



NAC Executive Insights

Project Kick-Off for Large Complex Projects

Key Points

- Large complex projects require strong foundations.
- A day at the beginning of a project is just as valuable as a day at the end.
- Strong project foundations are built during project kick-off, which typically is considered the first 90 days of a project.
- Vertical kick-off is enabled by the use of a dedicated kick-off team.
- Project kick-off should consider lessons learned on other projects.

Introduction

This Executive Insight addresses project kick-off for three general types of contracts:

1. Pure design or engineering contracts typically performed for the owner.
2. Design/build (D/B) contracts performed for the owner, but recognizes that engineering may be undertaken by an engineering subcontractor within the D/B team.
3. Pure construction contract.

The underlying philosophy in this Executive Insight is one of a vertical kick-off built on strong foundations. The use of a dedicated project kick-off team is recommended. In this Insight, the potential scope of such a team is reflected by items presented in *italics*. The scope may be larger or smaller; the italicized highlights are intended to suggest possibilities and to underscore the concept of a project kick-off team.

The kick-off period may be thought of as the first 90 days at the beginning of the project, although in some fast-track projects this period may be significantly shorter. At the bid stage a project kick-off schedule should be prepared as a sanity check on the overall schedule and as a way to confirm scope has been comprehensively addressed.

The table in this Insight is best read column by column for the particular contract type envisioned.

Contracts and projects have an infinite variety, and as such this should be viewed as a starting point.

This Insight is best used in conjunction with the various lessons learned NAC Executive insights.

Select Project Kickoff Activities for Various Contract Types

	Design/Engineering Project	Design/Build Project	Construction Project
Alignment with Owner	Confirm owner's strategic business objectives (SBOs) with owner's executive.	Confirm owner's SBOs with owner's executive.	Confirm owner's SBOs with owner's executive.
	Confirm agreement with SBOs by internal stakeholders.	Confirm agreement with SBOs by internal stakeholders.	Confirm agreement with SBOs by internal stakeholders.
	Confirm agreement with SBOs by key external stakeholders and note gaps.	Confirm agreement with SBOs by key external stakeholders and note gaps.	Confirm agreement with SBOs by key external stakeholders and note gaps.
	Agree SBO-focused key performance indicators (KPIs).	Agree SBO-focused KPIs.	Agree SBO-focused KPIs.
	Involve owner in communication of SBOs to project team.	Involve owner in communication of SBOs to project team.	Involve owner in communication of SBOs to project team.
	Agree and document required owner approvals and timeframes (per contract).	Agree and document required owner approvals and timeframes (per contract).	Agree and document required owner approvals and timeframes (per contract).
	<i>Agree and document required submissions (per contract) and distribution to owner staff.</i>	<i>Agree and document required submissions (per contract) and distribution to owner staff.</i>	<i>Agree and document required submissions (per contract) and distribution to owner staff.</i>
	<i>Agree management reporting format based on standard project reports.</i>	<i>Agree management reporting format based on standard project reports.</i>	<i>Agree management reporting format based on standard project reports.</i>
	<i>Agree invoicing process, including timing, format and handling of exceptions.</i>	<i>Agree invoicing process, including timing, format and handling of exceptions.</i>	<i>Agree invoicing process, including timing, format and handling of exceptions.</i>
	Agree change order process, required documentation, and requirements for timely disposition.	Agree change order process, required documentation, and requirements for timely disposition.	Agree change order process, required documentation, and requirements for timely disposition.
	<i>Submit and confirm satisfaction with required bonds.</i>	<i>Submit and confirm satisfaction with required bonds.</i>	<i>Submit and confirm satisfaction with required bonds.</i>
	<i>Submit and confirm satisfaction with required technology (process and/or execution technologies) licenses and corporate documentation.</i>	<i>Submit and confirm satisfaction with required technology (process and/or execution technologies) licenses and corporate documentation.</i>	<i>Submit and confirm satisfaction with required technology (process and/or execution technologies) licenses and corporate documentation.</i>
	<i>Submit and confirm satisfaction with required insurance certificates.</i>	<i>Submit and confirm satisfaction with required insurance certificates.</i>	<i>Submit and confirm satisfaction with required insurance certificates.</i>

