Gartner Outsourcing & Strategic Partnerships Summit 2013

September 23 – 25
Orlando, FL
gartner.com/us/outsourcing

HOT TOPICS

Plan for the future of IT services
Lower your costs with cloud services
Align sourcing and business goals
Gain more value from vendors
Negotiate better contracts for business impact
Go to page 8 for details.

EARLY-BIRD DISCOUNT Register by July 26, 2013 and save $300
From the desk of Helen Huntley

Take a step back. View your sourcing initiatives with fresh eyes.

To keep pace with the speed of emerging technologies and business demand, many organizations are compelled to evolve their sourcing strategies as rapidly as possible. How can enterprises like yours effectively support business and IT demands amid today’s tremendous challenges: economic pressures, business disruption, technology change and new IT delivery models? Are you prepared to reimagine sourcing to better align delivery with business needs, embrace new technologies, evolve sourcing partnerships and select optimum providers delivering around the globe?

**Gartner Outsourcing & Strategic Partnerships Summit 2013** urges you to rethink your current sourcing approaches with these three distinct purposes in mind:

- Aligning sourcing strategies with business goals and your strategic partners
- Innovating sourcing practices to realize goals and deliver greater business value
- Executing in a more disciplined fashion across the entire sourcing life cycle — from strategy development to vendor selection, evaluation and performance, and managing an optimal sourcing environment. Join us in Orlando this September.

Sincerely,

Helen Huntley
Vice President and Conference Chair
The reasons to attend have never been more urgent

Transformational forces, along with innovative business models, are causing sourcing leaders to re-evaluate their sourcing options, delivery models, contracts, and vendor management. Much is at stake. In fact, a failure to exploit new sourcing opportunities may jeopardize your organization’s ability to move quickly and optimize future business performance.

Delivering role-specific content for CIOs, IT leaders and sourcing executives, our 2013 agenda offers actionable guidance to ensure your sourcing activities are effectively integrated with business goals to achieve the outcomes your enterprise is banking on. Your take-away: informed decision making that minimizes the costs and risks of sourcing while maximizing business value.

Get ready to engage in new thinking you won’t find anywhere else on sourcing issues and challenges, and best practices that matter most.

Who Should Attend

- CIOs
- COOs, CFOs
- Chief sourcing officers, heads of outsourcing
- Sourcing managers
- Vendor managers
- Contract managers
- Procurement managers
- Business unit managers
- Global delivery managers, global sourcing managers

Divide and conquer!

With dedicated tracks for CIOs, sourcing/contract managers and vendor managers, the summit covers the hottest issues for your entire sourcing organization. See the benefits of our Team Attendance Program on Page 27.

Visit gartner.com/us/outsourcing for agenda updates and to register
KEYNOTE SESSIONS

Guest keynotes

Keith Ferrazzi  
CEO, Ferrazzi Greenlight; Author of “Who’s Got Your Back” and “Never Eat Alone”

Collaboration and Innovation for Team Success
In this keynote presentation, Keith Ferrazzi discusses his long-established practices around changing organizational behavior at more than a dozen Global 500 companies. He describes how coaching to increase trust and collaboration has improved the effectiveness of the leadership teams in these organizations. This presentation gives you:

- A systematic approach for collaborative problem-solving
- Methods for creating an environment where innovation and creativity can flourish
- The Relationship Action Plan (RAP), which helps to identify and build optimization strategies around the relationships critical to your team’s success
- A framework for building a relational culture in your organization

UNthink
Somehow we’ve come to believe that creativity is reserved for the chosen few — the poets, the painters, the writers. The truth is bigger and better than that. Creativity is in all of us. We simply need to rediscover the keys that will unlock our potential. This keynote pushes you beyond your traditional thought patterns and habitual levels of performance, and inspires you to realize that you are capable of so much more than you have been led to believe. It helps you to:

- Step outside convention to discover new and unexpected solutions to business challenges
- Challenge preconceived notions about what’s possible
- UNthink your way to increased creativity, productivity and passion

Erik Wahl  
Artist, Author and Entrepreneur

UNthink

ADVISORY BOARD

The Gartner Outsourcing & Strategic Partnerships Summit operates with the advice and input of a number of individuals from end-user organizations, who help to guide the content and direction of the summit and ensure that the agenda addresses the needs of the audience. We would like to thank the following individuals for their ongoing advice and support:

- Ann Friedel, Vendor Relationship Specialist, MetLife Global Operations
- Betsy Sirk, Directorate IT Manager and Vendor Manager, NASA
- Mel Brown, ITSM Process and Supplier Manager, Bristol-Myers Squibb
- Tracy L. Fitzke, Gates IT Global Sourcing and Contract Manager, Gates Corporation
- Cassandra “Sandy” Pullin, Director, IT Supplier Management, NiSource Corporate Services Company
- John Ralph, EVP, IT, Reliance Insurance
- Vicki Briggs, Business Systems Portfolio Management, Sourcing Team Lead, Boeing
Gartner keynotes

The End of Outsourcing As We Know It
Linda R. Cohen, Vice President and Distinguished Analyst; Helen Huntley, Vice President; Ian Marriott, Vice President; Frank Ridder, Vice President

Globalization, IT services industrialization, consumerization and the Nexus of Forces (social, mobile, cloud and information) are quite literally changing the world. The impact on IT will be dramatic, but what are you doing about it? This keynote evaluates how outsourcing will change, driven by these major trends, and includes examples of changes that we are witnessing already. Could this herald the end of outsourcing as we know it?

Leading Business Change: Negotiate Political Land Mines
Tina Nunno, Vice President and Distinguished Analyst

Organizational politics are daily realities that often go unspoken and unaddressed. Those who seek to lead change are certain to encounter political challenges. Often, the success of a project or initiative is dependent upon the ability of the leader to identify and negotiate political land mines.

This keynote focuses on defining what politics really is, and identifying the key political land mines we all encounter when attempting to create change.

- Why is understanding politics an important part of leading change?
- What are the four political land mines leaders will encounter?
- How can leaders best deal with the land mines to help accelerate change?

Key Take-Aways to Drive Sourcing Success
Helen Huntley, Vice President and Conference Chair

This year’s summit agenda focuses on how to effectively align sourcing with the business and with strategic partners, convert innovative approaches into successful outcomes, and execute on new thinking amid economic turbulence and disruptive, fast-evolving technology change. This session gives you the significant key take-aways from the summit, so you are better prepared to deal with today’s sourcing challenges and tomorrow’s realities.
Gartner analysts draw on the real-life challenges and solutions experienced by clients from 13,200 distinct organizations worldwide.

