --- | --- | --- |
| For supplier | | For customer | |
| **Name:** |  | **Name:** |  |
| **Position:** |  | **Position:** |  |
| **Date:** |  | **Date:** |  |
| **Signature:** |  | **Signature:** |  |