

# CM Pros Summit Project Plan

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## Themes, Messages

*General:*

- “Providing information, expertise, and support to content management professionals and the organizations they serve”

*Summit:*

- “Are you a CM Pro?”
- “CM Pros (the organization and the membership) know(s) content management”
- “A community of practice that practices what it preaches”
- “Establish a drumbeat and keep it going”

## Summit Overview

- One-day session (April 11, 2005) in conjunction with the Gilbane conference at the Palace Hotel in San Francisco
- The Palace Hotel is adjacent to the financial district of downtown San Francisco at 2 New Montgomery Street (corner of Market), within walking distance of Union Square and the Embarcadero
- Open, interactive format that provides an opportunity for participants to get to know and exchange ideas with others working in similar areas of endeavor
- Opportunity to get ideas, advice, and recommendations from experts who are already well established in the field, as well as participate in an exchange of ideas with the entire community of practice
- Capture the events (information exchanges) in real time, refine and structure the content, and publish (Web, print)
- Use the results (for example, session summaries, recommendations, key challenges, favorite tools, roadblocks and their potential solutions, and profiles of the CM Pros membership – presented in a structured, compelling, easy to read, and easy to access format) to inform and inspire current and new members, interested organizations, and the general public about the strategy and practice of content management

*Specific ideas:*

- Publish excerpts (key quotes, photos, discussion summary) of the sessions immediately after the conference
  - Issue periodic press releases and other communications about CM Pros activities and initiatives
  - Roll some of the material into longer pieces (for example newsletters or white papers)
- As a final Summit wrap-up activity, capture ideas for the next Summit and for other follow-on activities
  - Refine this plan based on the Spring Summit activities and participant ideas for future Summits, and write up objectives and ideas for the next Summit within two weeks of the April one

## **Agenda, Session Proposals**

- **8:30 – 10:00 Gilbane Conference keynote address**

No Summit activities have been scheduled during this time so participants can attend the Gilbane Conference keynote address.

- **10:00 – 10:15 Break**
- **10:15 – 10:30 Summit begins: Logistics, housekeeping, board/staff introduction**
- **10:30 – 11:15 Summit keynote address (Ann Rockley, President, CM Professionals Board of Directors)**

*Speaker biographical information:*

Ann Rockley has done groundbreaking work in the field of information for content reuse, teaches content management courses at the University of Toronto, and is the author of *Enterprise Content Management*.

*Session overview:*

Why is CM important? We ourselves may know why, but how can we communicate this to our organizations, especially to the skeptics?

How can we convince people that CM is not just about buying an expensive tool? How can we convince them that they can't just take all the loose information floating around and stuff it into a CM system?

Why is CM implementation a collaborative effort (and what's good and bad about that)? What kind of expertise is required to implement a complete CM system? What roles and job titles are part of the process?

What is CM Professionals? Why was it founded? What are the key goals of the organization? What are they key objectives for 2005? What are the key membership benefits? How can members contribute to the success of the organization?

- **11:15 – 12:15 Participant introductions (All, who are we and what do we do)**

*Session overview:*

Content management is a process that involves creating, managing, and delivering content. We may (or may not!) all agree on that much.

But how many stages are there, really? Three? Five? More? Is it best portrayed as a timeline, a flowchart, or a jigsaw puzzle?

How many people does it take to do content management? Can a single person hope to know and do it all? Or is it always a team activity? How many team members? A handful? Dozens? What kinds of skills do team members need to have?

We all see ourselves belonging in the content management picture, but we don't always agree on how the picture is defined, or even where we and others fit.

Who are we and what do we do? Let's get better acquainted.

Participants should be prepared to give a two-minute introduction that provides some or all of the following information:

- Are you a content creator, manager, or publisher (or some combination)?
- What is your educational background?
- What's the essence of your career so far? How did you get into content management?
- What kind of organization do you work for? Profit or non-profit? Size? Location? Product or service?
- What is your current title? Is it appropriate for what you do? What do you hope your title and role will be a year from now?
- What is your biggest content management-related challenge? How are you working to meet it?
- What do you hope to get out of CM Professionals and the Summit?

- How are you willing to help meet CM Professionals goals and objectives?
- Are you willing to be interviewed for a newsletter article?
- Where do you place yourself in the content management “picture”?

*Possible follow-on deliverables:*

- (Structured) member directory
- Member interviews, published periodically on the Web in a newsletter format

*Before lunch:*

Identify restaurants where groups could go for dinner, and get a preliminary reaction and rough count.