<table>
<thead>
<tr>
<th>Name</th>
<th>Position</th>
<th>Focus Areas</th>
</tr>
</thead>
<tbody>
<tr>
<td>David Edward Ackerman</td>
<td>Director</td>
<td>Contract and deal development; service-level agreements; benchmarking and performance management; vendor selection</td>
</tr>
<tr>
<td>Christopher Ambrose</td>
<td>Vice President</td>
<td>Applications outsourcing; sourcing strategies and contracting; vendor performance and relationship management</td>
</tr>
<tr>
<td>Ed Anderson</td>
<td>Director</td>
<td>Cloud services (IaaS, PaaS, SaaS); cloud market sizing, trends and forecast; IT services</td>
</tr>
<tr>
<td>Alexa Bona</td>
<td>Vice President and Distinguished Analyst</td>
<td>Trends in software licensing and pricing and maintenance; SaaS and cloud contracting; negotiating software license agreements with Microsoft, Oracle and SAP</td>
</tr>
<tr>
<td>Steven Buckley</td>
<td>Vice President, Gartner Consulting</td>
<td>Sourcing strategy; provider selection; sourcing management</td>
</tr>
<tr>
<td>Bryan Britz</td>
<td>Vice President</td>
<td>IT outsourcing marketplace; service provider evaluation and comparison; IaaS; infrastructure outsourcing; industrialized IT services</td>
</tr>
<tr>
<td>Linda R. Cohen</td>
<td>Vice President and Distinguished Analyst</td>
<td>Sourcing strategy; multisourcing; sourcing and vendor management; cloud sourcing strategy and governance</td>
</tr>
<tr>
<td>Claudio Da Rold</td>
<td>Vice President and Distinguished Analyst</td>
<td>Sourcing strategy; outsourcing market dynamics; alternative delivery models; IT infrastructure utility; IT services industrialization; industrialized low-cost services</td>
</tr>
<tr>
<td>Eric Goodness</td>
<td>Vice President</td>
<td>Customer and vendor outsourcing; IT services issues surrounding business communications; multisingourcing competencies; go-to-market planning; sales and channel strategy</td>
</tr>
<tr>
<td>Helen Huntley</td>
<td>Vice President and Conference Chair</td>
<td>Sourcing strategy; evaluation and selection; contract development and negotiations; vendor management; transitions; domestic, rural, nearshore and offshore/global delivery</td>
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<tr>
<td>Ruby Jivan</td>
<td>Director</td>
<td>Services outsourcing strategy (IT and BPO); supplier evaluation and selection; vendor management; process optimization and offshore delivery management</td>
</tr>
<tr>
<td>Frances Karamouzis</td>
<td>Vice President and Distinguished Analyst</td>
<td>Strategy; business case analysis; shared-service centers; application development and outsourcing; applications services, including SaaS and offshore/global delivery</td>
</tr>
<tr>
<td>Jim Longwood</td>
<td>Vice President</td>
<td>Evaluation and selection; contract negotiations; deal management; SLAs; OLAs; methodologies, outsourcing and IT services in Asia/Pacific; offshore country analysis</td>
</tr>
<tr>
<td>Ian Marriott</td>
<td>Vice President</td>
<td>Offshore outsourcing; global delivery models; outsourcing and IT services in EMEA</td>
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<tr>
<td>William Maurer</td>
<td>Vice President</td>
<td>Contract and deal development (SLAs); performance management; vendor selection</td>
</tr>
</tbody>
</table>
Sandra Notardonato  
Vice President and Invest Analyst  
FOCUS AREA: Equity analysis of offshore, consulting, business services and government IT services companies

Tina Nunno  
Vice President and Distinguished Analyst  
FOCUS AREAS: Organizational politics; board and executive communications; IT governance; IT strategic planning; business value of IT; program and portfolio management

Frances O’Brien  
Vice President and Distinguished Analyst  
FOCUS AREAS: Microsoft licensing and pricing; MS Office 365 contracting; IT asset management

Gregor Petri  
Director  
FOCUS AREAS: Cloud computing; cloud services brokerage; IaaS; cloud sourcing; cloud migration strategies, hosting, co-location

Kurt Potter  
Vice President and Distinguished Analyst  
FOCUS AREAS: Transformation with IT transparency; cost optimization; new economics of IT; benchmarking; chargeback; performance management; portfolio management; IT services

Neil Rickard  
Vice President  
FOCUS AREAS: Network sourcing; evaluation and selection of network service providers; network services contracting

Frank Ridder  
Vice President  
FOCUS AREAS: Contract and deal development; vendor management; vendor selection; infrastructure utilities; IaaS; cloud sourcing; sourcing strategy; infrastructure outsourcing

Eric Rocco  
Managing Vice President  
FOCUS AREAS: General services strategy; services market dynamics; service provider go-to-market strategies; general outsourcing trends; product support services

Alex Soejarto  
Vice President  
FOCUS AREAS: Strategic development and growth in IT services; buyer trends for consulting and SI services; selection of and contracting with consulting and SI companies

Gayla Sullivan  
Director  
FOCUS AREAS: Vendor management; procurement; sourcing; contract negotiation/management; cloud and SaaS-based contracting and managing megavendors

Patrick J. Sullivan  
Vice President  
FOCUS AREAS: Application services market, including consulting, implementation, testing and application management; CRM-related services; service provider competencies and competitive strategies

Susan Tan  
Director  
FOCUS AREAS: Consulting and system integration market trends and competitive landscape; SAP implementation services; mobile application services

Cathy Tornbohm  
Vice President  
FOCUS AREAS: Business process outsourcing (BPO); finance and accounting BPO; alternative delivery models; business process utility

Gianluca Tramacere  
Vice President  
FOCUS AREAS: Outsourcing market dynamics; evaluation and selection of service providers; global delivery

Gilbert van der Heiden  
Vice President  
FOCUS AREAS: Sourcing strategy; vendor selection; contracting; vendor management; application and testing services and metrics; operating level agreements

Edward Wilson-Smythe  
Senior Director, Gartner Consulting  
FOCUS AREAS: Outsourcing strategy; BPO; platform-based services; cloud sourcing; alternative outsourcing models; sourcing-driven transformation

Morgan Yeates  
Director  
FOCUS AREAS: Business process outsourcing (BPO) — services, forecast and Hype Cycle; HR BPO; maverick research

Allie Young  
Vice President and Distinguished Analyst  
FOCUS AREAS: IT services market; application services market/competition, application modernization; offshore/global delivery and rural sourcing; Latin America services

Visit gartner.com/us/outsourcing for agenda updates and to register
### AGENDA TRACKS

## Reimagine and rejuvenate your sourcing initiatives

### A  CIOs and Senior Leaders: Growing and Succeeding in a Digital World

Digital business models create huge opportunities and fierce global competition requires fast, business-driven service sourcing decisions. Your IT modernization projects can’t wait. You need to understand relevant forces, trends and options right now. This track shows CIOs how to extend sourcing governance and implement time-driven and adaptive sourcing strategies.

#### Hot topics by track
- Digital transformation
- Re-insourcing and cloud services
- IT services industrialization and consumerization
- Strategic IT cost optimization

### B  Sourcing and Contract Managers: Selecting, Evaluating and Contracting for Optimal Deals

The outsourcing market is plagued by ineffective and expensive deals. You need to understand dynamic changes in delivery options, pricing and contracting. This track presents clear, actionable advice on how to establish new deals or recalibrate existing ones to realign with business needs or new delivery options.

#### Hot topics by track
- Vendor evaluation/selection
- Contract negotiation/renegotiation
- Transition planning
- Negotiating with the megavendors

### C  IT Vendor Managers: Optimizing Your IT Vendor Ecosystem

IT vendors form an important ecosystem in any enterprise and are crucial to success. IT vendor management must transform from transactional, event-driven activities to a more disciplined process that better exploits strategic partners’ capabilities. This track focuses on maturing your vendor management and outcome-based business metrics, and maximizing vendor relationship value.

#### Hot topics by track
- Developing strategic relationships
- Vendor performance management and analytics
- Getting the right balance of providers

### D  Activating the Next-Generation Enterprise With Cloud and Industrialized Services

Cloud computing workloads are being adopted at a disruptive pace, but cloud is rarely the best solution for all workloads. The resulting hybrid IT management requires new technologies to connect clouds and sophisticated approaches to data classification and service-oriented architecture. This track explores new delivery options.

