

# FACILITATOR GUIDE

AI+IM GLOBAL SUMMIT | APRIL 28 - APRIL 30, BALTIMORE, MARYLAND, USA

Thank you for serving as a Facilitator at the [AI+IM Global Summit](#)! This guide will help you prepare for your role as a volunteer Facilitator at the event.

Hosted by the [Association for Intelligent Information Management \(AIIM\)](#), the AI+IM Global Summit explores the intersection of AI and information management and provides practical, actionable education through:

1. Cohort-Based Learning
2. Interactive Sessions
3. Hands-On Workshops
4. Structured Networking

The event is designed for 400 information professionals and solution providers. We are expecting about 75-100 speakers, sponsors (solution providers), and facilitators. The remaining participants are end users or information management practitioners.

## AUDIENCE AND STAKEHOLDERS

As Facilitators, it's important to identify our primary and secondary audiences. Our focus is on the primary audience and their needs, but we want to be cognizant of the secondary audiences.

- Primary Audience
- End users/information management practitioners
- Secondary Audiences
- Consultants and System Integrators
- Solution Providers

**Important Note:** The AI+IM Global Summit is a global conference with participants from around the world, including a delegation from Brazil. AIIM staff will notify you in advance if anyone in your cohort does not have English as their primary language.

## COHORTS

We are employing cohort-based learning at the AI+IM Global Summit.

## WHAT ARE COHORTS?

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Cohorts are small, pre-assigned groups of **8-10** like-minded participants that provide a forum and opportunity for members to connect and learn from each other.

Each cohort is supported by a facilitator from either a Diamond or Gold Sponsor. Facilitators may also include members of the AIIM Board of Directors or AIIM Fellows.

## WHY ARE COHORTS VALUABLE?

Based on extensive research into event design and adult education, we have found that cohort-based education provides a richer learning experience for participants. Participants will receive peer and expert support throughout the Summit.

## COHORT BENEFITS

- Help refine understanding of learning objectives and discover new ideas
- Create a personalized learning experience by matching participants with shared needs and interests
- Provide a sounding board to crowdsource challenges
- Help synthesize learnings to ensure tangible takeaways and action items

## COHORT FORMATION

Cohorts will be formed using AI within our platform Rallyboard. Attendees will complete an intake form that allows Rallyboard AI to make matches based on interests, career level, industry, and time zone.

**Please complete this facilitator intake form to assign your best possible cohort match:**

<https://app.rallyboard.com/aiim/form/rk?t=launch>.

### **Cohort AI Match Dates:**

On three separate dates, AIIM staff and Rallyboard will use AI to recommend cohort matches. AIIM staff will review all recommendations before they are made final.

- February 23, 2026
- March 30, 2026
- Final match for late registrants: April 20, 2026

### **For Facilitators:**

- Facilitators will submit a form indicating area and industry preferences, time zone, and schedule availability
- Facilitators will be matched to the best cohort based on those preferences

## ROLES & RESPONSIBILITIES

### FACILITATOR

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*Facilitators are the MVP's and concierges at the AI+IM Global Summit.*

Each cohort is led by facilitators who are also subject matter experts in the intelligent information management industry. Facilitators lead cohort conversations, serve as cohort leaders, and connect with attendees before, during, and after the event.

## FACILITATOR KEY RESPONSIBILITIES

### Before the Summit:

- Lead two virtual networking sessions on Rallyboard
- Connect with your cohort members
- Review this guide and prepare for virtual and onsite sessions

### During the Summit:

- Guide structured, small-group discussions on key industry topics
- Facilitate both informal gatherings and structured conversations
- Actively listen, guide conversations, summarize findings, and ensure an inclusive environment
- **Important:** You should not lecture or monopolize conversations

### After the Summit:

- Lead one virtual post-Summit meeting on Rallyboard
- Continue supporting your cohort members as they implement their takeaways

## FACILITATOR POINT OF CONTACT

If you have questions about facilitation, please reach out to Sasha Sicard at [ssicard@aiim.org](mailto:ssicard@aiim.org).

If you have questions about logistics, please reach out to Georgina Clelland at [gclelland@aiim.org](mailto:gclelland@aiim.org).

