

Gartner Customer Strategies & Technologies Summit 2013

5 – 6 June

Lancaster London Hotel, London, UK

gartner.com/eu/crm

HOT TOPICS

- *Social and Mobile CRM*
- *Single View of the Customer*
- *“Big Data” and Customer Analytics*
- *Differentiated Customer Experiences*
- *The Future of CRM*

EARLY-BIRD SAVINGS Register by 5 April 2013 and save €300



Understand. Engage. Deliver: Earning

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The ways in which customers wish to engage with an organization are evolving. New channels, elevated expectations and a shift in power are forcing organizations to rethink how they manage customer relationships. Organizations must work hard to **understand** their customers via a single holistic view, stimulate **engagement** through appropriate communications and continually **deliver** rewarding and differentiated experiences. Sounds simple in theory, but the reality is complex and many organizations struggle to:

- Develop CRM initiatives that pay equal attention to vision, strategy, customer experience, organizational collaboration, processes, information, metrics and technology.
- Obtain a single-view of the customer that encompasses all aspects of their relationships from a bewildering multitude of data sources.
- Maximize the potential of social, mobile and online channels, whilst ensuring cross channel consistency
- Increase customer satisfaction, loyalty and advocacy when IT budgets are under increasing pressure.
- Evaluate and select the right providers for their unique business requirements.

The **Gartner Customer Strategies & Technologies Summit** will provide both IT and Business professionals with the insight and inspiration they need to address these challenges and more. With specific tracks for those interested in Sales, Marketing, Customer Service and Customer Experience as well as one dedicated to those who are new to the world of CRM, the summit will help attendees to shape a leading-edge vision and strategy for CRM across their organizations that will **earn customers for life**.



Jim Davies
Conference Chair,
Gartner



Shane O'Rourke
Program Director,
Gartner Events



With dedicated tracks focusing on Sales, Marketing, Customer Service and Customer Experience, this is Europe's most important gathering of business and IT professionals who are involved in customer focused initiatives.

Customers for Life

Attending for the first time?

- Learn how to establish a vision and strategy for CRM, what to do first and how to deliver value to your organization.
- Understand how to manage the inevitable organizational and cultural changes that will come as you develop new ways for managing your customers.
- Focus on how new digital channels such as social and mobile can be integrated as part of a multichannel approach.
- Discover how the complex market for CRM applications will evolve. Meet with some of the leading providers.
- Improve your business processes, customer experience and customer insight.
- Obtain best practices for achieving a true "single view of the customer" and learn how "big data" is dramatically influencing organizational strategy.
- Network with Gartner analysts, your peers and guest speakers to exchange ideas and best practices.

Why Return?

The world of business and technology never stays still. And neither does this event. This year's Summit will enable experienced CRM practitioners to:

- Discover brand new Gartner Research never presented before on topics including: the impact of big data on sales, marketing and customer service; how social, mobile and video are revolutionizing customer processes; best practices for improving the customer experience, and CRM mega-vendor analysis and negotiation best practices.
- Get deep insight into the future of CRM and how organizations will have to adapt to this future.
- Explore disruptive trends such as social, mobile and cloud that will reshape the way organizations manage customer relationships.
- Understand the deep impact of "Big Data" and learn how advances in analytics will reward fast adopters by helping them to be smarter about how they use their data.
- Delve into the non-technological aspects of CRM, the people and process issues that often cause CRM projects to stumble.

WHO SHOULD ATTEND?

This event is designed for:

- Chief Customer Officers
- CIOs, Technology Strategists, IT Managers
- Heads of Customer Experience
- Heads of Customer Strategy
- Heads of Customer Intelligence
- Chief Marketing Officers, VPs of Marketing, Marketing Managers
- VPs of Sales, Sales Managers
- VPs of Customer Service
- Customer Service Managers
- Contact Center Managers
- CRM Project Managers
- Business Analysts

A CRM Foundations

In order to understand, engage, and deliver to customers, an organization needs to have both a plan, and the pieces in place to bring it all together. In this track we look at the pieces that are necessary for all types of organization, including developing a strategy, understanding the role of data and analytics, the influence of social and mobile, and the impact CRM has on an organization and its employees.

B Sales

The sales organization's objective is to exceed revenue targets. Leading sales organizations combine people, process and technology to optimize sales performance and stay ahead of the competition. Recently, the external forces of mobile, social, cloud and big data all have all emerged as key technology enablers for sales leaders. This track takes a close look at how these external forces, along with a clear focus on improving the skill set and competency of the sales force, is changing management's approach to sales enablement and boosting performance.

C Marketing

Marketing drives innovation and competitive differentiation through improved customer engagement. As organizations exploit social and mobile in more pragmatic ways, interest becomes renewed in event-triggered and inbound marketing techniques that leverage big data. This track focuses on how CMOs and marketing executives can balance innovation while adopting an integrated approach to marketing that will be key to success.