#### Hot topics by track
- Pricing trends and methodologies
- Crowdsourcing
- Managing a hybrid IT environment
- Data center managed services
- Managed mobility services
- Plotting a road map to the cloud

### Practical Outsourcing: Workshops, Clinics and Roundtables

Business and IT professionals increasingly need to benchmark themselves against best practices and discuss the practical aspects of outsourcing with their peers. In these in-depth, analyst-facilitated workshops, contract negotiation clinics and roundtables, attendees work together to identify best practices and share practical ideas and tips.

#### Hot topics by track
- Measuring business value
- Negotiating contracts
- Assessing the health of a deal
- Cost optimization techniques
- Maturing a vendor management program
SUMMIT FEATURES

Experience the power of Gartner research — live

Analyst one-on-ones
Private 30-minute consultations with a Gartner analyst provide targeted, personalized advice to help you plan proactively and invest wisely (preregistration required).

Analyst-user roundtables
These topic-driven end-user forums are moderated by Gartner analysts. Learn what your peers are doing around particular issues and across industries (preregistration required).

Workshops and clinics
Immersive sessions designed to advance your skills with how-to knowledge in a small group setting (preregistration required).

Solution provider sessions
An exclusive look at how new solutions and services work in the real-world of sourcing. Client case studies provide valuable insights.

Case studies
Personal challenges, issues, lessons learned, best practices. Hear it all from industry leaders as they discuss the do’s and don’ts of planning and implementing a range of sourcing programs.

Peer-to-peer networking
Perfect ways to benchmark your progress, share insights, challenge your assumptions. Access the collective knowledge and experience of your peers at range of networking forums.

Gartner Magic Quadrant sessions
Incisive summaries of today’s outsourcing market and its players in special analyst-led presentations delivered on the show floor.

ATTENDING FOR THE FIRST TIME?

• Establish strong foundations for sourcing success
• Respond to the increasingly complex IT services ecosystem
• Learn to adapt to new technology and service offerings, accelerated changes in delivery options and an expanded pool of outsourcing locations
• Discover how to benefit from new technologies and provider options
• Learn new vendor selection and contracting techniques to ensure successful deals
• Create vendor management programs that drive consistent business results
• Validate your sourcing strategies and tactics to avoid costly breakdowns

WHY RETURN?

This year’s summit delivers new, enhanced content that will enable you to:

• Rethink your sourcing strategies to align better to the needs of your business, to enable innovation and to execute sourcing best practices
• Spark new ideas and identify new best practices with your peers in our significantly expanded program of workshops, roundtables and ideas exchanges
• Negotiate for better ROI and reduced risk
• Take advantage of opportunities and risks presented by the convergence of cloud, social, information and mobile

TWO SUMMITS, ONE WEEK

Gartner is holding the Outsourcing & Strategic Partnerships Summit back-to-back with the IT Financial, Procurement & Asset Management Summit, September 23 – 27, 2013.

Extend your stay to expand your learning.

Get a comprehensive view of the entire vendor life cycle. Understand the full dynamics of the marketplace — from different pricing methodologies and contract styles to knowing which provider and delivery option can deliver the greatest value.

Save $950 on the standard conference rate when you register at gartner.com/us/ositam
AGENDA AT A GLANCE

Sunday, September 22

2:00 p.m.  Registration
2:30 p.m.  T1. Establishing a Vendor Management Mission/Charter: What Works Best for Your Organization? 
            Helen Huntley
3:30 p.m.  Coffee Break
3:45 p.m.  T4. Offshore Tutorial: Getting Your Offshore Services Approach Right 
            Ian Marriott
4:45 p.m.  Networking Coffee Break
5:15 p.m.  T7. Understand Outsourcing Pricing Models: Traditional and Cloud Services 
            Jim Longwood

Monday, September 23

7:00 a.m.  Registration
7:00 a.m.  Networking Breakfast
8:00 a.m.  FF1. 60 Seconds or Bust: Summit Solution Snapshots 
            Eric Rocco
9:00 a.m.  K1. Gartner Keynote  The End of Outsourcing As We Know It 
            Linda R. Cohen, Helen Huntley, Frank Ridder, Ian Marriott

Track A

10:30 a.m.  A1. Advanced Sourcing Strategies: How the Back Office Funds Front-Office Competitiveness 
            Claudio Da Rold
11:45 a.m.  A2. To the Point: Real Life Examples of Outcome-Based Managed Services 
            Frances Karamouzis

Track B

11:45 a.m.  B1. End-Users Outsourcing: Transform Complexity Into an Opportunity or Lag Behind GianLuca Tramacere
12:15 p.m.  B2. To the Point: Creating and Executing a Comprehensive Transition Plan 
            Helen Huntley

Track C

12:15 p.m.  C1. Effective Vendor Management in a Cloudy World 
            Linda R. Cohen
12:45 p.m.  C2. To the Point: Vendor Intelligence — Harvesting Big Data Opportunities in Vendor Management 
            Gayla Sullivan

12:15 p.m.  Attendee Lunch and Solution Showcase Dessert Reception
12:45 p.m.  M01. Data Center Magic Quadrant 
            William Maurer

2:15 p.m.  A3. Succeed With Outsourcing at the Intersection of the Nexus of Forces 
            Frank Ridder
2:45 p.m.  A4. IT Cost Optimization and Outsourcing: Overthinking the Obvious 
            Kurt Potter
3:15 p.m.  A5. To the Point: How to Align BPO With Your Business Shared-Service Center, IT and Cloud Strategies 
            Cathy Tornbohm
3:45 p.m.  A6. The End of Outsourcing As We Know It 
            Linda R. Cohen, Helen Huntley, Frank Ridder, Ian Marriott

3:30 p.m.  M02. SAP Implementation Magic Quadrant 
            Susan Tan
4:00 p.m.  M03. Oracle Implementation Magic Quadrant 
            Alex Soejarto
<table>
<thead>
<tr>
<th>Track D</th>
<th>Activating the Next-Generation Enterprise With Cloud and Industrialized Services</th>
<th>Workshops and Clinics (1 hour 45 minutes each)</th>
<th>Analyst-User Roundtables (60 minutes each)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>William Maurer</td>
<td>Gianluca Tramacere, William Maurer</td>
<td>David Edward Ackerman</td>
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<tr>
<td>D2.</td>
<td>To the Point: Planning Your SaaS Implementations — The Differences Between SaaS Deployments vs. Conventional On-Premises Implementations</td>
<td>W2. Leveraging Cloud Assessment as Part of Your Sourcing Strategy</td>
<td>AUR2. How to Be a Sophisticated BPO Client</td>
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<tr>
<td></td>
<td>Patrick J. Sullivan</td>
<td>Steven Buckley, Ed Anderson</td>
<td>Cathy Tornbohm</td>
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<td>D3.</td>
<td>Charting Your Road Map to the Cloud</td>
<td>W3. How to Pick the Right Data Center Outsourcing or Cloud IaaS Provider</td>
<td>AUR3. Deriving Value From Your Oracle Services Provider</td>
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<td>Gregor Petri</td>
<td>Claudio Da Rold</td>
<td>Alex Soejarto</td>
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<td>Helen Huntley</td>
<td>Chris Campbell, Frank Rieder</td>
<td>Frances Karamouzis, Sandra Notardonato</td>
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<td>D5.</td>
<td>To the Point: Can Outsourcers Really Manage a Hybrid IT Environment?</td>
<td>W5. Four Key Risks in Developing and Executing a Cloud Strategy</td>
<td>AUR5. Cloud Migration or Cloud Migraine: A Self-Help Group for the Brave and the Wise</td>
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<td>Edward Wilson-Smythe</td>
<td>Gregor Petri</td>
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<td>AUR6. Cost Optimization Techniques</td>
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<td>Kurt Potter</td>
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</tbody>
</table>

