

Focus. Connect. Lead.

Conference Summary Report: Industries

The theme of this year's Gartner Symposium/ITxpo was **Focus. Connect. Lead.** A nexus of four disruptive technologies — social, mobile, cloud and information — is revolutionizing business, changing the enterprise ecosystem and placing greater demands on decision makers to drive value and deliver positive business outcomes. More than ever, IT leaders must acquire a new ability to **focus** on the issues that matter, **connect** people and ideas and **lead** with creativity and confidence.



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This summary report takes a high-level view of the strategies and tactics that can help attendees of the Industries track address how the nexus forces are impacting their specific industries. Ten sectors were covered in separate tracks that delivered targeted content and industry-specific perspectives for the following: Banking & Investment, Education, Energy & Utilities, Government, Healthcare Payers, Healthcare Providers, Insurance, Manufacturing, Media and Retail. We've highlighted critical take-aways and hot topics relevant to each of these industries.



Annemarie Earley
Managing Vice President

**Role-based conference
summary reports
coming soon!**

In addition to these Industries track highlights, we've created a **Gartner Symposium/ITxpo 2012 conference overview**, plus specific IT role-based and industry-focused summary reports that will be posted on gartner.com/us/symposium shortly:

- Overview
- Applications
- Business Intelligence & Information Management
- Business Process Improvement
- CIO
- Enterprise Architecture
- Infrastructure & Operations:
Data Center, Server, Storage and IT Operations
- Infrastructure & Operations:
Mobile, Client Computing and Communications
- Program & Portfolio Management
- Security & Risk Management
- Sourcing & Vendor Relationships

Message from Industries Track Manager Annemarie Earley

Aligning IT-specific initiatives to the industry's business success is the focus of every IT professional. The challenge is how to illustrate IT's impact on the business goals — whether to the bottom line, quality, expense control or client satisfaction. Our 2012 industry-focused sessions aided CIOs and IT professionals by illustrating how to contribute the greatest impact to their business. New realities call for refocusing objectives and reshaping business and operational assumptions. Session attendees acquired the knowledge needed to focus, connect and lead the change.

Audience highlights



Key take-aways

BANKING & INVESTMENT

The future of money

Businesses must plan for a future that looks very different from today. The use, storage and accounting of traditional money will be substantially amplified by the introduction of multiple other forms of money, including new mediums of exchange (e.g., loyalty points and gaming tokens) and alternate payment instruments (e.g., digital wallets). Opportunities for new trading and accounting services for commercial customers will grow. For traditional banks to succeed in this new environment, adaption will be critical.

“I always leave Gartner Symposium/ITxpo smarter than I was when I arrived. I feel like I get a window into the future here.”

T. Davis-Muffett, Director,
Public Sector, NetApp

Key take-aways

The role of digital megafirms

Headlines and hype suggest that digital megafirms such as Facebook, Google, Amazon and Apple are likely to become the “banks of the future.” These companies will have a significant impact on the financial services market, but they will not be the banks of the future. Although they have strong capabilities — from being masters of data management and analytics to more effectively integrating the nexus of forces than traditional banks — their ability to deliver a robust and sustainable banking proposition is fraught with difficulties. Among the challenges they face: security, scalability, performance and regulatory compliance.

EDUCATION

Analog vs. digital

A key question for many CIOs in higher education is whether they are analog or digital leaders. Analog leaders apply IT to create online versions of current institutional business models. Digital leaders create new value and funding using digital technology to build new digital institutional business models that transform value, funding and performance.

Recommendations for delivering on your institutional mission

How to strategize when your competition goes from analog to digital

- Acquire a language for change that enables you to communicate the value of IT
- Visualize the impact of digitalization and disruptive innovation on the education ecosystem in general, and your institutional business model in particular

How to govern with more choices, more often

- Develop high-pace decision making
- Be transparent with your service portfolio and service catalog

How to execute when commitments tie down resources

- Build a sourcing strategy based on leveraging your service catalog and the exostructure

Missed a session or want to see those “aha” moments again?



All full-conference attendees receive free online streaming of available sessions from the event for one year! High-quality recordings feature synchronized video, audio and slides.

Visit gartnereventsondemand.com for more information.



