# Freshservice Planning Phase Meeting Agendas

## Kickoff Meeting

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| Agenda Item | Owner |
| Welcome and Introductions | All participants |
| Project Goals and Success Criteria | Project Sponsor |
| Roles and Responsibilities | Project Manager |
| Project Timeline and Milestones | Engagement Manager |
| Communication Plan and Meeting Cadence | Engagement Manager |
| Next Steps and Q&A | All participants |

## Engagement Planning

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| Agenda Item | Owner |
| Review Scope of Work and Deliverables | Project Manager |
| Confirm Engagement Schedule | Engagement Manager |
| Access Needs (Freshservice, Network, Systems) | System Admin |
| Escalation Paths and Risk Management | Engagement Manager |
| Review Documentation Requirements | ITSM Lead |
| Plan for Initial Workshops | All stakeholders |

## Business Objectives Review

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| Agenda Item | Owner |
| Identify Strategic ITSM Goals | ITSM Sponsor |
| Define Critical Success Factors | ITSM Sponsor |
| Review and Align on KPIs | Process Owner |
| Discuss ITIL Alignment (e.g., Change, Incident) | ITIL Advisor |
| Capture Known Challenges and Constraints | Project Manager |
| Finalize and Approve Planning Outputs | All participants |