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Tuesday, September 24

7:00 a.m. Registration
7:00 a.m. Networking Breakfast
8:00 a.m. K2. Guest Keynote  Collaboration and Innovation for Team Success  Keith Ferrazzi, Founder and CEO of Ferrazzi Greenlight, Greenlight Research Institute
9:00 a.m. Networking Coffee Break
9:30 a.m. Solution Provider Sessions
10:15 a.m. A6. Establishing Effective Outsourcing Governance — It's Now or Never! Linda R. Cohen
11:30 a.m. A7. To the Point: How Service Providers Will Use Analytics to Impact Industrialized Service Outcomes Alex Soejarto
12:00 p.m. Attendee Lunch and Solution Showcase Dessert Reception
12:30 p.m. K5. Gartner Keynote    Key Take-Aways to Drive Sourcing Success
12:05 p.m. AGENDA AT A GLANCE

9:30 a.m. Solution Provider Sessions
9:00 a.m. K3. Guest Keynote  Leading Business Change: Negotiate Political Landmines  Tina Nunno
10:45 a.m. A9. Rural and Low-Cost Domestic Sourcing: The Offshore Alternative Alie Young
11:15 a.m. A10. To the Point: The CIO’s Guide to Global Delivery — Strategies for 2014 and Beyond Ian Marriott
11:30 a.m. A7. To the Point: How Service Providers Will Use Analytics to Impact Industrialized Service Outcomes Alex Soejarto
11:55 a.m. Networking Break
12:30 p.m. MQ4. End-User Services Magic Quadrant  David Edward Ackerman
2:00 p.m. A8. Case Study: Valley — Building the Case for Reclaiming Ownership of Services Dan Schmelzer MBA, Manager Sourcing Transformation, IT, Vale
2:45 p.m. A9. Rural and Low-Cost Domestic Sourcing: The Offshore Alternative Alie Young
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6:45 p.m. A8. Case Study: Valley — Building the Case for Reclaiming Ownership of Services Dan Schmelzer MBA, Manager Sourcing Transformation, IT, Vale

Wednesday, September 25

7:00 a.m. Breakfast
8:00 a.m. K3. Guest Keynote  Leading Business Change: Negotiate Political Landmines  Tina Nunno
8:50 a.m. K4. Guest Keynote  UNthink  Erik Wahl, Artist, Author and Entrepreneur
10:15 a.m. Solution Provider Sessions
10:45 a.m. B11. Desktop as a Service Opportunities 2014–2019: Moving From Niche to Mainstream — Or Not William Maurer
11:15 a.m. K5. Gartner Keynote  Key Take-Aways to Drive Sourcing Success  Helen Huntley
11:55 a.m. Networking Break
12:05 p.m. K5. Gartner Keynote  Key Take-Aways to Drive Sourcing Success  Helen Huntley
<table>
<thead>
<tr>
<th>Time</th>
<th>Session</th>
<th>Location</th>
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<tbody>
<tr>
<td>9:00 a.m.</td>
<td>Networking Coffee Break</td>
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<td>Keynote: UNthink, Erik Wahl</td>
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<td>10:15 a.m.</td>
<td>Keynote: Modernization, Patrick J. Sullivan, Allie Young</td>
<td>K4</td>
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<td>10:15 a.m.</td>
<td>Case Study: The Future of Data Center Managed Services, Bryan Britz</td>
<td>D6</td>
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<td>C11</td>
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<td>Keynote: The Business Value of Testing Services, Gilbert van der Heiden</td>
<td>B8</td>
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<tr>
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<td>Keynote: Collaboration and Innovation for Team Success, Helen Huntley</td>
<td>H2</td>
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A1. Advanced Sourcing Strategies: How the Back Office Funds Front-Office Competitiveness

Business leaders’ focus on growth makes CIOs responsible for two business-critical initiatives: evolving the front office toward digital value networks and reducing back-office inefficiency. This session identifies how to use sourcing models such as service integration, joint ventures and re-insourcing.

• How can CIOs exploit past inefficiencies to fund digital transformation?
• How do you leverage models such as selective sourcing, service integration, and joint ventures?
• What is the role of re-insourcing and cloud services while rethinking outsourcing?

Claudio Da Rold

A2. To the Point: Real-Life Examples of Outcome-Based Managed Services

Significant changes continue to pervade IT services and sourcing — specifically, IT service industrialization and consumerization of services. These changes give rise to new offerings, commercial terms and delivery structures. This session showcases examples of offerings along the spectrum of industrialization and consumerization which may be structured as outcome-based managed services.

• How does Gartner define outcome-based managed services?

Frances Karamouzis

A3. Succeed With Outsourcing at the Intersection of the Nexus of Forces

The Nexus of Forces is the convergence and mutual reinforcement of social, mobile, cloud and information trends in IT. The impact on the outsourcing marketplace is significant. This presentation discusses new challenges and opportunities, and what organizations and service providers must do now.

• What is it? The Nexus of Forces and its challenges for outsourcing
• What is the impact? How will sourcing ecosystems have to change?
• How to reap the benefits: What should sourcing and IT executives do?

Frank Ridder

A4. IT Cost Optimization and Outsourcing: Overthinking the Obvious

Five years of economic uncertainty have left fewer easy opportunities for IT cost optimization. Reimagining IT and sourcing will be required. To make better decisions and set the right expectations with stakeholders, IT leaders must increase the level of transparency for outsourcing deals and all of IT.

• What are the strategic trends for IT cost optimization in IT and outsourcing?
• Where does IT financial transparency fit into the maturity of IT cost optimization?
• What are the risks unearthed due to uninformed cost optimization?

Kurt Potter

A5. To the Point: How to Align BPO With Your Business Shared-Service Center, IT and Cloud Strategies

High on a CIO’s list of tasks are to rationalize applications and to determine the optimal ecosystem to surround an ERP — while exploiting
the cloud. This session explores how these issues align to BPO, how BPO can help — and where it can’t!

- What is the current vogue for BPO, shared-services centers and IT?
- How can IT be exploited in BPO?
- How is the cloud being deployed to support this?

Cathy Tornbohm

A6. Establishing Effective Outsourcing Governance — It’s Now or Never!
The need for outsourcing governance has never been more critical, as cloud adoption accelerates by both IT and business users. Most organizations are still struggling to effectively implement sourcing governance across the enterprise without “locking down” the enterprise.

- How can you establish the authorities around effective outsourcing governance?
- What IT sourcing principles can be developed to allow for flexibility, but still assure reasonable control?
- What processes and tools are best utilized to sustain effective outsourcing governance?

Linda R. Cohen

A7. To the Point: How Service Providers Will Use Analytics to Impact Industrialized Service Outcomes
Service providers are becoming more proactive in their response to complaints of low customer satisfaction, quality control and service offering outcomes. Using the same techniques offered clients, service providers are on a path to raise the level of engagement with clients.