D Customer Service

The goal of customer service is in transition. The quality of customer service delivery directly impacts brand and profitability, as well as holding the potential to contribute to sales and marketing efforts. This track will examine how organizations can transform customer service into a strategic business asset at a time when interaction channels are splintering. We will explore the next generation of the customer service contact center and highlight the role of social media, analytics, and mobile devices.

E Customer Experience

It is difficult to achieve an elevated and consistent experience across all communication channels. Social, mobile and even video are complicating how customers engage with each other and the organization. Once aligned however, this effort can provide competitive differentiation that is hard to replicate. Acting upon the voice of the customer, self-service and the digital user experience are key to success. This track helps delegates plan for, build and improve the customer experience, with the goal of creating lifelong customer relationships.

V Virtual Tracks: Mobile, Social, Data, Analytics and more

This year's Summit tackles the major topics that are "top of mind" for CRM professionals. Each of the above tracks will address the same broad topic areas — Analytics, Data, Mobile, People and Processes, Social, Strategy and Innovation and Web. In addition, each track will also include a case study. This matrix structure will allow delegates to either follow a role-based or topic-based agenda through the course of the event.

	Foundations	Sales	Marketing	Customer Service	Customer Experience
Mobile	✓	✓	✓	✓	✓
Social	✓	✓	✓	✓	✓
Web	✓	✓	✓	✓	✓
Analytics	✓	✓	✓	✓	✓
Strategy	✓	✓	✓	✓	✓
Data	✓	✓	✓	✓	✓
Workshop	✓	✓	✓	✓	✓
Case Study	✓	✓	✓	✓	✓

Workshops, Contract Negotiation Clinics, and Roundtable Sessions

In this track, delegates will contribute to a series of practical and interactive workshops, clinics and roundtable sessions, sharing best practices and networking with peers, Gartner analysts and winners of the Gartner and 1to1 Media CRM Excellence Awards.

THE GARTNER AND 1to1 MEDIA CRM EXCELLENCE AWARDS 2013

The Gartner and 1to1 Media CRM Excellence Awards highlights world-class customer strategy and CRM initiatives and shares their successes, challenges and insights.

Join us on the opening morning of the event to recognise the winners and attend a series of roundtables with those winners to understand how they have achieved excellence and to hear their best practices.

Awards will be presented in six categories:

- Customer Experience Excellence
- Customer Service Optimization
- Integrated Marketing Performance
- Sales Force Effectiveness
- Social and Mobile Engagement
- Customer Analytics



MEET THE ANALYSTS

Gartner analysts draw on the real-life challenges and solutions experienced by clients from 12,400 distinct organizations worldwide.

Gene Alvarez
Research VP



E-commerce; Social Commerce; Mobile Commerce; CRM Strategy and Vision; Configure, Price and Quote

Alexa Bona
VP, Distinguished Analyst



Trends in Software Licensing, Pricing and Maintenance impacting CRM Costs; SaaS and Cloud Contracting for CRM; Negotiating with Salesforce.com, Microsoft, Oracle and SAP

Kim Collins
Research VP, CRM



Integrated Marketing Management; Marketing Resource Management; Marketing Performance Management

Jim Davies
Research Director



Voice of the Customer; Enterprise Feedback Management; Contact Center Workforce Optimization; Customer Experience Management; Customer Service Contact Center

Gareth Herschel
Research Director



Customer Segmentation; Predictive Analytics; Text Mining; Real-Time Recommendations; 360 Degree View of Customer; CRM Metrics and Performance Management

Partha Iyengar
VP, Distinguished Analyst



Customer Experience Approaches; CIO Roles in Customer Experience; Customer Experience in a Globalized World

Johan Jacobs
Research Director



Web Self Service; Web Customer Service; Collaborative Browsing; eMail Response Management; Virtual Assistants; Knowledge Base for Self Service; WCS/eService Vendors; Multi-Channel Contact Center; Customer Interaction Hub

Nick Jones
VP, Distinguished Analyst



Mobile/wireless Technology; Platform and Device Trends; Mobile Application Development; Mobile Strategy (both employee-facing and consumer-facing)

Michael Maoz
VP, Distinguished Analyst



Customer Service Strategies; Customer Service CRM Multi-Channel Applications; SaaS/On Demand CRM Applications; Social Networking; CRM Strategies; eCustomer and Mobile CRM

Scott Nelson
Managing VP



CRM Strategy; CRM Visioning; Social Media Strategy and CRM; CRM and Broader Application Strategy

Bill O'Kane
Research Director



Master Data Management; Customer Data Integration; Single View of the Customer; Information Governance

Adam Sarner
Research Director



Marketing Automation: Includes Multi-Channel Campaign Management, Marketing Resource Management, Enterprise Marketing Management, Loyalty Management, Lead Management, E-Marketing, and Social CRM/Online Relationships