Select Project Kickoff Activities for Various Contract Types

	<i>Confirm completion and satisfaction with any forms or agreements incorporated in proposal or contract.</i>	<i>Confirm completion and satisfaction with any forms or agreements incorporated in proposal or contract.</i>	<i>Confirm completion and satisfaction with any forms or agreements incorporated in proposal or contract.</i>
	Agree and document any owner governance processes not otherwise addressed.	Agree and document any owner governance processes not otherwise addressed.	Agree and document any owner governance processes not otherwise addressed.
Alignment with JV Partners (if any)	Issue and obtain agreement on JV Board charter, reporting, and powers reserved.	Issue and obtain agreement on JV Board charter, reporting, and powers reserved.	Issue and obtain agreement on JV Board charter, reporting, and powers reserved.
	Define any JV Board subcommittees, roles, and responsibilities.	Define any JV Board subcommittees, roles, and responsibilities.	Define any JV Board subcommittees, roles, and responsibilities.
	Issue updated JV agreement to all JV members.	Issue updated JV agreement to all JV members.	Issue updated JV agreement to all JV members.
	<i>Establish JV banking relationships and signatories.</i>	<i>Establish JV banking relationships and signatories.</i>	<i>Establish JV banking relationships and signatories.</i>
	<i>Execute any agreed to JV insurance programs.</i>	<i>Execute any agreed to JV insurance programs.</i>	<i>Execute any agreed to JV insurance programs.</i>
	Establish and issue policy on JV Board communication with owner.	Establish and issue policy on JV Board communication with owner.	Establish and issue policy on JV Board communication with owner.
	Establish and issue policy on JV Board communication with project team.	Establish and issue policy on JV Board communication with project team.	Establish and issue policy on JV Board communication with project team.
	<i>Establish JV policy on external communications.</i>	<i>Establish JV policy on external communications.</i>	<i>Establish JV policy on external communications.</i>
	Execute any multi-party labor agreements (limited for engineering only contracts).	Execute any multi-party labor agreements.	Execute any multi-party labor agreements.
	<i>Identify any third party legal counsel for JV.</i>	<i>Identify any third party legal counsel for JV.</i>	<i>Identify any third party legal counsel for JV.</i>
	<i>Establish audit policy and select outside audit firm.</i>	<i>Establish audit policy and select outside audit firm.</i>	<i>Establish audit policy and select outside audit firm.</i>
	Establish and issue JV safety policy.	Establish and issue JV safety policy.	Establish and issue JV safety policy.
	Review and confirm project risk register from JV perspective (JV Risk Register).	Review and confirm project risk register from JV perspective (JV Risk Register).	Review and confirm project risk register from JV perspective (JV Risk Register).
	Assign and mobilize key members of project team.	Assign and mobilize key members of project team.	Assign and mobilize key members of project team.
	Authorize and deploy Project Kick-Off Team.	Authorize and deploy Project Kick-Off Team.	Authorize and deploy Project Kick-Off Team.