Alex Soejarto

A8. Case Study: A New Riding Partner — The Outsourcing Journey of Harley-Davidson IT
Harley-Davidson Motor Company is transforming into a high-performing, global entity focused on manufacturing excellence, product development “wow,” and an unparalleled customer experience. To accomplish this goal, Harley-Davidson Global Information Services (IS) had to change the way it developed and delivered solutions and services to its customers … a change that included the introduction of a new outsource partner. This session describes the outsourcing journey taken by Harley-Davidson IS.

- What was the catalyst for Harley-Davidson’s IS transformation?
- How did the transition to an outsource partner go?
- What are some of the unique outcomes and results?

Richard Strong, Director, Global Information Services, Harley-Davidson Motor Company

A9. Rural and Low-Cost Domestic Sourcing: The Offshore Alternative
As U.S. CIOs and sourcing executives seek to further optimize their sourcing strategies, many are turning to providers that offer a U.S.-centric delivery strategy. This session explores the use of domestic rural sourcing, and how to capitalize on low-cost domestic delivery, especially in the U.S.

- What are clients’ expectations from a U.S. low-cost or rural-sourcing delivery model?
- Which providers actually offer this delivery model and how do you evaluate them?
- What are some examples of successful U.S. onshore sourcing engagements?

Allie Young

A10. To the Point: The CIO’s Guide to Global Delivery — Strategies for 2014 and Beyond
This session identifies emerging opportunities across global locations, explores effective management approaches for different delivery models, and examines the appropriate balance between offshore and cloud-based services.

- Which are the leading locations for an effective global delivery model?
- How do you build a strategy for managing a geographically dispersed footprint of delivery locations?

Ian Marriott

A11. Revitalize Your Business With Application Modernization
Application modernization is being driven by business demand for enhanced functionality, requiring changes to legacy applications — not simply cost reduction. The Nexus of Forces brings opportunities to businesses, but requires existing portfolios and platforms to adapt to these technologies.

Visit gartner.com/us/outsourcing for agenda updates and to register
• What are the latest application modernization strategies?
• How can application modernization enable business growth and competitiveness?
• How can application modernization increase existing applications’ business benefits?

Patrick J. Sullivan, Allie Young

B1. End-Users Outsourcing: Transform Complexity Into an Opportunity or Lag Behind
To raise efficiency and provide tangible business value, end-users outsourcing services must change their shape and value proposition. Mobility, consumerization/BYOD, big data and cloud require innovative solutions based on users’ profiles and related business priorities.
• What are the major forces and trends shaping the end-users outsourcing market?
• How are providers positioned in the vendor landscape?
• What are the traits of innovative offerings and lessons learned by clients?

Gianluca Tramacere

B2. To the Point: Creating and Executing a Comprehensive Transition Plan
In today’s dynamic multisourcing world, no matter what you do, there is a transition in your future. With each transition, the organization will be disrupted, creating challenges in achieving expected business results. This presentation addresses critical components that must be addressed to reduce risks:
• What components should be included in a transition management plan?
• Who is responsible for the creation, execution and funding of transition plans?
• What are the steps in transition, and how ready are you to undertake the journey?

Helen Huntley

B3. The Land Grab for BPO: The Battle for Control Between CIOs and Business Leaders
Like the land grabs for Africa or the American West, everyone wants control of the BPO territory and its budget — CIOs, business unit leaders, procurement, marketing. But who’s gaining ground? This presentation explores:
• How the shift in BPO decision-making authority will bring fragmentation of IT strategy, policy, governance and risk
• It’s new role as an internal advisor as its budgets migrate to the business units
• Obstacles arising from the enterprise’s culture, politics, technologies and previous BPO experience

Morgan Yeates

B4. Negotiating With the Software Megavendors: IBM, Microsoft, Oracle and SAP
CIOs struggle to negotiate effective pricing and contracts with big software vendors like Microsoft, Oracle, IBM and SAP. We offer CIOs effective negotiating strategies and advise them on how to orchestrate a successful contract with these big four, in the context of new trends and technologies in the market.
• What are the key trends influencing software licensing and pricing?
• What are your key areas of leverage with IBM, Microsoft, Oracle and SAP?
• What are the key terms and conditions to negotiate with IBM, Microsoft, Oracle and SAP?

Alexa Bona

B5. To the Point: Cutting Through the Fog in Microsoft Office 365 Cloud Negotiations
Driven by the consumerization of IT, cloud, mobile and social trends that are reshaping global work practices, Microsoft is betting its future on Office 365 and other cloud offers. But transitioning from a traditional software supplier to a cloud vendor is fraught with peril. This presentation focuses on contracting issues and best practices when subscribing to Microsoft’s Office 365.
• What are the key trends in Microsoft Office 365 contracting?
• What are the criteria for structuring a successful deal?
• How can you negotiate effectively with Microsoft?

Frances O’Brien

B6. Negotiating With and Managing the New Guard of Suppliers: Amazon, Apple, Google and Workday
CIOs may be relieved at seeing a new guard of suppliers, but many of them came from a consumer heritage or have much more standardized business practices which will need to be managed differently from a negotiation and vendor management perspective. This presentation discusses how to
negotiate and manage some of these new suppliers, including Apple, Google and Workday, and answers the question, how can IT sourcing leaders effectively negotiate with and manage the new guard of IT suppliers?

Alexa Bona

**B7. To the Point: Getting the Most Out of Your Staff Augmentation Deals**

Staff augmentation is a great way to flexibly leverage IT resources. To maximize the value of staff augmentation you have to use these resources correctly, with an appropriate contract and governance structure that gets the most out of the relationship.

- What are the best uses for staff augmentation?
- How do I establish the best contract and governance for this delivery option?

Helen Huntley

**B8. Case Study: Vale — Building the Case for Reclaiming Ownership of Services**

Vale, one of the world’s largest mining companies, is shifting an IT as a service (ITaaS) sole-sourcing model toward an operational sourcing model that preserves the ownership of services to ensure alignment with business strategy. This session describes the dramatic transformation, focusing on:

- Vale’s original strategy — an all-inclusive, global, centralized “subscriber” sourcing model
- Vale onboarding and the limits of all inclusive sourcing — structural issues

**B9. Navigating the Landscape of Analytics Service Providers**

The changing nature of business analytics and information management markets are molding the landscape of consulting and implementation services. This session explores how offerings are expanding and provides insight into how to select the services best suited for different needs.

- How does Gartner define business analytics and information management?
- Which vendors are redefining the service provider landscape?
- What is the best approach to service provider selection?

Alex Soejarto

**B10. To the Point: Utility Network Services — New Ways to Source Your Enterprise Network**

From port rental pricing for managed LANs to per-user pricing for WANs, new network sourcing offers bring the prospect of cloud-like flexibility to the enterprise network. However, many offers are immature and all are very different from the way most enterprises source their networks today. This presentation examines how enterprises should respond to this challenge.

- What are the networking challenges?
- What are the new utility network service offerings?

William Maurer

**B11. Desktop as a Service Opportunities 2014-2019: Moving From Niche to Mainstream — Or Not**

Desktop as a service (DaaS) offerings are evolving, with many variations, challenging sourcing managers to understand the solution deliverables, determine the suitability and meet end-to-end service requirements. This session discusses the key trends in selecting DaaS and the critical success factors when using DaaS.

- What is DaaS and how is it perceived in the outsourcing marketplace?
- What are the best practices for determining if and when DaaS is best for you?
- What are the best service levels, pricing structures and contract mechanisms for DaaS?

