Gartner Customer 360 Summit

June 28 – 30 • Los Angeles, CA • gartner.com/us/crm

EARLY-BIRD SAVINGS
Save $300 when you register by May 7

CRM Strategies and Technologies to Understand, Grow and Engage Customers

GUEST KEYNOTES

Paul Greenberg
Author
President, 56 Group

Patrick Lencioni
President
The Table Group

Don Peppers
Founding Partner
Peppers & Rogers Group

CONFERENCE CO-CHAIRS

Gareth Herschel
Director
Gartner Research

Adam Sarner
Director
Gartner Research

New focus on business-IT alignment
Summit Overview

Gartner Customer 360:
The single most important demonstration of Gartner insight in the CRM space brought to life

Customer experience from every angle
Four focus areas examine the entire customer life cycle—from initial strategy to engagement, and from obtaining the right customer metrics to growing long-term loyalty—and tools and techniques for success in every phase.

Full access to proprietary CRM research
In-depth research—for real companies facing real business issues—is what Gartner does best. As an attendee, you'll be the first to know what Gartner considers new and noteworthy in the CRM space.

The energy and excitement of a live CRM event
Be part of a dynamic, live atmosphere that yields big ideas and creative problem solving you won't find on a printed page. Engage in peer networking that's consistently rated as the best in the industry.

An independent point of view you can trust
Our reputation was built on objective advice and recommendations derived from real-world, field-tested research, observations and insight.

The new social customer can be your best ally, or your worst nightmare
Just ask our special guest speaker, Paul Greenberg, president of the 56 Group and author of the best-selling book, Light: Essential Customer Strategies for the 21st Century, who will be on-site to provide his insight and outlook for social CRM.

What's new in 2010?
Big-picture strategy balanced with key tactical recommendations designed to help you deliver greater business value immediately.

• Two-and-a-half days, four tracks and 50-plus sessions
• Renewed focus on collaborative and social CRM
• Comprehensive focus on creating a customer-centric culture
• Strong emphasis on business content
• More Magic Quadrants and MarketScope sessions
• More case studies and hands-on workshops
• New presentation formats of varied lengths and styles
• High-powered networking opportunities with industry peers
• New Gartner & 1to1 Media CRM Excellence Award winners

Benefits of Attending

Business and IT leaders
Collaborating and exchanging critical knowledge on how to implement CRM strategies and technologies to better understand, engage and grow customer relationships and revenue

Key benefits
You'll learn how to:
• Meet the challenges and seize the opportunities of social CRM.
• Build and practice collaborative skills with your business and IT counterparts, partners and customers.
• Apply proven methodologies to enhance the customer experience.
• Make the customer the epicenter of your organization's strategy, processes and culture.
• Gain insight into your customers to better manage their current and future needs.
• Leverage the right tools, people and processes to acquire, retain and grow customer relationships.
• Better understand and integrate emerging applications and services.

CRM Excellence
Gartner & 1to1 Media CRM Excellence Awards celebrate organizations that have achieved dramatic customer experience impact with their CRM programs and initiatives. Hear the successes, challenges and insight from the winners in the following categories: enterprisewide, growth, efficiency, customer experience impact with their CRM programs and initiatives. Moderated by Don Peppers, founding partner, Peppers & Rogers Group.

Table of contents
2 Overview
3 Benefits of Attending
4 Meet the Analysts
5 Keynote Sessions
6 Summit Tracks
7 Summit Highlights
8 Agenda at a Glance
10 Session Descriptions
19 Solution Showcase
20 Registration

Register by May 7 and save $300.

Hot topics
Customer experience
• Creating a customer-centric enterprise
• Organizational and cultural changes
• Vision and strategy for CRM

Marketing
• Lead management
• Customer segmentation
• Performance measurement
• Online customer communities

Customer data, analytics and metrics
• Single view of the customer
• Improving customer data quality
• Business intelligence tools
• Customer value analysis

Customer service
• Customer self-service
• Service metrics
• Customer feedback management
• Social networking and media

Sales
• Analytics, metrics and reporting
• Lead management
• Sales force automation
• Social networking and media

Web, e-commerce and social media
• Web 2.0 tools
• Web analytics
• Web marketing

Visit gartner.com/us/crm or call 1 866 405 2511.
Meet the Analysts

For over 25 years, Gartner analysts have been the trusted advisors to many of the world’s largest and most demanding organizations. Gartner analysts continually draw from the real-life challenges and solutions experienced by 60,000 clients worldwide.

