# Creating a Project Kick-Off Canvas – Instructions for Participants

A "Project Canvassing" meeting is a structured brainstorming session used to launch a new project. The meeting engages key stakeholders into the strategic planning process and is used to build a solid foundation upon which the details of the project can later be planned and executed. It is used to understand the outcomes the project needs to achieve, to set the direction for the project and to understand what it will take to make the project a success.

During the meeting a "Project Kick-Off Canvas" (see page 3) is used to focus discussion. The canvas has sections for all of the key strategic decisions that need to be considered when a project first begins. The canvas is either: printed on very large format paper (often 3 feet by 4 feet), drawn up on a whiteboard or recreated using flip-chart paper. During the session the facilitator walks through the sections in the canvas and participants work together to generate ideas and make decisions. The session is intended to be an intense process. If everyone remains focused the meeting can often be completed in 60 minutes. The output of the meeting will be used to create a formal "Project Brief" (also known as a Project Charter) that will provide the overall framework and context for the project to proceed.

### Sections in the Kick-Off Canvas

The components discussed in the meeting are as follows:

1. **Desired outcomes –** Outcomes are the things a project is setting out to achieve. Outcomes should be things of value to the organization (and /or its customers). A project may directly achieve an outcome, or, position the organization so that the desired benefits can be attained following the project's completion. The desired outcomes are the "why" behind the project.
2. **Plan of attack –** A "high-level roadmap" that establishes how a project is to be approached. In most projects there are different ways of achieving the desired outcomes, the plan of attack establishes which of those options is to be pursued. The "Plan of Attack" is the project's high-level "how".
3. **Major deliverables and tasks –** Deliverables are the things created by a project. They may be physical in nature or more intangible. Tasks are the major pieces of work needing to be done to create the deliverables. Deliverables and tasks define a project's scope (i.e. "what is" and "what is not" a part of the project). Deliverables and tasks are the project's "what".
4. **Measures of success –** Knowing how the success of a project will eventually be judged allows meaningful objectives to be set. These objectives are often expressed as Key Success Indicators (KSI's) and should ideally be Specific, Measurable, Achievable, Relevant and Time-bound (i.e. SMART).
5. **Critical Success Factors (CSF) –** Factors whose presence in the project environment increases the chances of success and whose absence increases the chance of failure. Think about baking a cake. For a cake to be light and tasty you need fresh ingredients, the ingredients need to be properly mixed and you need an oven that can hold a stable temperature. Fresh ingredients, effective mixing and a good oven are all CSF's.
6. **Constraints –** Anything that limits the options available to the project team. Common examples include: laws and regulations, limits in the organizations capacity, resources or capabilities, available technology and available time and money.
7. **Stakeholders –** Stakeholders are people or groups who are either actively involved in the project, affected by the project or who have a stake or interest in its outcome. To increase the

The Kick-Off Canvas tool was developed by Calleam Consulting as part of the "Leading Projects Successfully" online Project Management course. To learn more visit us at www.calleam.com or use the QR code below.

chances of success stakeholders needs, wants and perceptions of the project need to be understood and accounted for.

8. **Risks and assumptions –** Risks are things that might go wrong. Assumptions are things the team takes to be true although there is no way of knowing for sure. Assumptions are a form of risk, because as we all know when you make assumptions there is a risk of the assumption turning out to be wrong.

