BCP CHECKLIST FOR THE STARTUP MEETING/project initiation *(Adapt as needed)*

TOPIC		**WHO IS RESPONSIBLE**	**DATE COMPLETED AND NOTES**
Preparing for the meeting			
1	Collate team members' diaries		
2	Contact the client (see email template), and arrange date, time, and place for start-up		
3	Issue calendar invitation to all attendees		
4	Carry out background research		
5	Be clear on the task, and prepare list of questions to ask		
6	Create and issue an agenda		
7	Agree who will take notes at the meeting (best to rotate this for different meetings)		
8	Make transport arrangement and apply for travel budget if applicable		
	Establish/update your LinkedIn profile		
Carry out background research			
9	What can you find out from the client's website? (fill in the template..)		
	Find out about the industry		
	Check the social media of key people (client and others in the organisation). LinkedIn, FB, Twitter, Instagram, TikTok.		
On the day (amend if online)			
10	Double check transport arrangements		
11	Each team member to take a notebook and pen		
12	Keep any travel receipts for processing your claim		
13			
At the meeting			
14	Follow the agenda (suggested topics: introductions by all, client introduces project, discussion, and Q&A, agree project aim, next actions including date, time and location of next meeting, and people's availabilities)		
15	Bring a notebook and pen. Take notes (play back to client on screen to confirm key points)		
16	Take notes (everyone should be prepared to take notes; play back to client on screen to confirm key points)		
After the meeting			
17	Thank the client by email and send out minutes within 24 hrs to all attendees *(this should include a summary of when the team is available)*		

18	Get together as a team to review the meeting and its outcomes		
19			