Keynote Sessions

Guest keynotes
For full keynote descriptions, including Gartner keynotes, visit gartner.com/us/crm.

Patrick Lencioni
President, The Table Group

Paul Greenberg
Author
President, 56 Group

Don Peppers
Founding Partner
Peppers & Rogers Group

Plus...

Customer 360 workshop series
- Leveraging Social Media Within Your CRM Strategy
- Customer Experience
- Web Analytics Best Practices
- CRM Contracts and Negotiation
- Mastering Customer Data Quality
- How to Use Key Performance Indicators to Manage CRM Initiatives
- Overcoming Organizational Inertia: Driving Change Management
- Ensuring Executive Buy-In for CRM

Seven Magic Quadrant sessions
Topics include:
- Service (contact center)
- Marketing
- E-commerce
- CRM service providers (North America)
- Master data management
- Service (e-service)
- Sales force automation

An opportunity to see, hear and speak with the leading experts in the CRM world, and share new ideas and strategies.
### Agenda at a Glance

**Build your own customized agenda online**

Use our convenient Agenda Builder to custom-create your own summit curriculum prior to the event. You can even customize your agenda via your mobile phone and sign up for RSS alerts. Get started at [gartner.com/us/crm](https://gartner.com/us/crm).

| | 11:00 a.m. | A2. Case Study: Government | B2. Case Study: Financial Services |
| | 11:30 a.m. | Attendee Lunch and Solution Provider Dessert Reception |
| | 4:00 p.m. | A4. Establishing a Customer-Centric Culture | B4. Taking the Measure of Online Customer Behavior |
| | 5:00 p.m. | K2. Guest Keynote | Building Collaborative Trust |

**Monday, June 28**

| 7:00 a.m. | Registration |
| 7:30 a.m. | Fast Forward: CRM Solutions in Two Minutes or Less |
| 8:30 a.m. | K1a. Welcome Address & Gartner 60 Seconds or Bust |

**Tuesday, June 29**

| 7:00 a.m. | Registration |
| 8:00 a.m. | A5. Measuring the ROI of Customer Centricity |
| 9:15 a.m. | K3. The Gartner & 1to1 CRM Excellence Award Winner’s Best Practices Panel—Five Category Winners |

**Wednesday, June 30**

| 7:00 a.m. | Registration |
| 8:00 a.m. | A8. Social CRM: Where Is It Today and Where Is It Going Tomorrow? |
| 11:15 a.m. | K5. Gartner Keynote |

**Conference Tracks**

- **Track A**: Create a Customer-Centric Enterprise
  - 10:00 a.m. A1. Creating a Customer-Centric Strategy for Your Enterprise
  - 11:00 a.m. A2. Case Study: Government
- **Track B**: Understand the Customer
  - 10:00 a.m. B1. Must-Have Analytic Capabilities for Competitive Advantage
  - 11:00 a.m. B2. Case Study: Financial Services
- **Track C**: Grow Customer Relationships
  - 10:00 a.m. C1. Critical Capabilities in Multichannel Campaign Management
  - 11:00 a.m. C2. Case Study: Healthcare and Pharmaceuticals
- **Track D**: Engage Customers
  - 10:00 a.m. D1. The Customer Service Processes and Technologies Most Critical to Your Organization
  - 11:00 a.m. D2. Case Study: Manufacturing

**Speaker Details**

- **Paul Greenberg**, Author and President, 56 Group
- **Kimberly Collins**
- **Gene Alvarez**
- **Bill Gassman**
- **John Radcliffe**
- **Ray Valdes**

**Panel Moderator**

- **Don Peppers**, Founding Partner, Peppers & Rogers Group

**Conference Chairs**

- **Gareth Herschel**
- **Adam Sarner**

**Conference Chairs & Key Take-Aways**

- **Key Take-Aways and Open Q & A**

**Conference Tracks**

- **Track A**: Create a Customer-Centric Enterprise
- **Track B**: Understand the Customer
- **Track C**: Grow Customer Relationships
- **Track D**: Engage Customers

**For session descriptions and agenda updates, visit [gartner.com/us/crm](https://gartner.com/us/crm).**
### Keynotes

**K1a. Welcome Address and Gartner 60 Seconds or Bust**
Welcome to Customer 360 and Meet-the-Analyst—the fastest and funniest introductions ever.