Neil Rickard

**IT Vendor Managers: Optimizing Your IT Vendor Ecosystem**

**C1. Effective Vendor Management in a Cloudy World**

The keys to effective vendor management must change, as service providers adapt to cloud, mobile, social and information-centric delivery models. Vaguely constructed SLAs and immature operating models constitute
a new level of risk to the buyer and change the nature of the relationships and techniques that must be applied to manage vendors.

• How is the Nexus of Forces changing the nature and risk of service delivery?
• How do these changes impact vendor contract and relationship management?
• What new competencies are needed for effective vendor management?

Linda R. Cohen

C2. To the Point: Vendor Intelligence — Harvesting Big Data Opportunities in Vendor Management
This session identifies data analytics strategies to help attendees to advance their vendor management disciplines. The presentation explores techniques to find hidden gems within big data to crowdsource and “crowdscore” vendor intelligence. Learn how you can harness big data opportunities to glean critical vendor intelligence.

Gayla Sullivan

C3. The Vendor Management Playbook: Building the Foundation for IT Vendor Management
Starting a vendor management program from scratch can seem like a daunting task, but it doesn’t need to be. This session identifies the framework for creating, implementing, operating, and improving your vendor management program.

• What are the components of a vendor management program?
• How can organizations implement a vendor management discipline?

Linda R. Cohen

C4. Review Vendors’ Performances to Stop Them From Managing You
Many organizations develop performance metrics, but fail to implement a comprehensive performance management process. This presentation covers a 10-step vendor performance review process that can help sourcing and vendor management leaders improve outcomes with their vendors.

• How does a lack of vendor management resources impact service delivery and create stakeholder dissatisfaction?
• How can organizations understand which vendors are their best or worst performers?
• How can organizations reduce chaos by implementing a consistent approach to reviewing vendor performance?

Ruby Jivan

C5. To the Point: The Goldilocks Principle — How Many Vendors Is Just Right?
In today’s crowded and chaotic IT marketplace, it is all too easy for organizations to become overloaded with vendors. Many clients are struggling to tame the complexity of too many vendors by whittling down the portfolio. But how do you balance healthy competition with the necessary breadth of IT capabilities without adding too many vendors? And, what is the formula for striking the right balance between too few, too many and “just right?”

Linda R. Cohen

C6. Debate: Should You Insource or Outsource the Role of the MSI?
Organizations operating in a multisourced environment must include the role of a multisupplier integration. A key question is whether they should insource or outsource that capability. This session debates the merits of developing this competency internally versus outsourcing it to a third party.

• How do you determine your competency to insource the MSI role?
• What are the reasons to consider outsourcing the MSI role, and what are the expected benefits?
• What are the criteria for selecting an MSI, whether internally or externally sourced?

Jim Longwood, Gilbert Van der Heiden, Frank Ridder

C7. To the Point: Strategies for Managing Your Critical IT Service Providers
There is no way around the fact that business is now critically dependent on some IT service providers. This presentation discusses the best methods for optimizing the utilization of critical vendors without giving away the store, and answers the question, what methods can you employ to assure effective and objective critical IT vendor performance and relationship management?

Linda R. Cohen
C8. Case Study: Humana — Transforming Strategic Vendor Services to Enable Competitiveness
Humana’s Strategic Vendor Services (SVS) organization has had to adapt to constant changes in a very competitive environment to drive efficiencies, velocity, compliance, accountability and cost management, and to reinvent its core. This session describes the journey taken by Humana’s SVS, focusing on:
• The catalyst for Humana’s SVS transformation
• The approach taken
• The tactical and strategic considerations
• Humana’s SVS Digital Platform
• The unique outcomes and results
Anthony F. Porter, Director Strategic Vendor Services IT, Humana

C9. Avoid Common Pitfalls in System Integration and Development Project Contracts
Managing the delivery of an outsourced development or implementation project requires organizations to have strong project and vendor management skills. This session identifies common mistakes made while contracting and managing projects, and identifies best practices to mitigate project performance risks.
• What are the most common mistakes made when engaging a vendor in a development or implementation project?
• How can you reduce the risks in achieving successful project outcomes?

C10. To the Point: Best Practices in Scorecarding Vendors
Many organizations struggle to develop standard, objective and consistent scorecards to evaluate the performance of their IT vendors. This session provides insight and examples of the best approaches to scorecarding your IT vendors.
• What are the best metrics and tools for scorecarding IT vendors?
David Edward Ackerman

C11. Trigger Your Deal’s Success Through Effective SLA Development and Management
Developing and managing the right key performance indicators and performance metrics is instrumental to align an outsourcing contract to its objectives. This session provides the Gartner methodology for driving the right vendor behaviors in traditional and emerging service delivery models.
• What is the best process for developing KPIs and SLAs?
• How can you best report and communicate vendor performance against its SLAs?
• How to ensure that the contracted metrics are being met, and that the vendor is continuing to improve its service delivery?
Gianluca Tramacere

D1. Pricing Trends and Methodologies: What Are They and How Do They Impact My Deal?
This session reviews the latest pricing methods and ranges in today’s market. It also identifies how using the right models and understanding current market ranges will help in vendor selection or renegotiating deals.
• What are the most common pricing models used in outsourcing contracts and what are their key attributes?
• What pricing models are best suited for different contracted work, and for different deal types?
• What are the most current pricing ranges seen in the marketplace, and how will they help you to achieve your deal goals?
William Maurer

D2. To the Point: Planning Your SaaS Implementations — The Differences Between SaaS Deployments vs. Conventional On-Premises Implementations
IT organizations struggle with how to plan, integrate and deploy SaaS applications, which require different approaches and resources than traditional on-premises application packages or custom applications. The involvement of business users, agile development processes, information integration and PaaS technologies all require different processes and skills.
• What are the similarities and differences of SaaS versus traditional application implementation efforts?
SESSION DESCRIPTIONS

- What are the implications for evaluating and managing SaaS implementation services providers?
  *Patrick J. Sullivan*

**D3. Charting Your Road Map to the Cloud**
As more organizations identify benefits from cloud computing, they increasingly ask how to assure a smooth transition and how to procure, implement, govern, manage and control these new services. This session explores the best practices and current experiences of a large number of organizations.

- How will organizations transition their current portfolios of solutions to the cloud?
- How will new capabilities impact the ongoing race to better, faster, cheaper?
- How will the role of IT, its leadership and its ecosystem of vendors and providers, need to change?
  *Gregor Petri*

**D4. Harnessing a Global Talent Pool Through Crowdsourcing — Risks, Rewards, Opportunities**
Organizations in a highly competitive world are looking to maximize innovation to achieve business goals. Crowdsourcing combines the power of global human capital with the power of the cloud and can be an exciting new way to gain innovative ideas and develop applications.

- How can crowdsourcing be used to meet business goals?
- How to harness the energy and innovation of global developers?

**D5. To the Point: Can Outsourcers Really Manage a Hybrid IT Environment?**
Outsourcing providers recognize that your future computing requirements will be delivered across multiple implementation scenarios, and often from multiple clouds. This notion of managing hybrid IT will be a key success factor for outsourcing providers over the next three years. How are leading outsourcing providers approaching this new requirement? Which providers have the most complete solutions and vision to help you today?
  *Bryan Britz*

**D6. The Future of Data Center Managed Services**
“Steady state” management is a myth. Infrastructure constantly evolves, and so does its management. Contracting based on the IT effort required to manage a steady-state environment (the “what”) rather than the intended outcome (the “why”) is outdated. Reinventing rigid service delivery models and cost-focused value propositions should be top strategic initiatives.

