

**CRM Workshop Planning Subgroup  
March 1, 2010 – 10:00-11:00AM ET**

**Agenda**

<b><u>Topic:</u></b>	<b><u>Presenter:</u></b>	<b><u>Time:</u></b>
Welcome & Roll Call	Tesheia Johnson Mike Joyner	10:00
Action Items (Previous Meetings)	Tesheia Johnson Mike Joyner	10:05

<b>Action Item(s)</b>	<b>Owner(s)</b>	<b>Due Date</b>
Create a list of proposed discussion points for each of the two breakout sessions to circulate for comments/feedback. Breakout sessions will focus on: (1) Establishing Metrics for Process Improvement, and (2) Project Management & CRM Tools	Kim Toussant Jane Strasser DJ McCloskey	By next meeting (2/24/10)
Determine which 3 vignettes will be selected for this year's Workshop based on call for vignette topics to CRM Group	All	At next meeting (2/24/10)
Fred de Pourcq has agreed to be the lead on the planning of the poster sessions for the Workshop this year; Fred and Tesheia will draft guidelines for the poster session	Tesheia Johnson Fred de Pourcq	By next meeting (2/24/10)
If Stephen Rosenfeld has a conflict with presenting on Day 1 of the Workshop, ask him if he would prefer to present on Day 2	DJ McCloskey	Check back with SR in early March to see if he has a conflict

2010 Workshop Agenda Revisions – presentation topics, speakers, breakout times, breaks (last revision on 1/27/10)	Tesheia Johnson Mike Joyner	10:35
Other Business	All	10:50
Recap of Action Items	Tanya Buttress	10:55
Adjourn		11:00

**\*Next Meeting Date & Time: Wednesday, March 24 at 2:00PM ET. Please be reminded that all CRM Workshop Planning Subgroup meetings will take place on the 4th Wednesday of each month from 2-3pm ET.**

\*Wiki page for the CRM Workshop Planning Subgroup (requires login):  
<https://www.ctsawiki.org/wiki/display/CRM/CRM+Workshop+Planning+Group>