Gareth Hershel, Research Director; Adam Sarner, Research Director

**K1b. Gartner Keynote: The Life and Times of Customer Relationship Management**
This presentation will look back over three decades of customer relationship management, look sideways at the current state of CRM and look forward to the future of CRM over the next decade. The presentation will aim to seek out lessons from the past, the trends in place today as organizations face huge uncertainty and massive change, and identify how CRM will be different going forward. In this fast-paced session the objective will be to give a 360 degree overview of what Gartner analysts have seen, are seeing and expect to see. The session will act as a scene-setter for the more focused breakout sessions at the Gartner Customer 360 Summit.

Ed Thompson, Vice President and Distinguished Analyst

**K2. Guest Keynote: Building Collaborative Trust**
Based on the principles in his brand-new book, *Getting Naked*, New York Times best-selling author Patrick Lencioni presents a revolutionary and counterintuitive approach to client service that yields uncommon levels of trust and loyalty. “Naked Service,” as Lencioni calls it, provokes consultants and service providers to be completely transparent and vulnerable with clients and to avoid the three fears that ultimately sabotage client allegiance. Learn principles like “enter the danger,” “tell the kind truth,” and “always consult instead of sell” that can help you establish a fiercely loyal client base. Whether you are an internal or external consultant—or anyone else serving long-term clients—you will glean some powerful tools for overcoming the three fears, and gain a real and lasting collaborative trust and competitive edge.

Patrick Lencioni, Author, Founder and President, the Table Group

**K3. Gartner & 1to1 CRM Excellence Award Winner’s Best Practices Panel**
Hear the strategies and best practices from the 2010 CRM Excellence Award winners.

Award Winners: TBD
Johan Jacobs, Research Director, Gartner; Ginger Conlon, Editorial Director, 1To1 Media; Don Peppers, Founding Partner, Peppers & Rogers Group

**K4. Panel: Strategies for Engaging the Social Customer that Actually Work**
Paul Greenberg brings together three great case studies which demonstrate how Social CRM can make a big impact on your organization. Hear the strategies of the successful programs from American Progress, Comcast and Hoover’s.

Panelists: Brian Komar, Director of Strategic Outreach, Activism and Alliances, American Progress; Frank Eliason, Director of Digital Care, Comcast; Heidi Tucker, Vice President of Business Development, Hoover’s

Moderator: Paul Greenberg, Author and President of the 56 Group

**K5. CRM 2020: What’s Next?**
Join the Gartner analysts as they explore and debate what’s next for CRM and how customer practices will likely evolve in the next decade.

Gartner Analyst Team; Moderator: Gene Alvarez, Vice President

### Networking

**N1. Customer 360 Power Networking Forum**
Past attendees have told us they would like to network more and earlier, so we’re introducing a series of facilitated, structured—and fun—networking activities preconference so you can get to know your fellow attendees, identify who has the same issues, and make new friends and relevant connections before the conference even starts.

### Orientations

**O1. Fast Forward: CRM Solutions in Two Minutes or Less**
The fastest way to discover what CRM solutions and services you can explore at Customer 360, this session offers brief, two-minute overviews from each of our sponsors—providing just enough information to help you net out who you should meet with first.

Moderator: Matt Goldman, Vice President

**O2. The Hitchhiker’s Guide to Gartner Methodologies and Frameworks**
Puzzled by the maze of methodologies and frameworks in Gartner research? Aimed at both business and IT users, this tutorial explains the most commonly used Gartner frameworks such as Magic Quadrants and Hype Cycles that the analysts will present throughout the conference.

Sharon Mertz, Research Director

### Track A

**A1. Creating a Customer-Centric Strategy for Your Enterprise?**
Being customer-centric has to begin with a strategy. But what does that mean? What should such a strategy include and what will it help your firm accomplish that would otherwise not happen? And a good place to start is, What does being customer-centric really mean to your firm?

Scott D. Nelson, Managing Vice President

**A2. Case Study**

**A3. Customer-Centric IT Architecture: The Components Required for an Extraordinary Customer Presence**
In order to achieve an outstanding customer presence, more is required than a Web server and some simple content management. A sampling of necessary leading technologies includes portal frameworks, social-computing tools and cross-channel technologies. Assembling these from best-of-breed vendors can be an integration nightmare, but no single vendor has everything required. A reference architecture is a necessary ingredient, leading to a consistent approach to delivering the platform for your future customer interactions.

- What capabilities are present in award-winning customer sites?
- What technology components are required to support award-winning capabilities, and how do they work together?
- What does the future hold for customer-centric IT architectures?