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	<i>Establish and implement intellectual property rights agreement.</i>	<i>Establish and implement intellectual property rights agreement.</i>	<i>Establish and implement intellectual property rights agreement.</i>
	Best practices and lessons learned reviewed	Best practices and lessons learned reviewed	Best practices and lessons learned reviewed
Project Management Standup and Initiation	Prepare prime contract summary, obtain JV Board or company concurrence and issue to project team.	Prepare prime contract summary, obtain JV Board or company concurrence and issue to project team.	Prepare prime contract summary, obtain JV Board or company concurrence and issue to project team.
	Conduct initial project kick-off meeting.	Conduct initial project kick-off meetings. Initial meeting with entire D/B team followed by separate meeting of design and construction teams.	Conduct initial project kick-off meeting.
	<i>Establish project team communication protocol and initial distribution lists.</i>	<i>Establish project team communication protocol and initial distribution lists.</i>	<i>Establish project team communication protocol and initial distribution lists.</i>
	Conduct listening session with owner staff on project background to uncover any otherwise undisclosed concerns or information.	Conduct listening session with owner staff on project background to uncover any otherwise undisclosed concerns or information.	Conduct listening session with owner staff on project background to uncover any otherwise undisclosed concerns or information.
	Establish schedule of face-to-face meetings with owner.	Establish schedule of face-to-face meetings with owner.	Establish schedule of face-to-face meetings with owner.
	Schedule and conduct initial Project Steering Committee (JV Board) meeting.	Schedule and conduct initial Project Steering Committee (JV Board) meeting.	Schedule and conduct initial Project Steering Committee (JV Board) meeting.
	Best practices and lessons learned reviewed	Best practices and lessons learned reviewed	Best practices and lessons learned reviewed
Technology Selection	Identify and confirm selection of any proprietary process technologies (whether owner or third party provided) to be used including any usage limitations and intellectual property requirements.	Identify and confirm selection of any proprietary process technologies (whether owner or third party provided) to be used including any usage limitations and intellectual property requirements.	Identify any proprietary process technologies to be used including any usage limitations and intellectual property requirements.
	Identify any engineering provider process technologies specifically included under contract with owner and any limitations or intellectual property requirements.	Identify any engineering provider process technologies specifically included under contract with owner as part of the design/build contract and any limitations or intellectual property requirements.	Identify any proprietary process technologies to be used including any usage limitations and intellectual property requirements.
	Identify and confirm selection of any project management/	Identify and confirm selection of any project management/	Identify and confirm selection of any project management related

Select Project Kickoff Activities for Various Contract Types

	design/engineering related proprietary or third party licensed technology (hardware and software) to be used in any engineering analysis, design development, building information model (BIM), GIS, asset management system and project management system. This includes any specialized hardware for collection (laser scanning, drones, LIDAR, etc.), storage (cloud, remote and backup) and access and communication.	design/engineering related proprietary or third party licensed technology (hardware and software) to be used in any engineering analysis, design development, building information model (BIM), GIS, asset management system and project management system. This includes any specialized hardware for collection (laser scanning, drones, LIDAR, etc.), storage (cloud, remote and backup) and access and communication.	proprietary or third party licensed technology (hardware and software) to be used.
		Identify and confirm selection of any construction or construction management related proprietary or third party licensed technology (hardware and software) to be used in construction activities. This includes any specialized proprietary hardware and systems for physical construction of the project.	Identify and confirm selection of any construction or construction management related proprietary or third party licensed technology (hardware and software) to be used in construction activities. This includes any specialized proprietary hardware and systems for physical construction of the project.
	Identify and confirm and initiate implementation of any cybersecurity requirements for the project.	Identify and confirm and initiate implementation of any cybersecurity requirements for the project.	Identify and confirm and initiate implementation of any cybersecurity requirements for the project.
<u>Scope</u>	Prepare project scope summary delineating items not in scope and who is responsible and issue to client for concurrence; issue to project team as baseline scope upon client concurrence. Advise JV Board or company management of any variance from proposal.	Prepare project scope summary delineating items not in scope and who is responsible and issue to client for concurrence; issue to project team as baseline scope upon client concurrence. Advise JV Board or company management of any variance from proposal.	Prepare project scope summary delineating items not in scope and who is responsible and issue to client for concurrence; issue to project team as baseline scope upon client concurrence. Advise JV Board or company management of any variance from proposal.
-	Issue Change Control Process to project team.	Issue Change Control Process to project team. Change control process is with respect to prime contract with owner. Change control with respect	Issue Change Control Process to project team.

