



FACILITATOR GUIDE

AI+IM GLOBAL SUMMIT | MARCH 31-APRIL 2, ATLANTA, GEORGIA, 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 through:

1. Cohort-based learning,
2. interactive sessions,
3. hands-on workshops, and
4. structured networking.

Limited to 400 information leaders, this intimate event is designed to provide participants with meaningful networking connections and practical takeaways. See the full program agenda at <https://www.aiim.org/global-summit-2025-agenda>.

COHORTS

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

WHAT ARE COHORTS?

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

At the AI+IM Global Summit, each cohort is supported by either a Diamond or Gold Sponsor. Sponsors co-facilitate discussions and are paired with a non-vendor facilitator selected by AIIM.

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



1. Cohorts can help refine your understanding of learning objectives, discover new ideas, use as a sounding board, or to crowdsource your challenges.
2. Cohorts create a more personalized learning experience by matching you with other participants who share your needs and interests, creating a more relevant and impactful experience.
3. Cohorts can help synthesize learnings at the end of the event to ensure you have a list of tangible takeaways and action items to bring back to your organization.

COHORT FORMATION

AIIM staff will be forming cohorts in early March and then will notify participants of their assigned cohort. Cohorts will be formed around industries. Facilitators and cohort participants will receive a roster (name, title, organization) of their cohort in advance of the Summit. Here is an example of industry cohorts we will be forming:

- Government and Public Services
- Construction and Engineering
- Legal and Professional Services
- Energy, Oil, and Gas
- Charity and Non-Profit
- Banking and Finance
- Education

SCHEDULE OF STRUCTURED NETWORKING ONSITE

A full event agenda is available at <https://www.aiim.org/global-summit-2025-agenda>. These are the days and times we would like Facilitators to be available and ready to facilitate.

- **Cohort Gatherings** – Informal networking for cohorts that occur during networking breaks/happy hour. Cohort gathering spots may be located near their sponsor's table.
- **Cohort Conversation** – Structured, intentional networking led by a skilled facilitator.

Day	Time	Activity
Monday, March 31	2:00 - 2:30 p.m.	Break and Meet Your Cohort (Cohort Gathering)
Monday, March 31	5:30-7:00 p.m.	Cocktail Reception and Meet Your Cohort (Cohort Gathering)
Wednesday, April 2	9:15-10:00 a.m.	Cohort Conversation on AI and Automation Learning Pathways
Wednesday, April 2	10:45-11:30 a.m.	Cohort Conversation on Information Management and Change Management Pathways

LEARNING PATHWAYS

The AI+IM Global Summit features four learning pathways to categorize workshops and sessions. Participants can move from pathway to pathway. There is no requirement to stay with one pathway.



- **Artificial Intelligence** – Understanding AI technologies, regulations, and policies in information management.
- **Workflow & Process Automation** – Discover how unstructured data can streamline processes, enhance efficiency, and reduce costs.
- **Intelligent Information Management & Information Governance** – Learn about AI governance, IM maturity models, and the future of technology-driven information management.
- **Leadership & Change Management** – Explore leadership techniques and change management strategies to drive successful information management initiatives.

On Wednesday, two capstone sessions will reflect on the four pathways and help provide context before we engage in Cohort Conversations.

ROLES & RESPONSIBILITIES

FACILITATOR

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

Each cohort is led by two facilitators who are also a subject matter experts in the intelligent information management industry. One of the facilitators is a volunteer and the other facilitator is a representative from a sponsor company.

Facilitators lead cohort conversations, serve as cohort leaders, and connect with attendees before and after the event. Onsite, facilitators will guide conversations. Their objective is to actively listen, guide conversations, summarize findings, and ensure an inclusive environment. Facilitators should not lecture or monopolize conversations.

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

- Lead informal networking sessions, bringing together groups with shared interests before, during, and after the event.
- Guide structured, small-group discussions on key industry topics.
- Capture learnings from your cohort so that they may be shared with the broader AIIM community and provide a tangible takeaway to participants

CO-FACILITATORS

Volunteer facilitators will be paired with one of our sponsors who will serve as co-facilitator.

The role of a co-facilitator is to share the responsibility for managing the session, ensuring that the objectives are met effectively and efficiently. This partnership can involve various tasks such as guiding conversations, handling logistical aspects, managing group dynamics, providing additional perspectives, and stepping in when the lead facilitator needs support. Co-facilitators work collaboratively, complementing each other's strengths and skills to create a more engaging and productive environment for participants.



AIIM staff will introduce co-facilitators prior to the event in early March in case you wish to connect ahead of the event.