Gene Philp, Managing Vice President
A4. Establishing a Customer-Centric Culture
Enterprises that seek to become customer-centric need to move beyond strategy to create an environment that develops and supports customer-centric behaviors. This session highlights how enterprises can create an enduring and adaptive customer-centric culture.
Matthew Goldman, Vice President

A5. Measuring the ROI of Customer-Centricity
Although economic conditions have improved, risk and uncertainty persist. In response, business executives are requiring additional facts prior to making investment decisions. This presentation provides the sources of facts and describes the process for using facts to lower the risk and quantify the benefits of CRM initiatives.

- What is the process for building an effective business case for your CRM initiative?
- What metrics can be used to quantify the benefits of CRM?
- How can the business case be used to manage your initiative and calculate benefit-realization?
Michael Smith, Vice President

A6. Case Study

A7. Aligning Marketing Processes to Optimize Marketing and CRM Performance
As the economy begins to rebound, marketing is being increasingly asked to drive growth opportunities for companies through its customer initiatives. However, marketing budgets are not returning to pre-recession levels. Marketing will need to focus on revenue-generating CRM initiatives while improving the efficiency of its operational activities. By aligning its executional, operational and analytical processes, marketing will be able not only to maximize the spend and ROI of its marketing dollars, but will also be able to drive increased performance for the company's broader CRM initiatives. This presentation discusses the top marketing processes to consider over the next 12 months. It will explore how to align these processes to achieve business value via CRM, measure marketing performance and drive CRM strategy.

- What are the top marketing processes for driving a return to revenue growth?
- What are the top marketing processes to increase operational efficiency?
- How do I align executional, operational and analytical processes and measure marketing performance?
Kimberly Collins, Managing Vice President

A8. Social CRM: Where Is It Today and Where Is It Going Tomorrow?
Gartner analyst Michael Maoz and author Paul Greenberg present their views on how Social CRM has changed everything…and what it will do in the future.
Michael Maoz, Vice President and Distinguished Analyst; Paul Greenberg, Author and President of the 56 Group

A9. The Market for CRM: Switched On—But Is There Really Light at the End of the Tunnel?
This presentation will focus on the critical shifts occurring in the CRM market, examine how the market is evolving and highlight the vendors and solutions best positioned to benefit or lose. A discussion of market performance and future outlook is framed in the context of the changing market dynamics, major players and future challenges anticipated during the market recovery. The session is targeted at vendors, buyers or investors seeking a performance perspective on the CRM market, key players and high growth areas. The impact of shifting consumption patterns and contribution of emerging regions will also be explored. The session concludes with recommendations for business and technology strategies to consider implementing today, and a discussion of what and who to watch through 2010 and into 2011.
Sharon Mertz, Research Director

Track B

B1. Emerging Customer Analytic Capabilities for Competitive Advantage
Which investments are delivering insights that drive competitive advantage? This session will outline investments such as real-time decisioning and text analytics that are becoming standard components of an analytic applications portfolio.

- Which forces will shape the way organizations deploy and use analytics over the next decade?
- What are the most important emerging analytic techniques for organizations to evaluate?
Gareth Hershel, Research Director

B2. Case Study

B3. How Many Single Views of the Customer Can You Afford to Have?
Everyone talks about the single view of the customer, but often the reality is that there are multiple, inconsistent “single views” in different parts of the organization. To integrate these silos and create a unifying, master, trusted version of the truth you need to invest in the discipline of master data management (MDM). Leading organizations are leveraging MDM to improve their CRM related business processes, the overall customer experience, customer insight and business decision-making. Attend this presentation to learn more about MDM and how it can help your CRM strategy.

- Why are organizations investing in MDM and what has been achieved so far?
- What are the best practices for MDM and how will they evolve?
- How will the MDM of customer data market and technologies evolve, and which vendors will win?
John Radcliffe, Vice President

B4. Taking the Measure of Online Customer Behavior
Find out how to exploit the unprecedented measurement techniques online channels offer. Learn how the best organizations measure the impact of campaigns, content and applications to improve customer experiences and business results.
Bill Gassman, Research Director

B5. Voice of the Customer: How To Collect, Analyze and Act on It
Most organizations survey their customers but very few apply best practices. Customers are being bombarded with generic, badly crafted questionnaires and are becoming increasingly reluctant to participate. Enterprise feedback management (EFM) solutions help organizations to understand their customer needs and perceptions by asking customers the right personalized questions at the right time on the right channel. This presentation examines:

- What is enterprise feedback management?
- What functional considerations and best practices should be considered during the selection and use of an EFM solution?
- Which vendors can help with EFM initiatives?
Jim Davies, Research Director

B6. Case Study
Session Descriptions

Customer insight is not a “once and done” deployment. New analytic techniques continue to emerge and there is always the opportunity for new applications of old techniques. This session will outline the organizational and infrastructural best practices for establishing the capability to learn from and about your customers.

