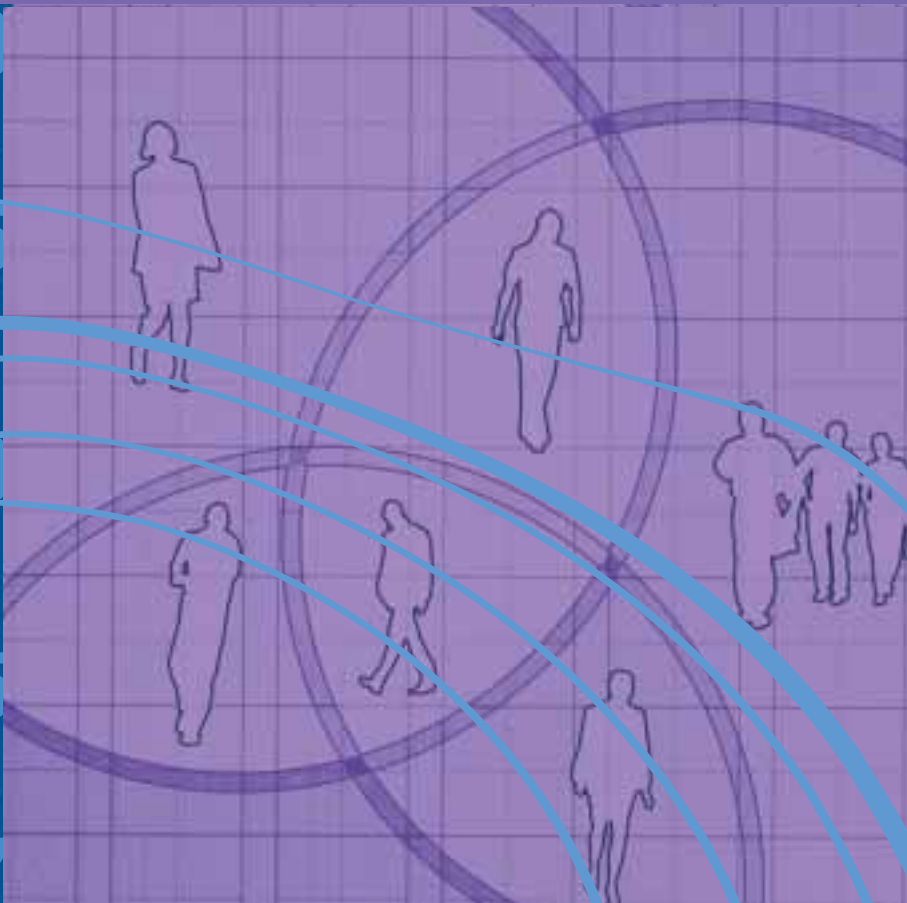


To see where you're going, you have to know where you've been. See timeline inside

It's time for
the new age
of CRM.

90
95
00
05
2007



SEPTEMBER 17-19 THE WESTIN DIPLOMAT HOLLYWOOD, FLORIDA gartner.com/us/crm
Pre-Summit Workshop and Tutorials, September 16

KEYNOTE SPEAKERS



Paul Greenberg
Author, *CRM at the Speed of Light*, and
Chief Customer Officer,
BPT Partners



Martha Rogers
Ph.D., and Founding
Partner of Peppers &
Rogers Group



Dan Heath
Best-selling Author, and
Consultant, Duke
Corporate Education



Joe Wheeler
Executive Director, The
Service Profit Chain
Organization

The new age of CRM has arrived. Are you ready?

Over the years, CRM has had its highs and its lows, its successes and failures. Organizations have embraced it, and renounced it. Loved it, and hated it – a business discipline so powerful in its potential that it couldn't be ignored.

The new age of CRM is here. Now, it's not just about technology. It's more than a means to efficiency. It's a holistic blend of vision, strategy, culture and analysis. It's a focus on customer-centricity and the long-term business value of your customer relationships. Those who can master it have everything to gain – and those who can't, will almost certainly fail. Ready to write your own success story in the new age of CRM? Join us in Florida this September for the Gartner Customer Relationship Management Summit.

1990s: CRM is all about technology and short-term efficiency.

Many organizations implemented CRM to achieve greater business results — but lacked a focus on business strategy and processes. Most simply automated what they were already doing, resulting in efficiency gains simply by improving processes that were already in place.

1995: “Big Bang” CRM: Big spending without adequate ROI.

Massive CRM projects were executed across sales, customer service and marketing — but without clearly phased road maps and plans. Bottom line? Lots of spending on never-ending projects that rarely had a business case and produced few if any measurable results.