## COHORT MEETING OVERVIEW

Your cohort will meet six times total:

- Virtual Meeting 1: one meeting between March 1-27
- Virtual Meeting 2: one meeting between April 1-24
- Onsite Meeting 1: Monday, April 28
- Onsite Meeting 2: Tuesday, April 29
- Onsite Meeting 3: Wednesday, April 30
- Virtual Meeting 3: one meeting between May 4-29

## ONSITE COHORT SCHEDULE

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These are the days and times we would like Facilitators to be available and ready to facilitate. All onsite cohort meetings will be in the main General Session room at the Hyatt Regency Inner Harbor Baltimore.

*Times are subject to change.*

Day	Time	Activity
Tuesday, April 28	10:00 - 10:30 a.m.	Cohort Conversation
Wednesday, April 29	9:15-10:00 a.m.	Cohort Conversation
Thursday, April 30	9:35-10:25 a.m.	Cohort Conversation
Thursday, April 30	10:55- 11:15 a.m.	Cohort Share-Outs

## VIRTUAL MEETING 1: BUILDING FOUNDATION

- Timeline: Anytime between March 1-27
- Duration: 45 minutes (baseline - you may adjust based on your cohort's needs)
- Platform: Zoom via Rallyboard

### PURPOSE

Meet your cohort, share introductions and current challenges, and establish trust before arriving in Baltimore. This is your opportunity to start building relationships with your ready-made network.

### DISCUSSION PROMPTS

#### Opening (5 minutes)

- Welcome everyone and introduce yourself
- Brief overview of cohort purpose and meeting structure
- Establish ground rules (refer to Cohort Agreements section)

#### Introductions (25 minutes)

Use these questions to help cohort members connect:

- What's your name, organization, and role?
- What's one thing you hope to get from the AI+IM Global Summit?
- What's one thing you hope to give to the Summit? How could you help others?
- Where is your organization in its AI journey (e.g., experimenting with AI, operationalized AI, fully transformed with AI)?
- What's the most interesting project you're working on currently?

#### Challenge Sharing (10 minutes)

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- Is there a specific challenge you are interested in solving at the Summit?
- Is there anyone you wish to meet? Who can I introduce you to?

## Closing (5 minutes)

- Preview Meeting 2 agenda (strategic planning for Summit)
- Encourage cohort to connect via Rallyboard chat between meetings
- Remind everyone to review the Summit agenda before Meeting 2

## VIRTUAL MEETING 2: STRATEGIC PLANNING

- Timeline: April 1-24
- Duration: 45 minutes
- Platform: Zoom via Rallyboard

## PURPOSE

Work together to map out your Summit strategy. Decide which sessions to attend, create your shared "burning questions" list, and plan how to divide and conquer to maximize learning.

## DISCUSSION PROMPTS

### Welcome & Introductions for New Members (5 minutes if needed)

- If you have new cohort members, welcome them and facilitate brief introductions
- Provide a quick recap of Meeting 1 themes for new members

### Summit Strategy Planning (25 minutes)

- What sessions are you most interested in attending?
- Are there any sessions we should "divide and conquer" so our cohort covers more ground?
- What are the burning questions you want answered at this Summit?
- What challenges are you hoping to solve?
- Who do you want to meet or connect with at the Summit?

### Logistics & Social Planning (10 minutes)

- Does the cohort want to meet for coffee, drinks, or dinner during the Summit?
- How will we share notes and insights during the event? (Rallyboard chat, other methods?)

### Schedule Post-Summit Meeting (5 minutes)

- **CRITICAL:** Schedule your post-Summit virtual meeting before ending this call
- Target window: May 4-29
- Find a date/time that works for the group and send calendar invitation

## ONSITE MEETING 1: ALIGNMENT & ACTIVATION

- Date: Monday, April 28, 2026
- Duration: 30 minutes
- Location: Designated table in Solutions and Innovation Hub

**IMPORTANT: YOU MAY HAVE NEW PARTICIPANTS JOINING THIS MEETING WHO REGISTERED AFTER THE SECOND MATCH DATE OR MISSED THE VIRTUAL MEETINGS. WELCOME THEM WARMLY AND FACILITATE BRIEF INTRODUCTIONS FOR NEW MEMBERS AT THE START OF THIS MEETING.**

### PURPOSE

Your first face-to-face meeting! Reconnect in person, welcome any late additions to your cohort, and confirm your game plan for the days ahead. This is your team huddle before the learning begins.