- What are the roles and responsibilities of a customer insight group?
- How do we collect requirements and establish a customer analytic roadmap?

Gareth Hershel, Research Director

B8. How To Stop Worrying About Data Quality and Love Your Inner BI
Sometimes it is necessary to make gut decisions based on trend data rather than precision. We look at trends in decision-making as applied to marketing and how the Business Intelligence team and their tools can help.

Bill Gassman, Research Director

B9. Making the Business Case for CRM: Key Take-Aways and Open Q & A
Validating and making the business case for CRM is a critical first step. Take advantage of this final opportunity to make sure you clearly understand the road map to success.

Michael Smith, Vice President

Track C

C1. Top Capabilities for Multichannel Campaign Management
Multichannel campaign management is a critical connection point to an organization’s customers and prospects in good times and bad. Investments in multichannel campaign management in multiple areas such as e-marketing, inbound/outbound fusion, event-triggered marketing and social CRM can increase both efficiency and effectiveness, while increasing customer experience.

- What will drive multichannel campaign management for the next two years?
- How can organizations prioritize and leverage campaign management investment around efficiency and effectiveness?
- Which campaign management technologies will be best suited for world class campaign management in the medium term?

Adam Sarner, Research Director

C2. Case Study

C3. Mapping Sales Productivity to the Cloud

Michael Dunne, Vice President

C4. Sales Alchemy: Turning Lead Management into Gold
Customer acquisition and improving cross-sell/upsell rates are the number two and three priorities for business and IT executives. Unfortunately, redirecting the marketing budget to lead generation in an attempt to spur sales is the right idea, but the value of a higher volume of leads is diluted if effective lead management processes and metrics are not in place.

STRATEGIC PLANNING ASSUMPTION
By 2015, 30% of Global 2000 companies that focus on improving lead-management processes will increase revenue 5% to 10% through better qualification, prioritization, distribution, augmentation, allocation, tracking and closing of leads from multiple lead-generation sources. This session will show how improvements in lead management can increase top-line revenue by as much as 5% to 10%, and will discuss the organizational, process and technical challenges—and opportunities—that are emerging in this CRM segment.

Chris Fletcher, Research Director

C5. SaaS/Cloud Computing: CRM Game Changer or More of the Same?
Low total cost of ownership, quick deployments, and high-end user adoption are benefits typically cited with using software as a service for CRM applications. Yet many CRM SaaS deployments do not live up to these expectations. We will use a combination of user examples, models and decision frameworks to reveal the true value of using SaaS for CRM.

- Will SaaS/Cloud Computing really be the technology deployment disruptor it is hyped to be?
- How will CRM SaaS providers meet or exceed the business and technical needs of user organizations?
- What will be the best practices user organizations should take for leveraging software as a service for CRM?

Robert P. Desisto, Vice President and Distinguished Analyst

C6. Case Study

C7. The Business Impact of Social CRM: Marketing
Many customers go through similar buying processes when making purchases. Mass adoption of the Web channel among customers has shifted a typical buying process of need/want recognition, information search, evaluation, and purchase from an offline to an increasingly online activity. Within each stage of the buying process, social CRM for marketing will have an opportunity to improve the customer experience and influence the customer through all stages toward a purchase.

- What are the drivers fueling the growth of social CRM?
- How can companies develop customer relationships by deploying the right social application to fit the right business purpose?
- How will social technology change to support social CRM?

Adam Sarner, Research Director

C8. Not So Foolish: E-Commerce E-Mobile?
Customers use mobile devices that are increasing in capabilities to render your website or run your mobile applications. However, many are stumped as to how to drive sales from mobile devices. This session will address:

- How to determine if you organization is ready for mobile e-commerce?
- What mobile capabilities can your organizations leverage to help drive e-commerce sales?
- How can context-aware computing help drive sales and customer satisfaction?