- **12:15 – 1:30 Lunch**
- **1:30 – 2:05 Roundtable Session 1 (led by facilitators/note-takers) plus short break**

*Session overview:*

Six to ten sessions (depending on space) will take place simultaneously. Every session will run during each of the four time slots. Each session needs a facilitator and a note-taker.

Facilitators will open each session with some key points to focus the discussion, and will then open the discussion to the group.

- **2:15 – 2:50 Roundtable Session 2 plus short break**
- **2:55 – 3:30 Roundtable Session 3**
- **3:30 – 3:45 Break**
- **3:45 – 4:15 Roundtable Session 4**
- **4:15 – 5:00 Open Board Meeting and Forum (Board)**

*Session overview:*

Brief biographical introductions by members of the Board. How did they get into the content management business, and what do they do in their day jobs? Where do they hope to see the organization going, and how can the

membership-at-large help? Where would they like to see the organization in five years?

Summary of the member survey and how the Board used it to put together their strategic plan and key initiatives for 2005. Handout.

Ask for participant feedback on the Summit and ideas for the next one.

- **5:00 – 6:00 Break, followed by dinner**

Optional activity. Several restaurants were identified before the noon break. Participants are encouraged to sign up to join one of the groups. Someone needs to call the restaurants with an approximate count.

## **Deliverables, Other Activities**

### ***Advertising Deliverables***

- **Signs**
  - Printing: Jeff Arcuri
  - Three: One at the registration desk, one in a high traffic area, one at the door to the Summit room
- **Newsletter/Brochure**
  - Written for the Summit: Include quotes, catchy glossary definitions, aphorisms, results of member survey, and organization boilerplate
  - Printing: Probably Kinkos
  - 300 copies
  - Insert into the Gilbane conference program
  - Also stack on handouts table with magazines and at the door to the Summit room
- **Buttons**
  - “Are you a CM Pro?”
  - Same one from last time
  - Give one to participants as they register
  - Also available from [cafepress.com/cmpros](http://cafepress.com/cmpros)
  - Mail to the hotel?
- **CM Pros Business Cards**
  - Name, logo, Web site address, tagline
  - 2000
  - Same one from last time
  - Encourage members to give away
  - Mail to the hotel?
- **Tote Bags, Other Logo Items**
  - Samples on display in the Summit room
  - Order from [cafepress.com](http://cafepress.com)
  - Mail to the hotel?

## Logistics, Staffing

- **Registration Desk**
  - Register at the Gilbane conference registration desk
  - Gilbane personnel, but CM Pros staff need to be available by cell phone
  - CM Pros Web registration needs to close down by April 7, after that registration at the event only
  - Register by check, cash, or credit card (need to arrange transfer of fund from Gilbane)
- **Badges**
  - Jeff Arcuri will handle
  - Plastic imprintable for vendor capture
  - Printed insert to headline CM Pros
  - Badge holder with lanyards
- **Wireless Access**
  - Likely to be available throughout the hotel
- **Summit Session Room**
  - Probably between 60 and 100 attendees
  - Between six and ten roundtable sessions
  - Use Ann's laptop for agendas, slides?
  - Screen, table, and flip charts available from the hotel
  - Set up during site visit (March 6-9)
  - Need three people with digital cameras
  - No video or audio recording – notes on flipcharts only
- **Session Room Refreshments**
  - Pitchers of water only
- **Lunch**
  - Separate lunchroom
  - Summit attendees can eat with Gilbane conference attendees

## Timeline

### February

15 Feb Press release distributed  
15 Feb Registration page on Web site  
15 Feb Preliminary agenda (with speaker names) on Web site  
15 Feb Summit team identified  
16 Feb Advertising deliverables plan in place  
16 Feb Speakers identified  
16 Feb Initiatives and committee chairs identified  
16 Feb Logistics and staffing plan in place  
18 Feb Summit team conference call  
18 Feb Agenda refined and reposted to Web site  
18 Feb Report progress to Board  
25 Feb Report progress to Board

### March

2 Mar Summit team conference call  
4 Mar Deadline for rountable session proposals  
4 Mar Report progress to Board  
7 Mar Site visit at hotel (depends on when Jeff is in town)  
9 Mar Announce rountable sessions to membership  
*11 Mar thru 19 Mar Anna is out of town*  
23 Mar Summit team conference call  
30 Mar All deliverables complete

### April

6 Apr Summit team conference call  
8 Apr Report progress to Board  
11 Apr Summit  
20 Apr Summit team conference call (lessons learned)  
22 Apr Report lessons learned to Board  
29 Apr Some (TBD) post-summit deliverables complete  
29 Apr Call for papers (?) for next Summit