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		to engineering subcontract to constructor will use a compatible and supporting process. D/B contractor needs to pay attention to timeliness of notices since clock may begin with notice to contractor by engineer.	
-	Document all elements required for a “complete” project which are not within the prescriptive scope and confirm they are to be provided by the owner or through another contract.	Document all elements required for a “complete” project which are not within the prescriptive scope and confirm they are to be provided by the owner or through another contract. Similarly confirm scope completeness if a performance- or outcomes-based scope.	Document all elements required for a “complete” project which are not within the prescriptive scope and confirm they are to be provided by the owner or through another contract.
<u>Project Kick-Off</u>	Issue client with a schedule of project startup/kick-off approvals required.	Issue client with a schedule of project startup/kick-off approvals required. Engineering subcontract may require additional approvals from contractor who is their direct client.	Issue client with a schedule of project startup/kick-off approvals required.
<u>Risk</u>	Review and update risk register and issue as project baseline. Advise JV Board or company management of any variance from proposal.	Review and update risk register and issue as project baseline. Advise JV Board or company management of any variance from proposal.	Review and update risk register and issue as project baseline. Advise JV Board or company management of any variance from proposal.
	Identify high impact events for risk tracking whether provision has been made in risk assessment or not. Similarly track even if mitigated by contract or insurance. Rerun risk analysis with a “fat tail” distribution.	Identify high impact events for risk tracking whether provision has been made in risk assessment or not. Similarly track even if mitigated by contract or insurance. Rerun risk analysis with a “fat tail” distribution.	Identify high impact events for risk tracking whether provision has been made in risk assessment or not. Similarly track even if mitigated by contract or insurance. Rerun risk analysis with a “fat tail” distribution.
	Create or update assumption register linked to project baselines.	Create or update assumption register linked to project baselines.	Create or update assumption register linked to project baselines.
	Identify and address any Black Elephants	Identify and address any Black Elephants	
<u>Schedule</u>	<i>Update startup 30-, 60-, 90-day schedule; initiate rolling 90-day schedule</i>	<i>Update startup 30-, 60-, 90-day schedule; initiate rolling 90-day schedule</i>	<i>Update startup 30-, 60-, 90-day schedule; initiate rolling 90-day schedule</i>

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	<i>Establish and confirm baseline schedule and initial staffing plan.</i>	<i>Establish and confirm baseline schedule and initial staffing plan.</i>	<i>Establish and confirm baseline schedule and initial staffing plan.</i>
	Ensure sufficient granularity around any actions required to support early deliverables or decision points.	Ensure sufficient granularity around any actions required to support early deliverables or decision points. Concurrent engineering with construction changes the sequence of design.	Ensure sufficient granularity around any actions required to support early deliverables or decision points.
		Identify permits, ROW, and utility relocations required by each construction package and program and schedule each item as a separate task.	Identify permits, ROW, and utility relocations required by each construction package and program and schedule each item as a separate task
		Prepare submission schedule to each affected agency and utility to ensure awareness of timing of packages to be submitted and their priority.	Prepare submission schedule to each affected agency and utility to ensure awareness of timing of packages to be submitted and their priority.
	Update contract Master Schedule, reflecting any changes since original submission including any changes in seasonality. Issue as Schedule baseline.	Update contract Master Schedule, reflecting any changes since original submission including any changes in seasonality. Issue as Schedule baseline.	Update contract Master Schedule, reflecting any changes since original submission including any changes in seasonality. Issue as Schedule baseline.
	Initiate review of schedule precedencies and concurrencies.	Initiate review of schedule precedencies and concurrencies.	Initiate review of schedule precedencies and concurrencies.
	Initiate development of progressively detailed Work Breakdown Structure (WBS) identifying major work packages and deliverables	Initiate development of progressively detailed WBS identifying major work packages and deliverables	Initiate development of progressively detailed WBS identifying major work packages and deliverables
	Add any schedule-related assumptions to assumption register for tracking.	Add any schedule-related assumptions to assumption register for tracking.	Add any schedule-related assumptions to assumption register for tracking.
	Ensure all required/desired reviews (EH&S; Constructability; O&M; stagegate; risk; FMEA) are reflected on project schedule and any client review periods and approval/concurrence clearly delineated.	Ensure all required/desired reviews (EH&S; Constructability; O&M; stagegate; risk; FMEA) are reflected on project schedule and any client review periods and approval/concurrence clearly delineated.	Ensure all required/desired reviews (EH&S; Construction means and methods) are reflected on project schedule and any client review periods and approval/concurrence clearly delineated.