Praveen Sengar
Principal Research Analyst



Configure Price and Quote; E-commerce B2B and B2C; Mobile and Social Commerce; E-commerce on Cloud; CRM Deployment in Asia Pacific

Patrick Stakenas
Research Director



Sales Performance Management; Incentive Compensation; Sales Process; Sales Analytics; Sales Effectiveness; Mobile Sales

Jenny Sussin
Senior Research Analyst



Social for CRM; Social Media Strategies; Social Networking; Peer-to-Peer Customer Communities

Ed Thompson
VP, Distinguished Analyst



Customer Experience Management; CRM Strategy and Implementation; CRM Deployments in Europe; CRM Vendors; Feedback Management



AGENDA AT A GLANCE

Agenda correct as of 8 February 2013

WEDNESDAY 5 JUNE

At the Summit, please refer to the agenda in the event guide provided, for the most up to date session and location information

07:30 – 20:00	Registration, Information and Refreshments					
08:00 – 08:45	Tutorial: 90 Seconds or Bust: Sponsor Snapshot <i>Michael Maoz</i>					
09:00 – 09:10	Summit Chair Welcome <i>Jim Davies</i>					
09:10 – 10:15	Gartner Keynote: Understand, Engage, Deliver: Earning Customers for Life <i>Gene Alvarez, Jim Davies and Ed Thompson</i>					
10:15 – 11:00	Refreshment Break in the Solution Showcase					
11:00 – 11:30	Panel Discussion <i>Moderated by Jim Davies and Ed Thompson</i>					
11:30 – 11:45	Presentation of the Gartner and 1to1 Media CRM Excellence Awards					
11:45 – 12:45	Guest Keynote: Concrete Customer Connection in a Complex, Fast-Changing World <i>Professor Eddie Obeng, Author, Innovator, Educator</i>					
12:45 – 14:00	Lunch in the Solution Showcase					
	A CRM Foundations	B Sales	C Marketing	D Customer Service	E Customer Experience	Interactive Sessions
14:00 – 15:00	Establishing a Vision and Strategy <i>Scott Nelson</i>	Mobile, Social, Cloud, and Big Data Power the Future of Sales <i>Patrick Stakenas</i>	Applying Pace Layers to Integrated Marketing Management <i>Kim Collins</i>	The Next Generation of Customer Engagement <i>Michael Maoz</i>	Customer Experience is the Next Competitive Frontier <i>Partha Iyengar and Ed Thompson</i>	14:00 – 15:45 Workshop: Contract Negotiation Clinic: Software as a Service <i>Moderated by Alexa Bona</i>
15:15 – 15:45	Solution Provider Session	Solution Provider Session	Solution Provider Session	Solution Provider Session	Solution Provider Session	
15:45 – 16:15	Refreshment Break in the Solution Showcase					
16:15 – 17:15	Embrace Organizational, Cultural and Technological Change <i>Scott Nelson</i>	Sales Effectiveness Analytics Helps Optimize the Customer Facing Selling Process <i>Praveen Sengar</i>	Contextual Marketing on a 2" Screen <i>Adam Sarner</i>	Move Over Web, Here Comes Video Customer Service <i>Johan Jacobs</i>	Best Practices for Negotiating with Microsoft, Oracle, Salesforce.com and SAP <i>Alexa Bona</i>	16:15 – 18:00 Workshop: Assessing the Customer Experience Maturity of Your Organization <i>Moderated by Partha Iyengar</i>
17:30 – 18:00	To the Point: Customer Analytics 2020: Moving Beyond Traditional Metrics <i>Gareth Herschel</i>	To the Point: Supercharging the Sales Organization with Sales Performance Management <i>Patrick Stakenas</i>	To the Point: The Future of Marketing is Data-Driven <i>Kim Collins</i>	To the Point: Is Mobile Customer Service Right For You? <i>Johan Jacobs</i>	To the Point: Top 10 Mistakes in User Experience (UX) Design Projects <i>Gene Alvarez</i>	
18:00 – 20:00	Networking Reception in the Solution Showcase					

