

Kick-Off Meeting Checklist

Retrieval-Augmented Generation (RAG) Application

Melting Face
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The Pre-meeting Checklist

- ☐ Develop a list of invitees, including project sponsors, team members, and key stakeholders.
- ☐ Schedule a time and location for the meeting. Arrange for IT support if virtual.
- ☐ Send invitations at least 3 days prior to the meeting.
- ☐ Assign a note-taker to document key discussions and action items.
- ☐ Develop a detailed meeting agenda covering objectives, scope, timeline, and deliverables.
- ☐ Distribute the agenda at least 24 hours before the meeting.
- ☐ Prepare a sign-in sheet for attendees to capture their names and contact information.
- ☐ Send a meeting reminder the day before the meeting.

The Meeting Checklist

- ☐ Ensure all attendees sign in upon arrival.
- ☐ Introduce all participants, including their roles in the project.
- ☐ Present and review the agenda, covering the project's scope, objectives, deliverables, and success metrics.
- ☐ Discuss key project timelines and milestones.
- ☐ Outline communication methods and escalation procedures.

- ☐ Review success tracking mechanisms, including KPIs and reporting requirements.
- ☐ Open the floor for Q&A to clarify expectations and address concerns.
- ☐ Summarize action items, assigning responsibilities and deadlines.
- ☐ Announce the date for the next meeting, if known.

Notes

Non-agenda items to be addressed at a later time:

Post-Meeting Checklist

- ☐ Review and edit meeting minutes, including attendees and key discussion points.
- ☐ Distribute meeting minutes to all relevant stakeholders.
- ☐ Follow up on the status of assigned action items.
- ☐ Identify and plan follow-up actions for unresolved non-agenda items.
- ☐ Update the project plan if necessary and share revisions with the team.
- ☐ Schedule follow-up meetings if required.