Key take-aways

ENERGY & UTILITIES

Top 10 business and technology trends impacting the energy and utilities industry

Business trends

1. Rising energy prices
2. Renewable sources
3. Environmental concerns
4. Financial crisis fallout
5. Security
6. Merger acquisitions and divestments
7. Aging assets
8. Reliability
9. The smart grid
10. Energy technology consumerization

Technology trends

1. Communication technology
2. Mobile and location-aware technology
3. Big data
4. Social media and Web 2.0
5. Electric vehicles
6. Energy storage
7. Advanced metering infrastructure
8. SaaS and cloud computing
9. IT and OT convergence
10. Demand response

“The best part of the Gartner experience is meeting with peers and hearing the challenges and successes that exist across various industries.”

M. Thompson, CTO, VA529



Key take-aways

GOVERNMENT

Five trends influencing the use of IT in government

Seamless socialization. The distinction between internal and external collaboration is blurring, and the workplace will provide tools that allow the seamless sharing of information across multiple networks. Dynamic collaboration spaces will be created that cross role and jurisdictional boundaries.

Commoditization. The emergence of cloud computing to address infrastructure and application needs, and the pressure coming from the workforce to introduce consumer technology, show that an increasing portion of government IT is not “special” and can rely on highly commoditized technologies.

Information continuum. Decision-making processes will have to rely more and more on the ability to take in and analyze information that is both inside and outside the boundaries of government.

Interoperation of IT and operational and consumer technologies. The emergence of the Internet of Things — where all devices, objects and people are addressable on the Internet — will create multiple opportunities for a new wave of constituent engagement and the redesign of government processes and services.

Employee-centricity. New opportunities to create public value will emerge by enabling employees to innovate the way they work, leading to an evolution of the workplace and its tools, supporting mobility, more flexible working times and places, real-time access to internal and external information, advanced analysis and seamless collaboration.

HEALTHCARE PAYERS

Recommendations when adapting to new business models

- Use transactional data to provide the indicators of operational direction, rather than as absolute measures of enterprise success.
- Redefine the healthcare payer business model as a relationship-oriented approach that shifts the focus from group buyers of insurance to individual consumer purchasers.
- Recognize that bolting on transformational IT capabilities, such as mobile applications or cloud computing, will not substitute for the fundamental changes needed to transform the business.
- Look at domains as a guide for evolving transformation.



“This conference has been helpful on many levels, from the networking to product selection to strategic planning.”

R. Ficoturo, ITPS Engagement Manager, Wawa

Key take-aways

HEALTHCARE PROVIDERS

Dealing with IT priorities in an accountable-care world

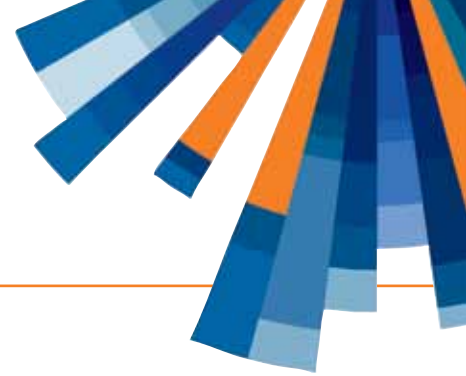
There are major changes occurring in the healthcare delivery systems services and business models. To address them effectively we recommend that in 2013 you:

- Spend 60% of your time on revenue-enhancement strategies.
- Investigate IT innovations in consumer marketing: Collaborate with marketing and ACO leads on CRM plans.
- Initiate specific efforts to strengthen the IT governance process around value and risk.
- Ensure that IT, clinical and information steering committee representation is reweighted to reflect the shift to ACO/VBP and other growth areas of the business.
- Expand personal relationships to be an insider in the new politics of the large, integrating delivery system.
- Develop plans to re-skill key IT resources toward deeper business-critical process expertise.

INSURANCE

P&C and life insurers will face a different market during the next 10 years

- Consumers will make the rules. Customers will increasingly use the Internet to research and buy insurance, including social media sites and search engines — all of which are more customer-centric.
- Companies will need to more effectively leverage information and move to digitalization for enhanced operational efficiency, agility, customer satisfaction and competitive advantage. The scenario: Many large insurers will find it difficult to reduce operating expenses to compete against new competition, and find internal politics difficult to drive new business approaches.