THURSDAY 6 JUNE

08:00 – 16:15	Registration, Information and Refreshments					
08:00 – 09:00	Turning Mobile Innovation into Business Value <i>Nick Jones</i>	Move Lead Management from Good to Great to Maximize Revenue <i>Patrick Stakenas</i>	Multi-Channel Campaign Management: A Digital Transformation <i>Adam Sarner</i>	Getting it Done: Social Customer Service in Action <i>Jenny Sussin</i>	Voice of the Customer: Speech is the Voice of the Heart <i>Jim Davies</i>	08:30 – 10:15 Workshop: Catharsis, Compromise and Collaboration: Bridging the Divide Between Marketing and IT <i>Moderated by Kim Collins</i>
09:15 – 10:15	End-User Case Study	End-User Case Study	End-User Case Study	End-User Case Study	End-User Case Study	
10:15 – 10:45	Refreshment Break in the Solution Showcase					
10:45 – 11:45	The Clash of the CRM Mega-Vendors <i>Ed Thompson</i>	Social for Sales Day Is Coming <i>Jenny Sussin</i>	Optimizing Marketing Performance <i>Kim Collins</i>	What's the Big Deal with Big Data for Customer Service? <i>Gareth Herschel and Michael Maoz</i>	Why Do My Customers Hate My App? <i>Nick Jones</i>	11:00 – 12:30 Workshop: Why Are Customers Not Using Your Online Self Services? <i>Moderated by Johan Jacobs</i>
12:00 – 12:30	Solution Provider Session	Solution Provider Session	Solution Provider Session	Solution Provider Session	Solution Provider Session	
12:30 – 13:30	Lunch in the Solution Showcase					
13:30 – 14:30	The Single View of the Customer: Fact or Fantasy? <i>Bill O'Kane</i>	A Vision for Ecommerce – and the Trends That Will Shape Your Strategy <i>Gene Alvarez</i>	What's Next for Social Marketing? <i>Adam Sarner</i>	Customer Service Metrics: What, Why and How <i>Gareth Herschel</i>	Creating a Customer Experience Centric Organization and Skill Set <i>Partha Iyengar</i>	13:30 – 15:00 Workshop: Impact of Gamification on Sales <i>Moderated by Patrick Stakenas</i>
14:45 – 15:15	To the Point: How Different Could Your Organization be in 2020? <i>Scott Nelson</i>	To the Point: Empowering Sales People With Mobile Sales Applications Anytime, Anywhere <i>Gene Alvarez</i>	To the Point: Web Analytics: Its Expanding Scope and Significance <i>Gareth Herschel</i>	To the Point: Optimizing the Contact Center Workforce: The Key Service Experience Influencers <i>Jim Davies</i>	To the Point: Real Use of Social to Improve the Customer Experience <i>Jenny Sussin</i>	
15:15 – 15:45	Refreshment Break in the Solution Showcase					
15:45 – 16:30	Closing Guest Keynote					
16:30 – 16:45	Closing Remarks <i>Jim Davies</i>					
16:45	Conference Close					

Assigned categories for each session are included in the descriptions on the following pages

Gartner Keynote: Understand, Engage, Deliver: Earning Customers for Life



Empowered customers with elevated expectations are stimulating new ways for organizations to compete and build lasting profitable relationships. Organizations want to know how to capitalize on this shift and reduce the inherent growing complexity whilst still leveraging past customer relationship management investments. This keynote will discuss:

- How to build customer relationships that last and create value for the customer and the organization
- How to use a growing supply of data to understand customers better
- How to better engage customers at the right time and with the right messages.
- How to pull it all together to deliver great customer experiences that benefit the customer and the organization.

Gene Alvarez, Jim Davies and Ed Thompson

Guest Keynote: Concrete Customer Connection in a Complex, Fast-Changing World



In his keynote presentation, Professor Eddie Obeng will introduce the challenge of developing and sustaining valuable customer relationships in a complex, competitive and fast-changing world. He will address three themes:

- Generating a deep understanding — from incidence to causality — getting into the customer's skin
- Creating relationships which are dynamic and interdependent
- Transforming your organization to deliver the opportunity

Using his world-famous “World After Midnight” model, Professor Obeng's passionate and humorous presentation will explain how to move from possibilities to opportunities.

Professor Eddie Obeng, Author, Innovator, Educator

AGENDA GUIDANCE

To help you navigate the summit agenda, we've identified track sessions that match your experience level and information needs. Specific categories include:

MATURITY LEVEL

- F Foundational:** If you are at the early stages of your initiative, or are a newcomer to this space, these sessions will give you the necessary understanding and first steps.
- A Advanced:** If you are an advanced practitioner, these sessions are designed to take your initiative, or understanding, to the next level.

FOCUS

- T Tactical:** Sessions providing tactical information that can be used straight away, with a focus on “how to”, dos and don'ts, and best practices.
- S Strategic:** Sessions focusing on the strategic insight supporting the development and implementation of your action plan.

PERSPECTIVE

- B Business:** Sessions geared toward business leaders, or IT professionals who need to understand the challenges and opportunities from a business, organizational, or cultural perspective.
- IT Technology:** Sessions that address technical concepts, details, and analysis.



Establishing a Vision and Strategy

The first two buildings blocks of the Gartner Eight Building Blocks of CRM are vision and strategy. Sounds nice, but most firms don't really know what that means. In this session, we look at what a vision and strategy for being customer-centric really means, and how to go about setting both in place to guide your CRM decision making.

- What is a vision and strategy for CRM, and why is it important?
- Why is it difficult to develop a vision and strategy?
- What should firms do going forward to put a vision in place?