Select Project Kickoff Activities for Various Contract Types

	Prepare calendar of client-required approvals and timing on a rolling basis.	Prepare calendar of client-required approvals and timing on a rolling basis. For engineering client, this includes both contractor and owner.	Prepare calendar of client required approvals and timing on a rolling basis.
<u>Estimates (engineering; CAPEX)</u>	Review and update estimate for any gaps or deficiencies.	Review and update estimate for any gaps or deficiencies.	Review and update estimate for any gaps or deficiencies.
	Initiate development of a detailed estimate of indirect costs/out-of-pocket expenses born by the project.	Initiate development of a detailed estimate of indirect costs/out-of-pocket expenses born by the project.	Initiate development of a detailed estimate of indirect costs/out-of-pocket expenses borne by the project.
	Review risk and contingency amounts in light of updates to other project baselines.	Review risk and contingency amounts in light of updates to other project baselines. Reviews include those related to both the engineering effort as well as the overall D/B contract.	Review risk and contingency amounts in light of updates since bid submittal.
	Establish project cost baseline.	Establish project cost baseline.	Establish project cost baseline.
	Add key estimate assumptions to assumption register for tracking.	Add key estimate assumptions to assumption register for tracking.	Add key estimate assumptions to assumption register for tracking.
	Allocate budgets to responsible organizational elements of subcontractors.	Allocate budgets to responsible organizational elements of subcontractors.	Allocate budgets to responsible organizational elements of subcontractors.
<u>Execution</u>	Issue Project Charter and consolidated project baseline.	Issue Project Charter and consolidated project baseline. Project baseline will include both an engineering baseline, including an expanded basis of design as well as all elements of a construction baseline.	Issue Project Charter and consolidated project baseline.
	Prepare and issue project execution plan and execution processes.	Prepare and issue project execution plan and execution processes. These will include an overall D/B plan, which may incorporate the engineering equivalent. Alternately, engineering may issue its own plan and processes for dealing with engineering aspects and defining how it	Prepare and issue project execution plan and execution processes.

Select Project Kickoff Activities for Various Contract Types

		will operate with respect under its subcontract.	
	Update and issue Responsible, Accountable, Consulted, Informed (RACI) matrix.	Update and issue RACI matrix. This will include engineering activities as well as construction activities and may reflect elements of review or approval from the engineering parent organization.	Update and issue RACI matrix.
	<i>Establish project reporting and reports process and procedures; initiate project controls manual; initiate project control.</i>	<i>Establish project reporting and reports process and procedures; initiate project controls manual; initiate project control. Reporting and control of engineering activities may include elements beyond what is only required in the D/B context.</i>	<i>Establish project reporting and reports process and procedures; initiate project controls manual; initiate project control.</i>
	<i>Issue safety and ethics statements and implement required training; initiate any required safety manual.</i>	<i>Issue safety and ethics statements and implement required training; initiate any required safety manual.</i>	<i>Issue safety and ethics statements and implement required training; initiate any required safety manual.</i>
	Conduct initial project team alignment sessions.	Conduct initial project team alignment sessions.	Conduct initial project team alignment sessions.
	Conduct initial Value Improvement Workshop.	Conduct initial Value Improvement Workshop.	Conduct initial Value Improvement Workshop.
Project Administration	<i>Obtain/establish project office (if any).</i>	<i>Obtain/establish project office (if any).</i>	<i>Obtain/establish project office (if any).</i>
	<i>Standup project IT system and processes; create and issue digital technology plan; issue list of approved software and obtain necessary licenses; create any required user accounts.</i>	<i>Standup project IT system and processes; create and issue digital technology plan; issue list of approved software and obtain necessary licenses; create any required user accounts.</i>	<i>Standup project IT system and processes; create and issue digital technology plan; issue list of approved software and obtain necessary licenses; create any required user accounts.</i>
	<i>Implement any required project intranet.</i>	<i>Implement any required project intranet.</i>	<i>Implement any required project intranet.</i>