### DISCUSSION PROMPTS

#### Welcome & Introductions (5-10 minutes)

- Welcome everyone to Baltimore!
- If you have new cohort members, facilitate introductions
- For established members: quick reconnection and first impressions of the venue

#### Alignment Check (15 minutes)

- Quick review: What sessions is everyone planning to attend today/tomorrow?
- Are we still on track with our "divide and conquer" plan?
- Any last-minute questions or connections you need help making?
- Reminder of where/when we'll meet tomorrow (Meeting 2)

#### Activation (5 minutes)

- Brief pep talk - encourage cohort to be curious, ask questions, take notes
- Remind everyone to use Rallyboard chat to share insights in real-time
- Confirm any social plans (coffee, drinks, dinner)

## ONSITE MEETING 2: KNOWLEDGE EXCHANGE

- Date: Tuesday, April 29, 2026
- Duration: 45 minutes
- Location: Designated table in Solutions and Innovation Hub

### PURPOSE

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Share key takeaways from Day 1 sessions, discuss what's resonating or surprising, and identify must-attend sessions for Day 2. This is your chance to multiply your learning by hearing perspectives from sessions you didn't attend.

## DISCUSSION PROMPTS

### Session Highlights (25 minutes)

Use "popcorn style" sharing where participants voluntarily share when ready:

- What activities or sessions stand out most clearly from Day 1?
- What were your key learnings so far?
- What specific tools or concepts are you taking away?
- When during yesterday did you feel most engaged or energized?
- What surprised you?

### Pattern Recognition (10 minutes)

- Are you seeing any patterns or connections between different sessions?
- What themes are emerging across the Summit?
- Any contradictions or different perspectives you're noticing?

### Day 2 Planning (10 minutes)

- Based on what you've heard, are there must-attend sessions tomorrow?
- Any speakers or attendees we should try to connect with?
- Don't forget to visit sponsor tables - they may have solutions to your challenges!

## ONSITE MEETING 3: SYNTHESIS & COMMITMENT

- Date: Thursday, April 30, 2026
- Duration: 50 minutes
- Location: Designated table in Solutions and Innovation Hub

## PURPOSE

Reflect on your Summit experience using structured discussion, synthesize your collective learning into key themes, and commit to 1-3 specific actions you'll take when you return to work.

**For this cohort conversation, we will use the ORID method. ORID stands for Objective, Reflective, Interpretive, Decisional.**

## ORID DISCUSSION PROMPTS

**Objective Level - "What do you see?"**

- What activities or sessions stand out most clearly in your mind?
- What were your key learnings from this event?
- What specific tools or concepts will you take away?

#### **Reflective Level - "What do you feel?"**

- When during the event did you feel most engaged or energized?
- What moments challenged your existing perspectives?
- When were you surprised during the event?

#### **Interpretive Level – "What does it mean?"**

- How have these experiences changed your understanding of AI, automation, or information management?
- What patterns or connections do you see between different sessions?

#### **Decisional Level – "What are we going to do?"**

- What actions might you take when you return to your organization?
- How might your learnings influence your approach?
- What's one specific change you'll implement when you return to work?
- Which idea from this event will you share with your colleagues first?

#### **Closing & Next Steps (10-15 minutes)**

- Summarize what you have heard to make sure you and your notetaker captured what was said
- Are there any topics or unanswered questions you are left with?
- How can your cohort support you after the Summit?
- Reminder about post-Summit meeting scheduled in May
- Thank participants and encourage them to continue sharing ideas in Rallyboard

### **POST-SUMMIT VIRTUAL MEETING: ACCOUNTABILITY & EVOLUTION**

- Timeline: May 4-29 (scheduled during Virtual Meeting 2)
- Duration: 45 minutes
- Platform: Zoom via Rallyboard

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#### **PURPOSE**

Share how you've applied key takeaways from the event, address lingering questions, and determine how your cohort wants to stay connected beyond the formal Summit experience.

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#### **DISCUSSION PROMPTS**

##### **Welcome Back & Check-In (5 minutes)**

- Welcome everyone back



- Quick round: How are you feeling post-Summit?

#### **Progress Reports (20 minutes)**

- What actions have you taken since the Summit?
- What commitments from our final onsite meeting have you implemented?
- What wins can you celebrate?
- What challenges have you encountered in implementation?