Scott Nelson

F **S** **B** Virtual Track **SI**

Embrace Organizational, Cultural and Technological Change

CRM is not about installing a piece of software. It is about changing from a product-centric company to a customer-centric customer. As such, organizations need to understand the non-technology changes that are going to occur. Here we look at the organizational and cultural changes that organizations will have to deal with, even as they change the technology basis for dealing with customers.

- What role does culture play in successful CRM?
- How do organizational issues help or hinder CRM?
- How does a firm manage the change that CRM brings to it?

Scott Nelson

F **T** **B** Virtual Track **PP**

To the Point: Customer Analytics 2020: Moving Beyond Traditional Metrics

The possibilities of customer analysis will change dramatically over the next few years as the potential of big data influences organizational strategies and customer expectations. This session examines the future of customer analytics and outlines the current best practices:

- How will advanced analysis improve customer metrics?
- What benefits can be gained from the use of analysis to enhance customer experiences and relationships?

- What best practices do organizations need to put in place to be ready for big data and the future of analysis?

Gareth Herschel

F **B** Virtual Track **A**

Turning Mobile Innovation Into Business Value

This session explores the new consumer-facing business opportunities that will emerge as today's mobile apps and websites evolve into advanced contextual interactions involving multiple devices, multichannel applications and new user experiences, and exploit new technologies such as Near Field Communications (NFC) and indoor location.

- Which mobile technology and market trends will impact customer relationships and customer-facing applications?
- How will corporations make the most effective use of mobility to interact with customers?

Nick Jones

F **S** **B** Virtual Track **M**

The Clash of the CRM Mega-Vendors

The CRM mega vendors may dominate investment but they lack best of breed capabilities in over 30 of the 120 categories of CRM application Gartner tracks including social and mobile. This session will help you to compare CRM application mega-vendors and their smaller competitors.

- How will the market for CRM applications evolve through 2015?
- Which long-term uncertainties and cloud-limitations will have the biggest impact on CRM application software through 2017?
- Which CRM application mega-vendors will emerge as best for your enterprise in 2015?

Ed Thompson

F **S** **IT** Virtual Track **S**

The Single View of the Customer: Fact or Fantasy?

Everyone talks about a single view of the customer, but the reality is that they have multiple, inconsistent silos. This session discusses how to implement master data management (MDM) to improve business processes, customer experience and insight, and how to optimize the use of big data sources.

- What are the best practices for mastering customer data across the enterprise?
- How will the MDM of customer data market evolve in the future?
- What are the new "single view of the customer" challenges and opportunities around topics like "big data"?

Bill O'Kane

F **S** Virtual Track **D**

To the Point: How Different Could Your Organization be in 2020?

A problem for many organizations is that they just start to adapt to one trend (like social) when another hits (like mobile). It's better to envision a future state for an organization, and then figure out how to get to it. Here we examine what your organization might look like in 2020, and how to navigate the changes.

- How to make a real change in your vision rather than just incremental change
- What can be learned from other customer centric industries?
- What are some of the leading organizations thinking when they say "customer centric"?

Scott Nelson

F **S** **B** Virtual Track **W**

Workshop: Contract Negotiation Clinic: Software as a Service

This is a small, hands-on interactive session that will deliver a powerful combination of Gartner insight and peer best practices to position you well for your next contract negotiation or renegotiation with your SaaS providers. We will explore hidden costs and opportunities/risks within SaaS agreements, and explore what can be negotiated and how.

- What are trends in SaaS contracting?
- What are the hidden costs in SaaS contracts, and how can you ensure your organization avoids them?
- What are key opportunities and risks of SaaS agreements?

Please note that this session is available to end-users only and that pre-registration is required. Strictly limited to 30 people.

Moderator: Alexa Bona

T

Mobile, Social, Cloud, and Big Data Power the Future of Sales

Sales organizations are facing a number of simultaneous disruptive forces threatening to make current deployments of limited use. This presentation will explore the combined impact of mobile, social, cloud, and big data on SFA applications and vendors.

- How will Mobile, Social, Cloud, and Big Data invalidate your current sales strategies through 2016?
- How will sales organizations adapt their applications strategy to leverage disruptive technology forces?
- How will CRM Sales vendors evolve to support Mobile, Social, Cloud, and Big Data?

Patrick Stakenas

A **S** Virtual Track **SI**

Sales Effectiveness Analytics Helps Optimize the Customer Facing Selling Process

As organizations look to grow and move from products to solutions, targeting new buying centers in a competitive environment, traditional sales approaches fail to deliver. This session will outline the vision for sales, how to move beyond efficiency, sales analytics requirements and best practices to drive sales effectiveness.

- Key challenges with sales and understanding sales efficiency and effectiveness
- The Gartner Sales Automation framework and associated analytics requirements
- Best practices to drive sales effectiveness

Praveen Sengar

Virtual Track **A**

To the Point: Supercharging the Sales Organization with Sales Performance Management

This session examines how sales performance management (SPM) can help organizations to exceed revenue and profitability goals. Executing on an SPM strategy involves difficult changes to company culture and the sales organization along with the technology IT deploys.