Gene Alvarez, Vice President

Register by May 7 and save $300. Visit gartner.com/us/crm or call 1 866 405 2511.
C9. Establishing a Customer-Centric Culture: Key Take-Aways and Open Q & A

Key Take-Aways and Open Q & A: Now that you have what you need to establish and maintain a customer-centric culture, let’s go over your plan one last time to make sure you have the right steps and best practices.

Scott D. Nelson, Managing Vice President

Track D

D1. The Customer Service Processes and Technologies Most Critical to Your Organization

There is no substitute for a great product. But in an “experience economy,” a culture of great customer service is central to keeping loyal customers. We describe the trends and business applications that will most impact your ability to deliver great service.

Michael Maoz, Vice President and Distinguished Analyst

D2. Case Study

D3. How to Boost the Customer Experience

Customers have never been so willing to drop a supplier on the basis of one poor experience, and then tell as many people as they can. This presentation examines customer experience management, outlines the project types that boost the customer experience, helps devise a strategy to advance the cause of the customer, and provides guidance on where to start. Key issues include:

• What is a customer experience and how is its improvement measured?
• Which projects deliver the most positive customer experiences?
• How are organizations creating strategies for improving the customer experience?

Ed Thompson, Vice President and Distinguished Analyst

D4. What are the Do’s and Don’ts Around Implementing Customer Self-Service?

The Web has evolved from an interesting curiosity to a business necessity, and organizations find that they have to deal with what will—and what will not—make them successful online. Many enterprises are reluctant to make the needed investments in self-service websites, fearing that they will not achieve the results they expect. In the majority of cases, this belief could not be further from the truth. This presentation will explore what works and what does not work when deploying self-service on your websites. We will look at:

• What framework can be used for planning the web customer service initiatives?
• What are the best and worst practices in customer self-service?
• What business benefits can be achieved with the deployment of?

Action Item: Rather than focusing on a single channel as a solution to the overall buying process, enterprises must evaluate each step of the buying process against its available consumer channels and maximize the effectiveness of delivering each step at every channel level. The efficiencies of interaction and information-gathering offered by electronic channels should be leveraged to improve customer interactions at all channels.

Johan Jacobs, Research Director

D5. Website Usability and the Customer Experience

The customer-facing Web channel has great potential to achieve win-win scenarios for both the organization and its customers. While many organizations have been able to achieve success, many others find the Web channel to be underperforming, often due to usability shortfalls. New technology is seen as possible solution, but the real success factors have to do with a user-centered design process based on objective data about user behavior.

Ray Valdes, Vice President

D6. Case Study

D7. Exploiting Social Knowledge for Web Self-Service

Customer self-service is an active area of technology innovation, with technologies such as natural-language search, automated e-mail response systems and knowledge management in self-service replacing, labor-intensive interactions. This presentation explores what is in and what is out of self service, and how to use social knowledge and community knowledge when deploying a self-service solution. We will be looking at:

• What are the myths and realities around self-service?
• Where are business benefits to be gained when deploying self-service?
• Which vendors would you go to for self-service and the management of social knowledge?

Johan Jacobs, Research Director

D8. Social CRM: Where is it today and where is it going tomorrow?

Michael Maoz and Paul Greenberg present their views on how Social CRM has changed everything…and what it will do in the future.

Michael Maoz, Vice President and Distinguished Analyst; Paul Greenberg, Author and President of the 56 Group

Workshops

WK1. Shopping for E-Commerce Solutions

There are many e-commerce offers, ranging from building it on your own to outsourcing the whole operations. In this session attendees will learn:

• What are the keep factors to consider as part of the evaluation process?
• How to pick the right e-commerce solution for your organization?
• How to build an e-commerce request for proposal?

Gene Alvarez, Vice President
WK3. Creating a Culture of Commitment and Engagement on Your Team
As a follow-up to Patrick Lencioni’s keynote address on the importance of teamwork, Table Group Principal Consultants Al Amador and David Ross will offer specific advice and practical tools for overcoming the five dysfunctions of a team. In this interactive session, attendees will have an opportunity to complete a team assessment based on these dysfunctions, and a chance to review and discuss their results.
In addition, Al and David will tackle a prominent symptom of corporate frustration: silos, the invisible barriers that separate work teams, departments and divisions, and cause organizations to waste resources, kill productivity and jeopardize results. Drawing from Pat Lencioni’s popular book, *Silos, Politics, and Turf Wars*, the consultants will provide leaders with powerful advice on how to eliminate the structural obstacles that disrupt organizations. Urging leaders to provide a compelling context for their employees to work together, this model will give leaders a simple tool for enabling clarity, unity and alignment in their organization.