- What are the key trends reshaping the global data center services market?
- How can rigid and cost-focused delivery models evolve to deliver more value?
  *Eric Goodness*

- What are the risks and rewards when using crowdsourcing?
  *Helen Huntley*

**D7. To the Point: Enterprise Mobility — How Do You Compare With Your Peers?**
In April 2013, Gartner fielded a survey to 400 decision makers to gain insights on investment plans regarding the adoption of enterprise mobile B2E/B2C solutions. This session highlights key findings, including which mobile solutions leading vs. mainstream enterprises invest in.
  *Susan Tan*

**D8. Case Study**
**D9. Managed Mobility: How to Use Outsourcing to Become a Mobile Enterprise**
The “mobile enterprise” is an aspirational state for all but a few. Most companies simply throw mobile devices and applications at employees and processes in hopes of success and transformation. This session identifies which support to outsource to external providers, independent of mobility asset strategies and schema — and how.

- How can contracting benefit from changing the focus away from steady-state management to workload portability?
  *Bryan Britz*

- How can external service providers support diverse mobile asset and applications strategies?
- What are the support models, commercial terms and pricing?
- Which providers in the competitive landscape are best?
  *Eric Goodness*
D10. To the Point: Maximizing the Value of Cloud Services Through Cloud Services Brokerage
The growing adoption of cloud services creates a new challenge of aggregating, integrating and customizing cloud-based solutions. This session highlights cloud service brokerage models and the role both providers and internal IT organizations will play in delivering complete cloud solutions.
• What are the different roles of cloud services brokerage?
• How is cloud services brokerage impacting cloud services implementation and delivery?
• How will hybrid IT scenarios change the roles of vendors and internal IT in delivering cloud services to organizations?

Ed Anderson
B F

D11. Cloud Services: When Done Right, Business Benefits Soar
What if adopting cloud service models helped your organization do more than just save money? When done right, cloud services can drive real benefits for your business, including increased agility and competitiveness.
• Why do organizations adopt cloud computing today?
• What are the best criteria for determining when and when not to use cloud services?
• How can organizations maximize the real business benefits of cloud services?

Ed Anderson
A A

AUR3. Driving Value From Your Oracle Services Provider
Implementing and managing Oracle products is increasingly difficult. There are many process and integration issues to resolve. And Oracle is not making it easier. This session focuses on the services partner ecosystem and how to drive the most value out of those professional services firms to maximize Oracle investments.

Alex Soejarto
F F

AUR4. Impact of U.S. Visa Legislation on India Offshore Outsourcing
Enterprises that utilize offshore must understand a bill now under debate in the U.S. Congress. The legislation may have a profound effect on the business model utilized in offshore outsourcing particularly for the India-centric providers. This roundtable discusses the proposed legislation, as well as its intended and unintended consequences.

Frances Karamouzis, Sandra Notardonato
A

AUR5. Cloud Migration or Cloud Migraine: A Self-Help Group for the Brave and the Wise
As cloud computing becomes the new normal, organizations look increasingly to their existing applications to reap the benefits of cloud computing. This workshop explores some of the paths to take to achieve this. We discuss options such as rehosting existing workloads on IaaS, redeveloping or redeploying applications on PaaS and/or replacing it altogether with new SaaS solutions. Whether you are a pioneer of the new or a guardian of the proven, join this interactive session...
to network with a small group of your peers to discuss challenges and share best practices.

Gregor Petri

AUR6. Cost Optimization Techniques When Outsourcing
All forms of externalization or outsourcing offer strategic and tactical benefits. One of the core benefits of outsourcing is the promise of lower per-unit costs and lower spending on IT in general. This roundtable session covers optimization perspectives from many different roles within IT and the enterprise.

Kurt Potter

AUR7. The Impact of Mergers and Acquisitions on Outsourcing
The impact of mergers and acquisitions (M&A) on outsourcing and services relationships is huge. The opposite is also true, and your vendors are restructuring as well. Attendees that have experienced or are facing challenges associated with their own M&A or those among their vendors are welcome to discuss best practices and practical hints.

Claudio Da Rold

AUR8. Which Cloud Models Are Best-Suited for Your Organization?
Organizations adopting cloud services must make trade-offs between private, public and hybrid cloud models. This roundtable discusses the pros and cons of the different models and the challenges of working with multiple models.

Ed Anderson

AUR9. Network Sourcing and Contracting Best Practices
Enterprises spend around 20% of their IT budget on networking and telecoms, and enterprise networking is growing to support new applications such as video and cloud services. This session enables those responsible for sourcing network services for their organizations to optimize their sourcing approaches and achieve the best possible contract terms.

Neil Rickard

AUR10. The Business Value of Testing Services
Testing services are growing and are more often acquired separately. For years testing was perceived only as time consuming and intrusive for the business, but the impact of the Nexus of Forces is lifting testing to the level of business assurance, and even moves it into the realm of sourcing management. Learn how testing will make life easier!

Gilbert van der Heiden

AUR11. SaaS Vendor Selections and Governance Best Practices
Salesforce.com, Workday and SuccessFactors are all growing portions of the application services portfolio. All these SaaS vendors and others shift application outsourcing from traditional service providers to SaaS vendors. Here we discuss best practices for selecting and governing SaaS vendors.

Frances Karamouzis

AUR12. Top 5 Things to Know When Contracting for Microsoft Cloud Offerings
When it comes to cloud, Microsoft is “all in.” From Azure and Office 365 to Windows Intune and Dynamics, Microsoft is trying to shift rapidly to a cloud service provider. But because of the sheer number of cloud choices and nuanced licensing rules, sourcing and contract managers struggle to find effective ways to negotiate and contract with Microsoft for cloud services. This session focuses on five things you need to know for a good Microsoft cloud service contract.

Frances O’Brien

AUR13. Cloud Migration or Cloud Migraine: A Self-Help Group for the Brave and the Wise
As cloud computing becomes the new normal, organizations are increasingly looking to also have their existing applications reap the benefits of cloud computing. This workshop explores some of the routes there. We discuss options such as rehosting existing workloads on IaaS, redeveloping or redeploying applications on PaaS and/or replacing it all together with new SaaS solutions. Whether you are a pioneer of the new or a guardian of the proven, join this interactive session to network with a small group of your peers to discuss challenges and share best practices.

Gregor Petri

AUR14. Using Key Performance Indicators as Measures in Outsourcing
This roundtable session introduces Gartner’s soon-to-be published listing of KPIs by industry. It also provides an opportunity to continue the theme of business outcome measures using “real” business measures or KPIs by industry.

William Maurer
AUR15. How to Fix a Really Bad Outsourcing Relationship
All outsourcing engagements go through growing pains and performance issues. Sometimes the issues drag for long enough such that the relationship is impacted, and both sides must make an effort to bring their relationship to a point of sufficient trust. This session allows participants to share their experiences and learn from each other what works and how to ensure the relationship does not deteriorate to the point where separation is inevitable.

Ruby Jivan

W2. Leveraging Cloud Assessment as Part of Your Sourcing Strategy
As sourcing models and cloud solutions mature, there are opportunities to leverage the Nexus of Forces to improve service delivery models and meet needs for agility and cost-effectiveness. This session explores the cloud assessment framework in relation to the development and refreshment of sourcing strategies.