90

95

00

05

07

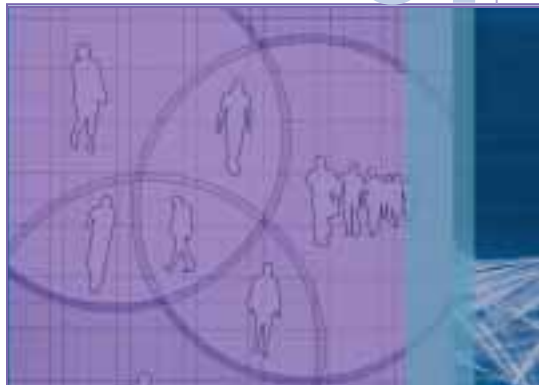


2000: CRM Backlash: CRM fails to deliver the desired results.

Many organizations abandoned CRM projects and took their IT investments elsewhere. CRM acquired a negative reputation, and jobs were lost over what many believed were CRM “failures”. How bad did it get? Many companies avoided using the taboo term “CRM” altogether.

2005: Siloed projects deliver tactical value but long-term value remains elusive.

CRM returns, with more focus on smaller tactical projects with clear business cases and short implementation timeframes. Projects were often confined within business functions such as sales, customer service, or marketing and implementation tied to a specific application area.



YOU ARE HERE:

2007 and beyond: The New Age of CRM emerges as a journey, not a destination.

Large CRM initiatives return, this time with a phased approach — and driven by highly-defined vision and strategy. Processes are reengineered and documented prior to implementation, and there is a new focus on sponsorship, change management and measurable objectives.

Our CRM Building Blocks are the foundation for the new age of CRM.

Who needs to be here?

Everyone. The new age of CRM requires both IT and business professionals to be fully committed to creating and maintaining a “customer-centric” organization. They include:

CRM Directors or SVPs of CRM; CMOs (Chief Marketing Officers) and Marketing Directors; CEOs; Line Business Executives; Managers and Direct Reports; Customer Service and Support Executives and Direct Reports; VPs of Sales and Marketing and Direct Reports; CIOs, Technology Strategists and IT Managers; Business Analysts and Consultants; Enterprise and Solution Architects; VPs of E-Commerce; Strategic Planners and Operations Officers; Project Managers

What’s in it for you?

A lot. In just three days, you’ll learn to:

- Develop a clear CRM vision and strategy
- Fully understand the customer experience
- Re-engineer processes and support collaboration
- Manage data and accurately analyze behavior
- Determine and apply appropriate metrics
- Select the best technologies, solutions, service providers and deployment models

Who gives you more in a CRM event? You decide.

At Gartner, we make it our business to offer deeper, richer content than you’ll find at any other CRM event. After all, our dedicated on-site team of 20+ CRM analysts is the largest and most experienced in the world. But we don’t stop there. Thousands of professionals choose the Gartner CRM Summit every year for the kind of valuable extras that set a Gartner event apart from all the rest.

GARTNER	COMPETITIVE EVENTS
Gartner Analyst One-on-One	No
Gartner Analyst User Roundtables	No
Biz & Tech Team Up Discounts	No
CRM Excellence Award Program	No
Co-Located Event (Gartner Master Data Management Summit, September 19-21)	No
Unparalleled Peer-to-Peer Networking	No
Hype-free Vendor Showcase	No

1 Vision

How does the customer-centric enterprise look and feel to its customers and prospects?

2 Strategy

How do you target, acquire, develop and retain valuable customers to achieve corporate growth?

3 Processes

How do you identify and re-engineer the processes that touch the customer?

4 Collaboration

How do you ensure that individuals and teams work together to put the needs of the customer first?

5 Customer Experience

How do you ensure that the customer experience results in trust, satisfaction and long-term loyalty?

6 Information

How do you establish and maintain a flow of customer information and analysis that is available when and where you need it?

7 Technology

How do you select the applications and architectures that support key processes and other seamless process integration?

8 Metrics

How do you create a hierarchy of performance metrics that accurately monitor and measure your CRM success?