Al Amador, Principal Consultant, the Table Group; David Ross, Ph.D., Principal Consultant, the Table Group

WK4. Improving SFA Adoption for Competitive Advantage
For years sales organizations attempted to employ technology to improve sales results, with mixed results. Many projects were quickly crippled by low adoption rates. Such outcomes are intolerable in today’s uncertain business climate. During this workshop, participants will identify major issues that impact sales force automation (SFA) adoption and will work together to identify corrective measures. In summary, the following points will be addressed.
- Learn the leading causes of consistently poor adoption of SFA.
- Learn what approaches improve probabilities in successfully exploiting innovations in SFA.

Michael Dunne, Vice President

WK5. Workshop: How Do You Ensure Organizational Buy-In for CRM?
Effective CRM requires a high degree of change to organizational culture, behavior and collaboration. It involves changes to policies and directives that impact the entire organization, from marketing, sales, partner management and customer support all the way through to manufacturing, finance and the executive suite. It is critical to get everyone, from senior executives to line-level managers, to buy into your organization’s customer-centric vision for CRM. However, getting this cross-organizational buy-in for CRM initiatives is sometimes—possibly, always—challenging.
- Learn how to identify the major hurdles that get in the way of organizational CRM alignment.
- Identify the top issues that will command the attention of senior executives and ensure their support throughout your CRM project.
- Be able to identify the right metrics, key performance indicators (KPIs), and performance goals that will guide your implementation, quantify successes, and highlight areas that still need improvement.
- Determine a set of associated best practices that will promote ongoing organizational buy-in and drive executive support.

Chris Fletcher, Research Director

WK6. Mastering Your Customer Data and Creating a Single Source of Truth
This workshop focuses on how to create a single source of truth for customer data within the organization, using master data management (MDM) disciplines and technologies. This “single view of the customer” will enable better joined business processes, customer experiences and customer analytics. Attendees will engage with their peers and drill down into the subject with moderation and input from the Gartner analyst.
- Learn how to create a vision and strategy for an MDM program for customer data.
- Learn how create a business case for an MDM program for customer data.
- Learn how to leverage MDM best practices in the areas of governance, organization and process.
- Learn how to create an architecture and technology infrastructure for MDM.

John Radcliffe, Vice President

WK7. SaaS Total Cost of Ownership Workshop
Does SaaS lower Total Cost of Ownership? SaaS vendors promised lower cost of ownership versus on-premise deployments due to eliminating need for infrastructure, upgrade support, and complex system integration. However, Gartner has found this is not always the case. Our goal in this workshop is to have participants begin to create the framework for a TCO model to compare on-premise with SaaS. We will:
- Identify key components for the TCO model
- Tailor those key components to unique elements of participants business
- Discuss underlying input assumptions to the TCO model
- Share findings with the group on the TCO model structure

Robert P. Desisto, Vice President and Distinguished Analyst

WK8. Overcoming Organizational Inertia: Techniques to Drive Change Management for CRM
Process and technology improvements do not yield desired results unless the users understand and commit to a new way of working. This workshop will give delegates an opportunity to identify and share best practices for driving end-user change management.
- Learn what the top challenges are with “change.”
- Learn how each of these challenges can best be overcome.

Matthew Goldman, Vice President
Solution Showcase

Consider all the options before making important buying decisions

Market leaders and innovators in the CRM space will be on-site with informed representatives ready to answer your questions. This is the place to follow up on the information you’ve gathered at a solution provider or Gartner-led session.

- Become more informed on the latest products and services via turnkey exhibits.
- Engage a solution provider who can address your requirements.
- Walk away with a shortlist of vendors who meet your needs.

Sponsors (as of March 23, 2010)

Premier

Autonomy Corporation, a global leader in infrastructure software for the enterprise, spearheads the Meaning Based Computing movement. Autonomy’s technology allows computers to harness the full richness of human information, forming a conceptual and contextual understanding of all electronic data, including text, e-mail, Web pages, voice or video. Autonomy’s multichannel customer interaction analytics solution consolidates all customer interactions from contact center, website, storefront and social media, to identify patterns in customer behavior and improve the customer experience. http://www.autonomy.com/etalk

Platinum

Microsoft Dynamics CRM offers businesses of all sizes the ability to create and grow profitable customer relationships via a complete sales, service and marketing suite. Based on the familiar Microsoft Office Outlook user experience, Microsoft Dynamics CRM provides the easiest and most natural way to deliver powerful CRM capabilities from the applications that employees use every day. http://www.microsoft.com/crm

Oracle provides Enterprise Project Portfolio Management solutions for managing all critical business areas for project-driven companies. Organizations that rely on Oracle’s best-in-class integrated solutions can address project-based challenges across the enterprise and achieve absolute alignment between strategy, execution and results, while ensuring stakeholders have an accurate view of budgets, forecasts, milestones and progress.