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	<i>Initiate any external website development and obtain any owner approvals.</i>	<i>Initiate any external website development and obtain any owner approvals.</i>	<i>Initiate any external website development and obtain any owner approvals.</i>
	<i>Prepare and implement a cybersecurity plan.</i>	<i>Prepare and implement a cybersecurity plan.</i>	<i>Prepare and implement a cybersecurity plan.</i>
	<i>Standup document control processes and procedures.</i>	<i>Standup document control processes and procedures.</i>	<i>Standup document control processes and procedures.</i>
	<i>Establish log and tracking of any owner-provided materials.</i>	<i>Establish log and tracking of any owner-provided materials. For the engineering subcontractor this would include anything furnished to them by the design-builder.</i>	<i>Establish log and tracking of any owner-furnished materials, tools or equipment.</i>
	<i>Standup project purchasing organization, process, and procedures.</i>	<i>Standup project purchasing organization, process, and procedures.</i>	<i>Standup project purchasing organization, process, and procedures.</i>
	<i>Negotiate and execute any early/ long lead procurements including pre-agreed subcontractors</i>	<i>Negotiate and execute any early/ long lead procurements including pre-agreed subcontractors</i>	<i>Negotiate and execute any early/ long lead procurements including pre-agreed subcontractors</i>
	<i>Implement project safety and security during initial standup mobilization if required.</i>	<i>Implement project safety and security during initial standup mobilization if required.</i>	<i>Implement project safety and security during initial standup mobilization if required.</i>
	<i>Standup BIM model process, procedures, and access requirements and privileges for the Common Data Environment.</i>	<i>Standup BIM model process, procedures, and access requirements and privileges for the Common Data Environment.</i>	<i>Obtain necessary hardware, software, and system access to utilize project BIM model. Ensure appropriate privilege levels and mutually protective IP agreements.</i>
	<i>Update staffing plan and initiate recruitment</i>	<i>Update staffing plan and initiate recruitment</i>	<i>Update staffing plan and initiate recruitment</i>
	<i>Draft initial Project Orientation Guide</i>	<i>Draft initial Project Orientation Guide</i>	<i>Draft initial Project Orientation Guide</i>
	<i>Establish any project specific labor agreements or contracts required</i>	<i>Establish any project specific labor agreements or contracts required</i>	<i>Establish any project specific labor agreements or contracts required</i>
	<i>Implement time collection processes and procedures.</i>	<i>Implement time collection processes and procedures.</i>	<i>Implement time collection processes and procedures.</i>
	<i>Initiate any surveying or boring contracts.</i>	<i>Initiate any surveying or boring contracts.</i>	<i>Initiate any surveying or boring contracts.</i>
	<i>Standup and implement billings and payments until final organization in place. (In JV this may initially be done by managing partner).</i>	<i>Standup and implement billings and payments until final organization in place. (In JV this may initially be done by managing partner). Establish process and procedures for any engineering subcontractor billings.</i>	<i>Standup and implement billings and payments until final organization in place. (In JV this may initially be done by managing partner).</i>