### Overall Procedure for the Meeting

1. The facilitator starts the meeting by doing a quick review of the process and terminology used on the canvas to ensure everyone understands.
2. The Project Sponsor should provide a quick review of the background that lead up to this project being put forward and the overall context within which this project will fit.
3. The review starts by looking at the desired outcomes (number 1 on the canvas). The facilitator starts discussion by asking the group what it is they think the project should be trying to achieve. How could this project add value to the organization and how the project will be beneficial to the organization or its customers?
4. As the conversation develops the Project Manager moves through the sections on the canvas. Normally the meeting flows from 1) Desired outcomes through 2) Plan of attack, 3) Major deliverables & tasks, 4) Measures of success, 5) Critical success factors, 6) Constraints, 7) Stakeholders and 8) Risks and assumptions, however discussion is often non-linear and hence it is expected that at times conversation may move ahead or loopback if good points are raised.
5. As ideas are put forward they are written on yellow stickies and added to the appropriate section of the canvas. Items can be added or removed as the discussion unfolds and matures.
6. If there are issues or questions raised that cannot be answered immediately during the meeting they will be put in the "parking lot" area. To keep the flow going try not to get bogged down in issues that cannot be resolved there and then in the meeting. The parking lot will be used to ensure these items don't get forgotten about.
7. At the end of the meeting items in the parking lot will be reviewed. Where appropriate action items will be assigned to ensure follow up on the issues.

In many projects it is best to divide the process into two rounds. The first round is a brainstorming round that focuses on generating alternate ideas. The second round is a decision-making round in which the ideas are evaluated and decisions are made about which ideas to adopt. In the first round stickies will be added for each idea. In the second round, those ideas that get rejected will be removed from the canvas, leaving only the firm decisions that have been made.

### Basic Ground Rules

To maximize the value created the meeting needs to focus on big-ticket items and strategic decisions only. Try not to get bogged down in details. In addition remember that the session is a brainstorming session, so the basics of brainstorming apply. Just a reminder to everyone:

1. Be inventive, be creative and go beyond the obvious
2. Try and build on each others ideas rather than promoting only your own
3. Where you are building on someone else's idea or inspired by it, credit them as you explain your additional thoughts
4. Don't hog the stage, allow everyone equal opportunity to speak
5. Don't get defensive if someone else puts out an idea that is in conflict with your own
6. Be as brief as you can when putting forward your ideas, avoid going into details that might detract from the focus on big-picture discussion
7. Respect the opinions of others, respect the direction given by the facilitator and work towards making the meeting a success.

  

## The "Kick-Off Canvas"

| Project Kick-Off Canvas | Project: | Version: | Date: | Session participants: |
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### 1) Desired outcomes

*What do we want to achieve?*
*How will things be better or different after the project?*
*What are the benefits we are trying to get?*

*Consider affect on - Business performance, customer, staff, organizational capabilities, environment, competitiveness, etc.*

### 2) Plan of attack

*How will we achieve the desired outcomes?*
*What is our strategy?*
*What are the major steps along the way?*
*What alternatives are there?*
*Which alternative might be best?*
*What are the priorities?*

*Focus on being creative & thinking not only of how, but how best.*

### 3) Major deliverables & tasks

*What will this project produce?*
*What are the major components to be created?*
*What do we need to deliver?*
*Where are the scope boundaries?*

*Consider physical outputs as well as intangibles.*

### 7) Stakeholders

*Who will benefit from this project?*
*Who will use or consume the deliverables?*
*Who needs to be a part of the project?*
*Who will be affected during or after the project?*
*Who needs to be kept informed?*

### 5) Critical success factors

*What will it take to make this project a success?*

*Consider - skills, relationships, technical factors, communications, support (buy-in), timing or any factor that may help ensure success.*

### 4) Measures of success

*How will success be judged?*
*How could we express the desired outcomes as objectives?*
*What are our targets?*

*Aim for SMART goals (Specific, Measurable, Achievable, Relevant and Time-bound).*

### 6) Constraints

*Are there any limits?*
*When does this need to be done by?*
*How much money is available?*
*Are there any laws or regulations we need apply?*

*Consider if there are any ways around the constraints.*

### 8) Risks & assumptions

*What might go wrong?*
*What assumptions are we basing our plan on?*
*What happens if those assumptions are wrong?*
*How risky are the assumptions?*
*Can the plan of attack be modified to reduce risk?*

### Parking lot) Issues, roadblocks & outstanding questions

*Use this area to record items needing follow up or details you want to keep track off, but don't want to discuss in full during the meeting.*



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