# Engagement Planning Meeting Agenda

The Engagement Planning Meeting is focused on aligning project logistics, confirming access and scheduling, and reviewing delivery expectations. This session ensures all stakeholders understand their roles and that the implementation will proceed according to the defined scope and cadence.

## Review Scope of Work and Deliverables

Owner: Project Manager

Present a summary of the signed Statement of Work (SOW) and clearly outline what deliverables are in scope. Clarify any out-of-scope activities and note any client-specific considerations.

## Confirm Engagement Schedule

Owner: Engagement Manager

Review the overall project timeline and phase breakdown. Discuss key delivery milestones and customer availability to avoid scheduling conflicts.

## Access Needs (Freshservice, Network, Systems)

Owner: System Admin

Ensure required system access is documented and will be provisioned to the consulting team in a timely manner. This includes Freshservice admin roles, network access, and credentials for integrations if applicable.

## Escalation Paths and Risk Management

Owner: Engagement Manager

Define how issues will be escalated during the project lifecycle. Identify known project risks and assign owners to monitor and mitigate them.

## Review Documentation Requirements

Owner: ITSM Lead

Establish the need for internal SOPs, process maps, and documentation for current-state workflows. Identify what artifacts must be delivered by the client.

## Plan for Initial Workshops

Owner: All stakeholders

Review upcoming workshops by module (Incident, Change, Asset, etc.) and confirm stakeholder availability. Assign preliminary roles for each session.