NOTETAKER

On Wednesday, during the Cohort Conversations, Facilitators may wish to assign another member of their cohort to take notes. AIIM staff will provide a worksheet (printed and in the mobile event app) that each cohort can use to capture their takeaways. Worksheets should be returned or emailed to AIIM staff so we can create a compendium of the event.

LOGISTICS AND ROOM SET UP

Georgina Clelland, COO of AIIM, will manage the room set-up and logistics at the event. To help

FACILITATOR POINT OF CONTACT

If you have questions about facilitation, please reach out to AIIM President & CEO Tori Miller Liu at tliu@aiim.org.

AUDIENCE AND STAKEHOLDERS

The event is designed for 400 information management practitioners and solution providers. We are expecting about 100 speakers, sponsors (solution providers), and facilitators. The remaining 300 participants are end users or information management practitioners.

Note: The AI+IM Global Summit is a global conference and will have participants from around the world. We are also expecting a delegation from Brazil. AIIM staff will strive to let you know in advance if anyone in your cohort may not have English as their primary language.

AUDIENCES

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

STAKEHOLDERS

Stakeholders are those who may benefit or be impacted by our work.

- AIIM community and members who may benefit from the conclusions reported by each cohort.
- AIIM staff

AI+IM GLOBAL SUMMIT

LOGISTICS AND ROOM SET-UP

Cohort Gatherings and Cohort Conversations will take place in the International Ballroom at the Hyatt Regency Atlanta. A newly renovated ballroom, the room also features conversation nooks and seating areas.



Figure 1. International Ballroom conversation areas

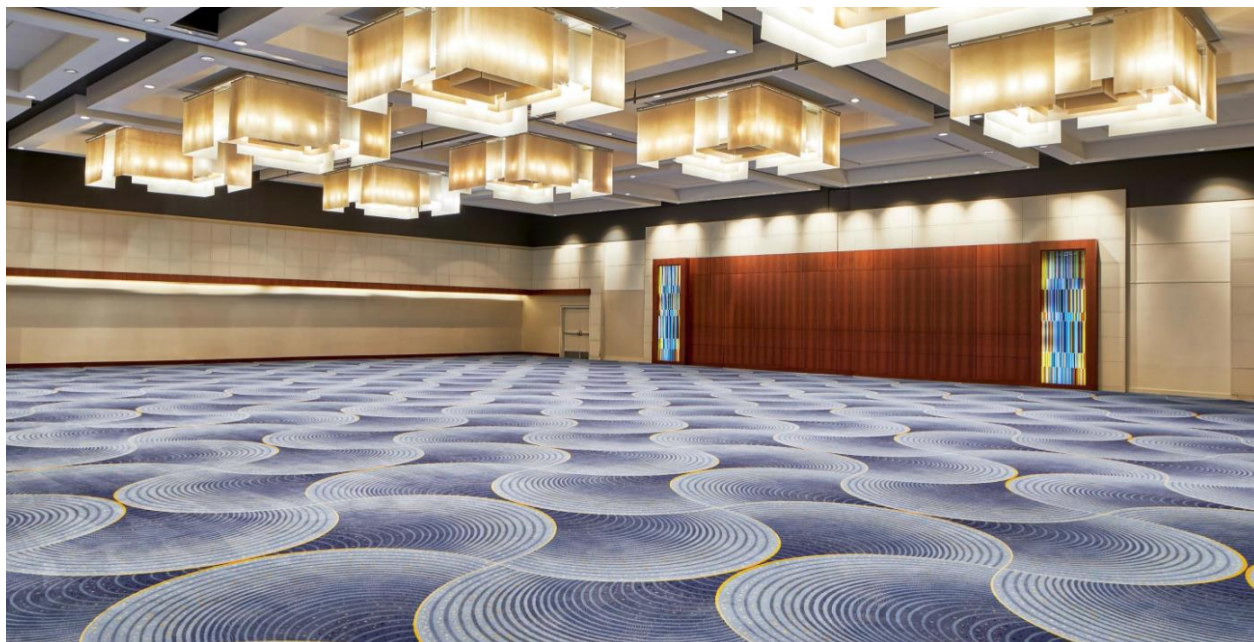


Figure 2. International Ballroom interior



Figure 3. International Ballroom entrance

On Monday and Tuesday, the International Ballroom will be a mixed-use space. Sponsors will have tablespots along the perimeter of the space. The General Sessions and Keynote presentations will take place on a stage in the center of the space. Theater seating, crescent rounds, and highboy café tables will offer space for learning, eating, and networking.