#### **Ongoing Support (10 minutes)**

- What questions remain unanswered?
- What resources or introductions would be helpful?
- How can cohort members support each other moving forward?

#### **Staying Connected (10 minutes)**

- How does the cohort want to stay in touch beyond Rallyboard? Exchange emails, create LinkedIn group, schedule future check-ins?
- Remind everyone that cohorts will be retired from Rallyboard approximately 2 months after the Summit

#### **Final Thanks & Closing**

- Thank participants for their engagement throughout the journey
- Encourage continued connection and collaboration
- Remind them that AI-summarized notes from all virtual meetings are available in Rallyboard

## **FACILITATION TIPS**

### **MANAGING TIME EFFECTIVELY**

1. Use a visible timer
2. Give clear time signals: "We have 2 minutes left on this question"
3. Be firm but kind about moving discussions forward
4. If a particular question generates exceptional engagement, be flexible and allow more time, but explicitly acknowledge the trade-off

### **ENSURING BALANCED PARTICIPATION**

1. Track participation visually (mental check marks or brief notes)
2. Use gentle invitations for quiet participants: "I'd love to hear from those who haven't shared yet"
3. If someone tends to dominate, acknowledge their contribution and redirect: "Thank you for that insight. Let's hear from someone else now."

### **HANDLING DIFFICULT DYNAMICS**

1. If conversation goes off-topic: "That's an interesting point for another discussion. To respect our time, let's refocus on our current question."
2. For disagreements: "I'm noting different perspectives here. Let's capture both in our notes and move forward."

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## ENGAGEMENT STRATEGIES TIPS

1. Engage in active listening and demonstrate genuine interest to build trust.
2. Engage in active inquiry by staying curious and asking great questions.
3. Demonstrate empathy and strive for understanding.
4. Show respect for diverse opinions.
5. Use a parking lot to capture interesting ideas that may not be relevant to the conversation. Be sure to revisit the "parking lot" if time allows.
6. Check in throughout the conversation.
7. Adapt as needed.
8. Summarize findings.
9. Recognize when someone hasn't participated and invite them to contribute.
10. Recognize tangents and help the group determine whether to explore or add this to a parking lot.
11. Be aware of your own biases as a facilitator.

## FACILITATION MEASURES OF SUCCESS

- **Participant engagement** - Active participation from all members, balanced speaking time, and focused attention throughout. Note: The goal is 100 percent participation, though participation won't necessarily mean or look the same for everyone.
- **Psychological safety** - Participants feel comfortable sharing views honestly, including disagreements or minority opinions.
- **Output quality** – Generated and collected ideas and takeaways that reflect diverse, unbiased perspectives.
- **Process effectiveness** - Staying on topic, managing time well, and following agreed-upon ground rules.
- **Conflict management** - Constructive handling of disagreements and tension while maintaining respectful dialogue.

## POST-SUMMIT ACTIVITIES

AIIM staff will combine reports from the virtual Cohort Conversations and takeaways from workshops and sessions and combine them into a compendium. The compendium will be shared with participants and sold to the broader community.

We encourage Facilitators to continue the conversation post-event. Reach out to participants to ask about their experience and see if they have any outstanding questions or check-in on their progress implementing ideas from the summit.

You will have access to the mobile app for two weeks after the event. Rallyboard will be available for 60 days after the event.

## COHORT AGREEMENTS

The Cohort Agreement is based on AIIM's code of conduct for events.

All conference sessions and spaces are intended to be safe and productive spaces, and we ask all participants to adhere to the following:

1. Create a welcoming space for all to engage and interact.
2. Be accepting of different points of view.
3. Utilize active listening.
4. Do not use explicit or harmful language.
5. Wait for your turn to speak and avoid interruptions.
6. Give space to those who come from traditionally disenfranchised communities.
7. Commit to honesty and integrity at all times.

During the event, AIIM staff or facilitators will immediately dismiss participants, without refund, if they engage in any of the following:

- Racist, sexist, homophobic, ableist, transphobic, or religiously intolerant remarks.
- Any actions that are deemed to harm others such as verbal abuse and harassment.

We ask all attendees and speakers to refrain from self-promotion or promoting their company during educational sessions.