- What business and technology drivers will push sales organizations to execute on an SPM strategy?

- How do sales organizations align operational and analytical processes to measure sales performance?
- What best practices can be used during the selection and use of an SPM solution?

Patrick Stakenas

F **S** Virtual Track **PP**

Move Lead Management from Good to Great to Maximize Revenue

Every organization invests in lead generation, but relatively few are able to maximize the revenue potential of those leads. This session will discuss the best practices, tools and technologies required to maximize lead management ROI.

- What best practices, tools, and technologies are needed to maximize lead management ROI?
- How should digital marketing activities in web, social, or email marketing align with established marketing channels?
- How can Sales, Marketing, and IT Management develop a shared vision and strategy around lead management?

Patrick Stakenas

Virtual Track **D**

Social for Sales Day Is Coming

This session examines the realities and myths of how social media is impacting the sales organization. We highlight what best practices sales organizations are employing to get ahead of the game and explore both the short and long term impact of social CRM.

- Why should sales people care about social media?
- What does social for sales look like?
- Who is actually investing in social for sales?

Jenny Sussin

B Virtual Track **S**

A Vision for Ecommerce – and the Trends That Will Shape Your Strategy

Successful companies are redefining their e-commerce processes and platforms as they respond to the empowered customer, but this is simply the first wave of change. This session identifies:

- Which key trends that will influence where e-commerce is going in the future?
- How will customer experience transform B2B and B2C commerce?
- What needs to be done to prepare for the future of e-commerce?

Gene Alvarez

A **B** Virtual Track **W**

To the Point: Empowering Sales People With Mobile Sales Applications Anytime, Anywhere

Smartphones and tablet-powered processes will have the most significant impact on a salesperson's productivity and effectiveness since the introduction of the cell phone. This presentation analyzes how sales organizations can better mobilize their salesforce.

- How will the adoption of mobile-based platforms evolve for sales organizations through 2016?
- How will mobility impact CRM sales application strategy?
- What are the technology, architectural and vendor considerations when developing a mobile-based sales strategy?

Gene Alvarez

A **B** Virtual Track **M**

Workshop: Impact of Gamification on Sales

Companies are flocking to programs to motivate, reward and recognize through new methods that don't always involve compensation. This workshop will explore how gamification is being used to change behavior and drive improved results on what are often non-revenue-related accomplishments. This workshop is a "must do" for sales leaders and sales operations to learn how to adopt gamification, and deploy best practices to increase revenue and heighten the customer experience.

Please note that this session is available to end-users only and that pre-registration is required. Strictly limited to 30 people.

Moderated by Patrick Stakenas



Applying Pace Layers to Integrated Marketing Management

CMOs must drive competitive differentiation and innovation, while CIOs are focused on standards and functional integration. There are various applications that support different types of marketing processes. This presentation explores how pace layers can be used by CMOs and CIOs as a framework to balance the marketing applications portfolio.

- What challenges do CMOs face today?
- What is the pace layer framework, and how to apply it to managing marketing applications?
- How to select technologies and vendors for integrated marketing management

Kim Collins

A Virtual Track **SI**

Contextual Marketing on a 2" Screen

Mobile adoption has exploded and marketers have increased opportunities to meaningfully engage with customers. Marketers will need the specific context of mobile devices to craft creative and engaging digital marketing experiences. This presentation will focus on best practices and emerging applications marketers can use for developing their mobile marketing strategy.

- Why should marketers focus on a mobile marketing strategy?
- What are the best practices for mobile marketing?
- What does the technology landscape look like for mobile marketing?

Adam Sarner

S **B** Virtual Track **M**

To the Point: The Future of Marketing is Data-Driven

Big data is fundamentally changing the nature of marketing. This session presents the Gartner model of the four practices comprising data-driven marketing (DDM), and key drivers and impediments to adoption. Learn how data can make marketing more effective and accountable, and how IT and business can align to resolve issues of privacy and scale.

- How can organizations use data to inform marketing strategy?

- How can data be used to drive operations and accountability?
- How is the DDM ecosystem evolving, and how can enterprises best engage?

Kim Collins

F Virtual Track **D**

Multi-Channel Campaign Management: A Digital Transformation

Marketers are shifting traditional marketing strategies and moving toward digital marketing, a two-way approach that involves and anticipates both B2B and B2C customers' wants and needs. This session focuses on a digital approach, including social, mobile and the "Internet of Things" using campaign management to orchestrate the complexity of customer interactions.

- What are the drivers fuelling campaign management?
- How will digital marketing reinforce campaign management?
- How will vendors evolve to support campaign management orchestration?

Adam Sarner

A **B** Virtual Track **PP**

Optimizing Marketing Performance

The marketing mix continues to expand, but marketing budgets remain tight. High-performance B2B and B2C marketing organizations will have to decrease marketing costs while driving top-line growth. This presentation provides guidance on how to increase return on marketing investment (ROMI).