Teradata

As the global leader in data warehousing and analytic technologies, Teradata solutions make smart companies smarter. Teradata gives companies the people, technology, innovation and a world-class network of customers and partners enabling them to gain competitive advantage to master their markets. With Teradata, the smartest wins. Learn more at http://www.teradata.com

Silver

Jive Software
Neolane, Inc.
Pegasystems Inc.
VeraCentra

Kiosk

Clarabridge
Portrait Software

Media Partners

IoT media
101media
KMWorld

Sponsorship opportunities

Dan Anibal
Account Manager
+1 203 455 0570
dan.anibal@gartner.com

Registration

Three easy ways to register

Web: gartner.com/us/crm
Phone: 1 866 405 2511
E-mail: us.registration@eventreg.com

Early-bird price

$1,795

Save $300. Applies if credit card payment is received by May 7. Fee includes conference attendance, documentation and planned functions. Standard price: $2,095

Bring your team and save

Teams that attend a Gartner summit together gain a richer experience of the event, so we’ve designed a special package that will help teams of three or more maximize their summit experience while on-site. Visit Registration & Pricing at gartner.com/us/crm for details on how you can save.

Start networking with us and your colleagues now

LinkedIn: Visit LinkedIn.com and search for the Gartner Customer Relationship Management (Xchange) group.
Twitter: twitter.com #gartnercrm

Justifying your attendance made simple

Our Attendee Justification Kit makes it easy to demonstrate the value of your summit experience. It includes a customizable letter, cost-benefit analysis, cost-optimization highlights, top 10 reasons to attend and more. Details: gartner.com/us/crm
gartnerinfo.com/eventsinsider

Gartner event tickets

We accept one Gartner conference ticket as full payment. If you are a current client with questions about tickets, please contact your sales representative.

Interested in becoming a Gartner client?
Phone: +1 203 316 1111
E-mail: client.info@gartner.com

twitter: @gartnercrm

Visit gartner.com/us/crm or call 1 866 405 2511.

June 28 – 30 • Los Angeles • gartner.com/us/crm

Gartner Customer 360 Summit

Special Gartner hotel room rate: $189 per night

We have reserved a limited block of rooms at the Hyatt Regency Century Plaza. As these rooms can only be held until May 31, we recommend you contact the hotel now. To obtain the special Gartner rate, inform the hotel that you are attending the Gartner Customer 360 Summit.

Hyatt Regency Century Plaza
2025 Avenue of the Stars
Los Angeles, CA 90067
Phone: +1 310 228 1234
Web: centuryplaza.hyatt.com

Hotel rates

- $189 per night

Sign up for the Gartner Applications Insider

Access complimentary research and event value all year

The Gartner Applications Insider is a monthly e-mail newsletter offering complimentary access to role-based content focused on the virtual enterprise. Each monthly newsletter showcases insight from Gartner research along with industry data and best practices from Gartner Events. Special features of the newsletter include:

- Complimentary Gartner research
- Webinars
- Podcasts
- Upcoming events and special offers
- Survey and poll results from peers

Sign up today at gartnerinfo.com/eventsinsider. See our other role-based newsletters for the latest Gartner insight on all your key initiatives.

Register by May 7 and save $300.
Gartner Customer 360 Summit
CRM Strategies and Technologies to Understand, Grow and Engage Customers

June 28 – 30 • Los Angeles, CA • Hyatt Regency Century Plaza • gartner.com/us/crm

Renewed focus on:
• Business and IT collaboration
• Social CRM
See page 8 for agenda details

Early-bird savings
Register by May 7 and save $300!

3 easy ways to register
Web: gartner.com/us/crm
Phone: 1 866 405 2511
E-mail: us.registration@eventreg.com

Priority code:

© 2010 Gartner, Inc. and/or its affiliates. All rights reserved. Gartner is a registered trademark of Gartner, Inc. or its affiliates. For more information, e-mail info@gartner.com or visit gartner.com.