Select Project Kickoff Activities for Various Contract Types

	Identify any contract required notice or action requirements and educate project team.	Identify any contract required notice or action requirements and educate project team.	Identify any contract required notice or action requirements and educate project team.
	Prepare first client notice (when required)	Prepare first client notice (when required). In D/B arrangement this would include notice to D/B contractor for changes outside of scope directed by contractor, whether originating from or a result of owner directed or caused changes.	Prepare first client notice (when required).
	<i>Establish and implement any document classification system (confidential; proprietary; secret; privileged legal document; trade secret).</i>	<i>Establish and implement any document classification system (confidential; proprietary; secret; privileged legal document; trade secret).</i>	<i>Establish and implement any document classification system (confidential; proprietary; secret; privileged legal document; trade secret).</i>
	Initial identification of training needs.	Initial identification of training needs.	Initial identification of training needs.
	<i>Implement knowledge management including establishment of project library with all available project information.</i>	<i>Implement knowledge management including establishment of project library with all available project information. Separately, various D/B players will require access to their respective parent knowledge management systems.</i>	<i>Implement knowledge management including establishment of project library with all available project information.</i>
	Best practices and lessons learned reviewed	Best practices and lessons learned reviewed	Best practices and lessons learned reviewed
Stakeholders	Confirm responsibilities with respect to stakeholders with owner and obtain concurrence on understanding.	Confirm responsibilities with respect to stakeholders with owner and obtain concurrence on understanding.	Confirm responsibilities with respect to stakeholders with owner and obtain concurrence on understanding.
	<i>Compile/issue master stakeholder list including contact information.</i>	<i>Compile/issue master stakeholder list including contact information.</i>	<i>Compile/issue master stakeholder list including contact information.</i>
	Prepare summary of stakeholder commitments made by owner and obtain owner concurrence.	Prepare summary of stakeholder commitments made by owner and obtain owner concurrence.	Prepare summary of stakeholder commitments made by owner and obtain owner concurrence.
	Create register of issues by stakeholder noting common issues and conflicts.	Create register of issues by stakeholder noting common issues and conflicts.	Create register of issues by stakeholder noting common issues and conflicts.

Select Project Kickoff Activities for Various Contract Types

	Develop strategy and initial plan for stakeholder engagement and confirm roles and responsibilities with owner.	Develop strategy and initial plan for stakeholder engagement and confirm roles and responsibilities with owner.	Typically, an Owner responsibility but as required develop strategy and initial plan for stakeholder engagement and confirm roles and responsibilities with owner.
	Prepare stakeholder information above for both internal and external stakeholders.	Prepare stakeholder information above for both internal and external stakeholders.	As required, prepare stakeholder information above for both internal and external stakeholders.
	Schedule initial stakeholder listening sessions with all stakeholders.	Schedule initial stakeholder listening sessions with all stakeholders.	Schedule initial stakeholder listening sessions with all stakeholders, in conjunction with other owner-driven stakeholder activities.
	Best practices and lessons learned reviewed	Best practices and lessons learned reviewed	Best practices and lessons learned reviewed
Engineering	Establish an expanded basis of design (Business Basis of Design).	Establish an expanded basis of design (Business Basis of Design).	Review engineering basis of design for construction-impacting elements.
	Establish quality requirements, QC, and QA processes.	Establish quality requirements, QC, and QA processes.	Review quality of design documents received and initiate addressing any systemic issues.
	Establish design margin tables.	Establish design margin tables.	Review adequacy of design margins for transient/temporary loads during construction, startup, or commissioning.
	<i>Establish required BIM environment with attendant policies, process, procedures and privileges.</i>	<i>Establish required BIM environment with attendant policies, process, procedures and privileges.</i>	<i>Access to required BIM environment with attendant policies, process, procedures and privileges. Integrate/interface any contractor specific BIM tools or programs.</i>
	Review design libraries and catalogs for potential design reuse.	Review design libraries and catalogs for potential design reuse.	Identify any reused design elements and availability of pre-existing construction or erection plans or lessons learned.
	Prepare initial draft of project standards.	Prepare initial draft of project standards.	Prepare initial draft of project and construction standards; go-bys, instructions, and checklists.
	Develop interface management matrix.	Develop interface management matrix.	Develop interface management matrix or confirm items on an owner-provided matrix.