- How do you improve the top line and drive increased revenue from marketing?
- How do you manage the bottom line for marketing and decrease marketing program costs?
- How do you manage marketing performance and calculate ROMI?

Kim Collins

Virtual Track **A**

What's Next for Social Marketing?

Social marketing is a business strategy that mutually benefits digital communities by ceding levels of control and fostering engagement, while generating opportunities for marketing and the rest of the

organization. This presentation focuses on the drivers, the multiple use cases and technology for social marketing.

- What is social CRM and what are the drivers for the customer and for marketers?
- What are the developing use cases for social marketing?
- How will vendors evolve to support social marketing?

Adam Sarner

S **B** Virtual Track **S**

To the Point: Web Analytics: Its Expanding Scope and Significance

The Web analytics ecosystem is expanding beyond simple site analysis to address social and mobile channels, measure campaign attribution and define customer segments. This session examines new techniques, solutions and ways to hire and organize a digital analytics team for better effectiveness.

- Why is analytics an important part of digital marketing?
- How is the web analytics market evolving to meet new requirements?
- What are the best practices for building an effective web analytics team?

Gareth Herschel

B Virtual Track **W**

Workshop: Catharsis, Compromise and Collaboration: Bridging the Divide Between Marketing and IT

Marketing and IT are often at odds with each other when it comes to leveraging technology to support marketing. Through interactive discussion and workgroups, this workshop will explore the challenges each group faces when working with the other, how they can better compromise and what strategies and tactics will enable them to better collaborate. This workshop is a must attend for attendees in both marketing and IT looking to work together more effectively.

Please note that this session is available to end-users only and that pre-registration is required. Strictly limited to 30 people.

Moderated by Kim Collins

T

The Next Generation of Customer Engagement

The shift to social media channels is proving a disruptive force for Directors of Customer Support. Cloud-based applications and supporting the mobile customer makes co-operation with IT vital. This session looks at transformational customer support processes, presenting the top CRM customer support applications for a customer-centric enterprise:

- What trends will disrupt the way business delivers customer service?
- How will customer service organizations prioritize CRM projects?
- Which cloud-based technologies will drive best-in-class customer service?

Michael Maoz

A Virtual Track **SI**

Move Over Web, Here Comes Video Customer Service

With the increasing power of cameras and the greater availability of bandwidth, companies are getting into the business of enabling more video-type services, not only for Web-linked devices but also for the mobile phone. This session describes how to augment existing Web-based services with video.

- What types of video-based services are available and in demand?
- Where and how will video be able to enhance and complement existing Web customer services approaches?
- What are the best practices when planning video customer services?

Johan Jacobs

A **S** **B** Virtual Track **W**

To the Point: Is Mobile Customer Service Right For You?

Mobile is no longer an adjective to describe only cellular handsets and networks, but is evolving into a customer service differentiator. The mobile customer service market remains confused and complex as organizations struggle to cope with large numbers of new devices, services and applications.

- Which mobile trends will impact customer relationships and customer-facing applications?
- How will organizations use mobile technology, services and tools to interact with customers?

- What does a business case for mobile customer service look like?

Johan Jacobs

Virtual Track **M**

Getting it Done: Social Customer Service In Action

This session discusses how to maximize the potential of social customer service by moving from the identification of business objectives to the creation of tactics. We examine the best practices that Gartner has seen in social customer service that are intimate, efficient and realistically scalable.

- What makes social customer service unique?
- What business objectives are actually being met through social customer service?
- How can we practically achieve social customer service objectives?

Jenny Sussin

T **B** Virtual Track **S**

What's the Big Deal with Big Data for Customer Service?

The growing volume, variety and velocity of data will change customer expectations about the role of customer service and the way organizations deliver service. This session examines the transformation that big data will enable for customer service organizations, giving examples of the organizations, skills and technologies that will deliver success.

- What does big data mean for customer service organizations?
- What does a big data-enabled customer support organization look like?
- How to manage the transition to the customer service center of the future?

Gareth Herschel and Michael Maoz

A **B** Virtual Track **D**

Customer Service Metrics: What, Why and How

The automation of customer service has allowed organizations to track almost every aspect of the customer experience, but the focus on reducing the cost to serve customers has meant that most analysis focuses on only a few metrics. This session will discuss the relative value of different customer service metrics and how organizations are collecting and using them.

- What are the key customer service metrics organizations should be tracking and why?
- What are best practices for collecting and using customer service metrics?

Gareth Herschel

B Virtual Track **A**

To the Point: Optimizing the Contact Center Workforce: The Key Service Experience Influencers

For many organizations, success or failure lies in the hands of their least-motivated, lowest-paid and most-likely-to-defect segment of employees — the agent. By optimizing the agent life cycle — recruitment, scheduling, evaluation and training — service organizations can improve their performance and elevate the customer experience.