Steven Buckley, Ed Anderson

AUR16. Measuring the Value of Vendor Management
Many vendor management organizations struggle to define the right metrics to prove the value of vendor management. This session allows participants to share their best practices and learn common and unique methods for measuring, communicating and proving the value of implementing and operating the discipline of vendor management.

Christopher Ambrose

W3. How to Pick the Right Data Center Outsourcing or Cloud IaaS Provider
Price points for industrialized data center services can be 50% lower than current internal costs, challenging the current strategies of many organizations. The 3D data center services market map provides a visual representation of the market’s price dynamics to help sourcing executives in evaluating potential savings and developing their sourcing strategy.

Claudio Da Rold

W4. Assessing the Health of your Outsourcing Deal
This workshop addresses the most critical issues faced in outsourcing relationships. It provides a framework for determining the underlying causes of difficulties and offers recommendations for getting a deal back on track. The session is designed as a workshop so that the attendees can learn from each other as well as from the expertise and experience of the Gartner team.

Chris Campbell, Frank Ridder

Practical Outsourcing: Workshops and Clinics

Please note that workshops are available to end-user organizations only and preregistration is required.

W1. Use Business Value Measures to Link IT to Business Performance
Sourcing executives often fail to optimize their outsourcing deals, because they do not link IT to business performance. This session identifies how business value can be measured, and takes attendees through the steps that are necessary to develop effective business value KPIs.

William Maurer, Gianluca Tramacere

W5. Contract Negotiation Clinic: Business Process Outsourcing
This session provides best practices for business process outsourcing contract negotiations, including the contract construct to use, the negotiation tactics and the team members that should be involved.

- What actions need to be taken before developing a contract or negotiating with your outsourcing vendors?
- What are the best practices for contracting for outsourcing business process services?
- How can the organization build the right governance model into the contract?

Cathy Tornbohm

W6. Application Portfolio Analysis for IT Sourcing Strategy Formulation
This workshop helps attendees to formulate a strategy for their future application services portfolio. Many organizations have hundreds of applications that require maintenance and management. Cloud, social, mobile and analytics are straining the existing application portfolio. Staff augmentation, various outsourced deals, SaaS solutions and in-house staffing all support your current application services portfolio. Using Gartner’s framework for conducting an application portfolio analysis, attendees discuss how to modernize
and advance application services sourcing strategies.
Frances Karamouzis

W7. SaaS Contract Negotiation Clinic
Designed for CIOs and senior leaders, this practical, interactive workshop explains how clients can effectively negotiate software as a service contracts. We explore trends in SaaS contracting, hidden costs and opportunities/risks within SaaS agreements.
Alexa Bona

W8. Use Business Value Metrics to Link IT to Business Performance
Sourcing executives often fail to optimize their outsourcing deals, because they do not link IT to business performance. This session identifies how business value can be measured, and takes attendees through the steps that are necessary to develop effective business value KPIs.
David Edward Ackerman, Gianluca Tramacere

W9. Move From Staff Augmentation to Managed Services
The session discusses how organizations that are in a staff augmentation model can move to a managed-service model. What contract, SLA, change management and sourcing management changes need to be made?
Ruby Jivan

W10. Move Your Vendor Management Up the Maturity Curve
Maturing your vendor management program begins with understanding your current level and mapping out a plan for achieving your desired state. This session provides an interactive setting in which you can develop a road map for maturing your vendor management program.
Christopher Ambrose, Gayla Sullivan

Magic Quadrant Sessions

MQ1. Data Center Magic Quadrant
William Maurer
MQ2. SAP Implementation Magic Quadrant
Susan Tan
MQ3. Oracle Implementation Magic Quadrant
Alex Soejarto
MQ4. End-User Services Magic Quadrant
David Edward Ackerman

Tutorials (Sunday, September 22)

Despite several generations of outsourcing deals, avoidable mistakes continue to be made by buyers of IT services. Many other organizations are outsourcing for the first time. These preconference tutorial sessions, held Sunday, September 22, will help you to establish clear principles and strong foundations for sourcing success.

Vendor management must be a disciplined process, and it starts with identifying the vendor management mission/charter, defining organizational models, determining roles and responsibilities, and developing key processes throughout the enterprise to effectively manage your suppliers.
- How can vendor management improve vendor performance?
- What are the best organizational approaches for vendor management?
- What are the primary disciplines, roles and responsibilities for vendor management?
Helen Huntley

T2. Application Outsourcing Tutorial: 10 Things You Need to Know
Application outsourcing continues to be a strong area of focus for sourcing, but how do you begin? What are the important considerations when thinking about application outsourcing? What are the key market forces and trends? In this tutorial, we uncover the top 10 things you need to know when contemplating and contracting for application outsourcing.
Gilbert Van der Heiden

T3. Gartner’s Best-Practice Contract Structure: When to Use Which Articles and Attachments for Deal Success
Gartner’s best-practice contract structure contains 19 master service agreements (MSAs) and 15 attachments. How do you know...
which ones are pertinent to your deal? This tutorial supplies insight on best-practice contract terms and conditions and why they are important for deal effectiveness.

William Maurer

T4. Offshore Tutorial: Getting Your Offshore Services Approach Right

The use of offshore outsourcing can provide tangible benefits, such as a labor arbitrage advantage, but it can also be a risky proposition. In this tutorial, we present the top 10 things you need to know when contemplating and contracting for offshore outsourcing.

Ian Marriott

T5. Business Process Outsourcing (BPO) Tutorial: 10 Things You Need to Know

There are over 50 different types of BPO that your organization might choose to evaluate or engage with. Here we briefly review the range of BPO options and, through the use of case studies, examine the market experience of BPO over the last 10 years.

Morgan Yeates

T6. Infrastructure Outsourcing Tutorial: 10 Things You Need to Know

Infrastructure outsourcing increasingly occupies the minds of CIOs and CFOs, as the options for utility infrastructure services and cloud delivery with infrastructure as a service become more mainstream. What do you need to consider with all the new options? What market forces and trends should you be aware of? This tutorial uncovers the top 10 things you need to know when contemplating and contracting for infrastructure outsourcing.

David Edward Ackerman

T7. Understand Outsourcing Pricing Models: Traditional and Cloud Services

In traditional professional services deals, we have learned to use a range of pricing models to provide visibility of the potential value delivered and drive the right service delivery behaviors by providers. This presentation examines nine pricing models and highlights where they can be applied.

• What are the common pricing models used for traditional IT services contracts?
• What pricing models are best suited for “managed” versus “as a service” versus “project” services?
• What “levers” do you have to optimize the total cost of each service offering?

Jim Longwood


When an organization does not have a discipline to tie business needs to sourcing strategy, the sourcing strategy and actions will be ineffective, misaligned and potentially disruptive to business operations. Learn how to apply Gartner’s sourcing decision framework to give your organization predictability in decision making.

• Why is it imperative to build a disciplined process for sourcing decision making?
• What process should be utilized to make business-aligned decisions?

Linda R. Cohen, Allie Young

T9. Four Key Risks in Developing and Executing a Cloud Strategy

Migration to cloud-based services promises to offer organizations cost-effective, flexible and scalable information technology solutions to their evolving business needs. There are, however, significant risks related to cloud-based services that you must address. Identifying and mitigating these risks is critical to successfully execute any cloud strategy, and this requires a well-defined strategy and execution plan. This discussion presents Gartner’s views on the risks and mitigation benefits of executing cloud services.

Edward Wilson-Smythe
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