Key take-aways

Critical success factors for P&C and life insurance

It's essential that insurers transform their business operations in the next 10 years to match the shifting industry needs for customer-centricity and digitalization. Companies should assess where they are on each of these 11 critical factors necessary for market success:

- Single view of customer and customer intelligence
- Customer-centric processes/channels
- Brand relevance
- MCI
- Product innovation/niche products
- Electronic business processes
- Process agility
- Social strategies and execution
- Mobile enablement
- Digital agent operations
- Big data and analytics



MANUFACTURING

Leveraging digital marketing for growth

In consumer goods manufacturing, one of the leading sectors of manufacturing, 90% of companies see digital marketing as critical to compete. But digital marketing is becoming an increasing part of marketing activities for manufacturers of all types. Here are recommendations to leverage it for growth:

- Work with your business partners to make the connections between business strategy, marketing strategy, digital marketing and technology.
- Have marketing work with finance and IT to align and integrate its marketing measurement strategy with the company's corporate performance management strategy.
- Assess how your company is allocating funding for digital marketing.
- Evaluate you mix of digital marketing tactics across these four areas: addressable advertising, social marketing, contextual marketing and transactional marketing
- Determine the need for a digital marketing competency center.
- Discuss with marketing where they see long-term growth opportunities for their customers, and how technology can enable that growth.

“The [nexus] forces challenge us to think about shadow IT and how to engage those stakeholders, as well as embrace these technologies within the enterprise in a safe and scalable fashion.”

C. Steinberg, CIO, Nassau
BOCES

Key take-aways

MEDIA

Influence engineering

Over the next decade, big data, marketing, psychology and analytics will come together in a new area termed “influence engineering.” Algorithms will be used to find and utilize “influencers,” those who will help lead marketers to friends and networks interested in buying products and promoting causes.

- The science of psychology will be used to link data architects and marketers.
- Patterns of influence will be spotted and used for context-aware experience.
- IT will automate, measure and optimize these influence “pitches.”

Digital marketing

Digital marketing is not a strategy; it's a set of tactics, enabled by technology, that allows marketing to engage in a dynamic conversation with people who are influencers and buyers, and to target, customers. The digital CMO should be responsible for mastering technology and digital techniques to improve their marketing processes, and achieve the basic goal of acquiring and retaining customers. CIOs and the IT organization should partner with them to build the right skills, competencies and measurements.

RETAIL

Mobile in multichannel

Despite the hype around mobile commerce, this channel will account for a low percentage of overall retail revenue for the near term. However, mobile shopping will drive significant levels of revenue in the e-commerce channel.

The role of the store

The importance of the store as the execution hub of multichannel retailing will call for increased technology spending in stores. Store location and multichannel market analysis will become increasingly important.

Context-aware offers

By 2015, context-aware promotions will comprise 10% of promotional activity among consumer goods manufacturers in developed markets.



Mark your calendar

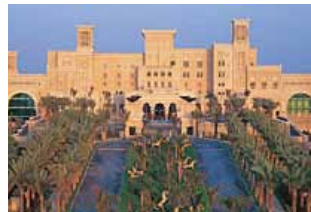
Register now and lock in at 2012 rates — registration rates increase beginning January 1, 2013.

Help shape Gartner Symposium/ITxpo 2013

Planning for Symposium/ITxpo 2013 is already under way, and your input is critical. If there is something you'd like to share with us regarding any aspect of the event — an idea or suggestion that may have occurred to you since you completed your evaluation form — please email symposium@eventgartner.com.

Thank you for your feedback, and we look forward to seeing you again next year at a global Gartner Symposium/ITxpo 2013 event:

gartner.com/symposium



Dubai, UAE
March 5 – 7
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Cape Town, South Africa
September 16 – 18



Orlando, Florida
October 6 – 10
Takes place two weeks earlier next year!



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October 16 – 18



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October 21 – 23



Gold Coast, Australia
October 28 – 31



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Register by January 18, 2013*

March 17 – 19, 2013

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The Digital Enterprise and Beyond

Information and technology are at the forefront of changing business demands, requiring CIOs to evolve how they lead IT. Gartner CIO Leadership Forum 2013 focuses on the future digital leadership requirements by covering what CIOs need to:

Do new: Create value using new technologies

Undo: End obsolete practices, organizational structures, roles and legacy limitations

Redo: Refresh management approaches to drive excellence in information and technology

Not do: Follow the pack, continue to make best-practice mistakes, attend to false signals and surf dead-end trends

Due to the exclusivity of this event, attendees must be preapproved to register.

Visit gartner.com/us/cio for more information.

*Register now and lock in 2012 rates — registration rates increase beginning January 1, 2013.

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