- What is contact center WFO and why is it important?
- How can best practices be applied to the agent life cycle — recruit, schedule, evaluate, train?
- Which vendors can help, and how do they align to CRM?

Jim Davies

Virtual Track **PP**

Workshop: Why Are Customers Not Using Your Online Self Services?

Many organizations invested huge resources in building out self service websites but wonder why customers are not using it. This workshop will explain why customers are not using your self service solutions, expose the missing link of what you should fix and give you the tools to measure the Customer Service-Ability of your self service websites. Participants will discuss:

- Why are customers not using your Web Self Service solutions?
- What does "In-Channel Support" mean?
- How to evaluate your web for Customer Service-Ability?

Please note that this session is available to end-users only and that pre-registration is required. Strictly limited to 30 people.

Moderated by Johan Jacobs

S **B**

TRACK E: Customer Experience

Customer Experience is the Next Competitive Frontier

At leading enterprises, a relentless focus on the customer and delivery of satisfying customer experiences is generating remarkable customer loyalty, revenue growth and increased valuations. Deriving these benefits requires a customer-centric approach that focuses on a customer experience (CX) value chain. This session discusses:

- What is a customer experience, and how is its improvement measured?
- Which projects will deliver the most positive customer experiences?
- Which technologies are best for helping to improve the customer experience?

Partha Iyengar and Ed Thompson

A **S** **B** Virtual Track **SI**

Best Practices for Negotiating with Microsoft, Oracle, Salesforce.com and SAP

Four companies dominate the world of IT CRM software, and the challenges of negotiating pricing and contracts with them are formidable. This presentation addresses the challenges of negotiating with the big four and advises on how to orchestrate a successful contract.

- What are key trends that affect software licensing and pricing?
- What are the key areas of leverage with, Microsoft, Oracle, Salesforce.com and SAP?
- What are the key terms and conditions to negotiate with Microsoft, Oracle, Salesforce.com, and SAP?

Alexa Bona

T **IT** Virtual Track **D**

To the Point: Top 10 Mistakes in User Experience (UX) Design Projects

Every UX project experiences mistakes. Some mistakes are small, narrow-scope, surmountable annoyances. Others can prove fatal to the success of the project. For example, choosing a promising-but-immature technology may be a mistake, but the real error is to make the selection decision at the start of the project, before the requirements are known.

- What are the top 10 mistakes in UX projects, and why are they wrong?
- What are best practices for managing risk in UX projects?
- How can these best practices be applied to enterprise settings?

Gene Alvarez

T **IT** Virtual Track **W**

Voice of the Customer: Speech is the Voice of the Heart

Customer feedback varies from the completion of a corporate survey to a throw-away comment on Twitter. Each has merit. The ability to collect, analyze and act upon these diverse feedback channels in a holistic way is a key challenge for organizations that are aiming to improve the customer experience.

- What is voice of the customer (VoC) and where to start?
- How can organizations best leverage the direct, indirect and inferred customer voices?
- Which vendors will best help collect, analyze and act on the VoC?

Jim Davies

T **B** Virtual Track **A**

Why Do My Customers Hate My App?

Every app store is a social network and the success of apps depends on how others rate them. This session examines what makes people love or hate apps, and what organizations should do to get better ratings.

- What mobile app behaviors do customers love or hate?
- How should organizations design mobile apps to maximize customer satisfaction?

Nick Jones

A **T** Virtual Track **M**

Creating a Customer Experience Centric Organization and Skill Set

This presentation discusses the strategy, organization and key skills needed to achieve customer experience excellence. Key amongst these are the skills needed to define and deploy a customer experience value chain to replace the traditional Michael

Porter-defined “functional value chain” that most enterprises have today.

- How are organizations creating a strategy for improving the customer experience?
- Who leads a customer experience initiative?
- What does the organizational structure look like?

Partha Iyengar

T **B** Virtual Track **PP**

To the Point: Real Use of Social to Improve the Customer Experience

The use of social media to improve the customer experience has evolved rapidly over the last four years. Some organizations treat social as a channel; others as a completely new business model. This session looks at some of the real successes and what can be learned from them.

- What did the social media space look like in 2007 and what will it look like in 2017?
- Who has made a serious investment in using social to improve the customer experience?
- What technologies can help support the social component of your customer experience strategy?

Jenny Sussin

T **B** Virtual Track **S**

Workshop: Assessing the Customer Experience Maturity of Your Organization

Companies are flocking to programs to motivate, reward and recognize through new methods that don't always involve compensation. This workshop will explore how gamification is being used to change behavior and drive improved results on what are often non-revenue-related accomplishments. This workshop is a “must do” for sales leaders and sales operations to learn how to adopt gamification, and deploy best practices to increase revenue and heighten the customer experience.

Please note that this session is available to end-users only and that pre-registration is required. Strictly limited to 30 people.

Moderated by Partha Iyengar

S

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