Freshservice Implementation – Project Kickoff Agenda

Use this template to conduct your Freshservice implementation kickoff meeting. This agenda ensures alignment between project stakeholders, defines goals, and sets clear expectations for delivery.

# Meeting Details

• Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

• Time: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

• Duration: 60–90 minutes

• Location/Call Info: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

• Meeting Lead: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

# Kickoff Agenda

1. 1. Welcome and Introductions
2. 2. Review of Project Goals and Success Criteria
3. 3. Overview of Freshservice Implementation Scope
4. 4. Review of Implementation Methodology and Timeline
5. 5. Roles and Responsibilities (Client and Consultant)
6. 6. Communications Plan and Collaboration Tools (e.g., MS Teams, Email, Shared Drive)
7. 7. Discovery Phase Expectations
8. 8. Discussion of Key Business Units and Stakeholders
9. 9. Review of Initial Risks and Constraints (RAID Log introduction)
10. 10. Q&A Session
11. 11. Next Steps and Scheduling of Discovery Workshops

# Attendees

• Name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | Role \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | Department \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

• Name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | Role \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | Department \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

• Name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | Role \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | Department \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_