Select Project Kickoff Activities for Various Contract Types			
	Identify long lead equipment.	Identify long lead equipment.	Identify long lead equipment and initiate procurement or, if separately ordered by owner, confirm status.
	Best practices and lessons learned reviewed	Best practices and lessons learned reviewed	Best practices and lessons learned reviewed
Construction			<i>Procure and install project signage.</i>
	Best practices and lessons learned reviewed	Best practices and lessons learned reviewed	Best practices and lessons learned reviewed
		Establish value of time.	Establish value of time.
<u>General Conditions</u>		Prepare and issue initial site general arrangements.	Obtain final General Arrangements to facilitate construction planning.
		<i>Initial site traffic plan</i>	<i>Initial site traffic plan</i>
		Initial laydown, storage, and warehousing plan and implementation.	Initial laydown, storage, and warehousing plan and implementation.
		<i>Initial plan and implementation for administrative/ office facilities.</i>	<i>Initial plan and implementation for administrative/ office facilities.</i>
		Initial plan and layout of shop and maintenance facilities. Implement as required.	Initial plan and layout of shop and maintenance facilities. Implement as required.
		Initial project logistics plan and offsite areas	Initial project logistics plan and offsite areas
		<i>Initial labor and crew-related facilities plan and implementation.</i>	<i>Initial labor and crew-related facilities plan and implementation.</i>
		<i>Estimate of Indirect Field Costs prepared or updated</i>	<i>Estimate of Indirect Field Costs updated</i>
			Initial fleet plan and procurement.
		<i>Initial site fencing and security implemented.</i>	<i>Initial site fencing and security implemented.</i>
		<i>Plan temporary site services implemented (water, waste (solid and liquid), commissary).</i>	<i>Temporary site services implemented (water, waste (solid and liquid), commissary).</i>
		Project HSE stood up and operational	Project HSE stood up and operational
		<i>Time control for craft in place.</i>	<i>Time control for craft in place.</i>
<u>Construction Planning</u>			Cataloging and review of engineering drawings noting status and quality
			<i>Onsite access to BIM model</i>

Select Project Kickoff Activities for Various Contract Types

			Initial construction work areas and work package definition
			Construction equipment plan
			Rough grading plan complete and rough grading initiated
			Foundation excavation plan initiated
		<i>Modularization strategy initiated.</i>	<i>Modularization strategy initiated.</i>
		<i>Supplier prequalification/ shop audit plan</i>	<i>Supplier prequalification/ shop audit plan</i>
			Initiate startup and commissioning plan.
			Initiate system turnover identification and packaging.
			Establish turnover documentation requirements.
<u>Construction Technology</u>		<i>Construction technology plan initiated.</i>	Construction technology plan completed.
			Materials testing plan completed and vendors engaged
<u>Construction</u>		Initiate initial clearing and grubbing	Initiate initial clearing and grubbing
		<i>Identify and protect surveying and other monuments.</i>	<i>Identify and protect surveying and other monuments.</i>
		Identify and initiate additional borings and soil testing	Identify and initiate additional borings and soil testing
		Establish initial environmental controls (dust, noise, erosion and pollution)	Establish initial environmental controls (dust, noise, erosion and pollution)
		Rough grading initiated	Rough grading initiated
		Temporary roads and parking lots well underway	Temporary roads and parking lots well underway
			Utility trenches identified and initiated where possible
			<i>Offsite power being mobilized.</i>
		Initial safety training underway (continuous)	Initial safety training underway (continuous)
<u>Construction Engineering</u>			<i>Initiate design of temporary works.</i>

Select Project Kickoff Activities for Various Contract Types

Develop cut and fill plan.

Summary/Conclusion

The table in this Executive Insight provides a starting point for defining and guiding activities to be undertaken as part of project initiation. It presumes that a relatively robust set of planning has occurred during the pre-contract/bid period and that the owner and project team are not beginning with a blank sheet of paper. While the table is constructed from the perspective of a third party service provider, it is adaptable to those situations where the owner is undertaking design activities (preliminary through final) or even direct construction (partial/force account to full facility construction).

The table does not specifically consider joint ventures, but other Executive Insights look at special considerations in joint ventures. Joint ventures may occur with the owner, designer, and construction elements.

About the Author

Bob Prieto was elected to the National Academy of Construction in 2011. He is a senior executive who is effective in shaping and executing business strategy and a recognized leader within the infrastructure, engineering, and construction industries.

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