Sponsors will breakdown their tablespots on Tuesday evening. On Wednesday, the room will be converted for Cohort Conversations.

Capstone Sessions will appear on a stage, but the remainder of the space will be banquet style seating. Each table will accommodate 8 participants.

Since all tables will be in the same space, Facilitators may need to be aware of noise in the space. There are seating areas in the International Ballroom that could be used if your cohort would prefer to leave the International Ballroom.

On Wednesday, each banquet table will be equipped with fidget toys, paper, markers, easels, and post-it note boards for Facilitators to use. You will also have access to a digital version of the worksheet for notetaking.

COHORT GATHERING DISCUSSION GUIDE

On Monday, there will be two opportunities for participants to meet with their Facilitators and Cohort members – during an extended break and during the evening networking reception.

Monday, March 31	2:00 - 2:30 p.m.	Break and Meet Your Cohort (Cohort Gathering)
Monday, March 31	5:30-7:00 p.m.	Cocktail Reception and Meet Your Cohort (Cohort Gathering)



We will have signage that indicates where each cohort should meet. We ask Facilitators to stay near this signage and be ready to greet and meet cohort participants.

Cohorts do not need to meet for the entire time or synchronously. This is an opportunity for informal meetings. Facilitators should be prepared to help participants find answers or to introduce them to other event participants who can help.

Here are some questions Facilitators should ask during the Cohort Gatherings.

1. What's one thing you hope to get from the AI+IM Global Summit?
 - What's one thing you hope to give to the AI+IM Global Summit? How could you help others?
2. Is there anyone you wish to meet? Who can I introduce you to?
3. Is there a specific challenge you are interested in solving here?
4. What's the most interesting project you're working on currently?
 - What's one skill or area of knowledge you'd like to develop further?
 - Where is your organization

COHORT CONVERSATIONS DISCUSSION GUIDE

The Cohort Conversations are scheduled for Wednesday, April 2. There are two conversations, each following one of two Capstone Sessions.

Wednesday, April 2	9:15-10:00 a.m.	Cohort Conversation on AI and Automation Learning Pathways
Wednesday, April 2	10:45-11:30 a.m.	Cohort Conversation on Information Management and Change Management Pathways

Cohort Conversations are “focused conversations,” which are structured and purposeful dialogue aimed at addressing a specific topic or issue in a comprehensive and productive manner.

For these two conversations, we will use the ORID method.

- 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?
- **Are there any topics or unanswered questions you are left with?**
- **How can your cohort support you after the summit?**

ENGAGEMENT STRATEGIES TIPS

1. Engage in active listening and demonstrate genuine interest to build trust
2. Demonstrate empathy and strive for understanding
3. Show respect for diverse opinions
4. 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.
5. Check in throughout the conversation
6. Adapt as needed
7. Summarize findings
8. Recognize when someone hasn't participated and invite them to contribute
9. Recognize tangents and help the group determine whether to explore or add this to a parking lot.

FACILITATION MEASURES OF SUCCESS

1. **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.
2. **Psychological safety** - Participants feel comfortable sharing views honestly, including disagreements or minority opinions.
3. **Output quality** – Generated and collected ideas and takeaways that reflect diverse perspectives.
4. **Process effectiveness** - Staying on topic, managing time well, and following agreed-upon ground rules.
5. **Conflict management** - Constructive handling of disagreements and tension while maintaining respectful dialogue.

PRE-SUMMIT ACTIVITIES

Prior to the Summit, here are some activities Facilitators will engage in to help us foster community and provide context before the event begins.

BUILD COMMUNITY

1. AIIM staff will send all participants emails letting them know what cohort they have been assigned and providing the names and email address of their cohort's facilitators. We will also share the name, title, and organizations of their cohort members.
 - We will share the LinkedIn profile of Facilitators and encourage cohort participants to connect with Facilitators online in the event mobile app.



- We will encourage cohort participants to introduce themselves and begin networking in the event mobile app.
- We encourage Facilitators to reach out and connect with their cohort members in advance of the event via the mobile app.

ESTABLISH CONTEXT

2. AIIM has scheduled four pre-summit webinars to provide an overview of each pathway. Learn more and register at <https://www.aiim.org/aiim-global-summit-learning-pathways-webinars>.

POST-SUMMIT ACTIVITIES

AIIM staff will combine reports from the 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.

COHORT AGREEMENTS

Tori Liu will be sharing the Cohort Agreement and outlining the agenda for the Cohort Conversations 8:30-8:45 a.m. on Wednesday. During the initial conversation on Wednesday at 9:15 a.m., please take five minutes to remind cohort members of the Cohort Agreement.

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.