Keynote Guests

Martha Rogers, Ph.D.
Founding Partner of Peppers & Rogers Group



Named by *Incentive* magazine as one of the ten “best and brightest” thinkers in the industry, Dr. Rogers is the author of multiple top ten business books, including *The One to One Future*, *Enterprise One to One* and *One to One B2B*, which appeared on the New York Times bestseller list in 2001. As an adjunct professor at the Fuqua School of Business at Duke University, Dr. Rogers has helped to spearhead the coursework for both MBA and Executive Education programs, specializing in business growth through customer value. **As a Summit Keynote this September, she will present new quantitative research from Peppers & Rogers Group and Carlson Marketing that reveals what drives loyalty, engagement and relationship strength.**

Paul Greenberg

Author, “*CRM at the Speed of Light*,” and Chief Customer Officer, BPT Partners



The author of the best-selling *CRM at the Speed of Light: Essential Customer Strategies for the 21st Century*, Paul Greenberg is President of The 56 Group, LLC, an enterprise applications consulting services firm focused on CRM strategic services. He is also a founding partner of BPT Partners, LLC, a training venture that has quickly become the de facto certification authority for the CRM industry. Mr. Greenberg’s book has been translated into eight languages and has been called “the bible of the CRM industry”. Mr. Greenberg is also the co-chairman of Rutgers University’s CRM Research Center and the Executive Vice President of the CRM Association. **In September, he will be presenting a Paid Workshop and Power Breakfast that explore customer engagement and the power of social media conversations.**

Dan Heath

Best-selling Author, and Consultant, Duke Corporate Education



Dan Heath is a Director at Duke Corporate Education, the world’s #1 provider of custom executive education as ranked by BusinessWeek and the Financial Times. His roles include developing and designing curriculum, teaching, and working closely with clients such as Microsoft, Wal-Mart, BAE Systems, and Brown Brothers Harriman to ensure their business outcomes are met. Mr. Heath is a columnist for *Fast Company* magazine. His column, called “Made to Stick,” explores how and why ideas succeed or fail. Before joining Duke CE, Mr. Heath earned a fellowship at Harvard Business School, where he conducted field research and developed cases for several professors in the Entrepreneurial Management unit.

Through a variety of success stories Mr. Heath’s CRM Summit keynote will reveal principles of successful ideas at work—and how these rules can be applied to ensure that our own messages “stick.”

Luc Bondar

Senior Advisor, 1to1 Faculty, Vice President Loyalty Marketing, Peppers & Rogers Group



Closely affiliated with the loyalty line of business for the past seven years, Mr. Bondar recently rejoined the Australian office, which, under his direction, has proven to be a “hot house” for successful consumer loyalty concepts and innovation. He has been responsible for the sale, strategy and implementation of a wide range of loyalty and customer relationship programs for such clients as American Express, Amtrak, Minolta, Motorola, Toyota and Visa. Mr. Bondar holds a Postgraduate Diploma in General Management from the Macquarie Graduate School of Management, Australia’s leading business school. **In September, he will be co-presenting new customer loyalty research with colleague Martha Rogers.**

Joe Wheeler

Executive Director, The Service Profit Chain Institute



Co-author of *Managing the Customer Experience – Turning Customers into Advocates*, Mr. Wheeler is a consultant to some of the world’s leading companies. He is currently working on a new book entitled *The Science of Delight – Putting the Service Profit Chain to Work for Sustainable Competitive Advantage* with Professors James Heskett and W. Earl Sasser Jr. of the Harvard Business School. The book will report on the best practices of companies that have implemented the Service Profit Chain, demonstrating the power of linking employees, customer and profits. **Mr. Wheeler’s CRM Summit presentation will focus on how CRM, operations and HR combine to enable the “active enterprise,” how to execute a dynamic service delivery system and much more.**

Analysts



Gene Alvarez,
Research VP,
Gartner

E-commerce (on premise & on demand), e-business, Internet-based web sales strategies and technology, E-commerce Web 2.0, virtual environments for consumer sales, channel & partner relationship management including partner portals with e-commerce, sales/product configurators



William Clark,
Research VP,
Gartner

Mobile applications, the effect of mobile on business processes and workforces, multi-channel and wireless application gateways, wireless local-area networks (WLANs), personal-area networking (Bluetooth), cellular phones, wireless networking and location technologies, and mobile software development and testing



Kimberly Collins,
Research VP,
Gartner

CRM Strategy, marketing resource management, enterprise marketing management, marketing analytics and performance management and lead management



Jim Davies,
Research Director,
Gartner

Emerging workforce optimization and customer service analytics markets, the European customer service and support market



Rob DeSisto,
Research VP,
Gartner

Application strategies, software as a service, sales force automation, pricing optimization and management applications



Jane Disbrow,
Research VP,
Gartner

Software license agreements, best practices for contract terms and conditions, negotiation strategy, license metrics and software audits, negotiating with Oracle and SAP



Michael Dunne,
Research VP,
Gartner

Sales operations, sales incentive compensation management, sales analytics, sales performance management, as well as sales effectiveness tools



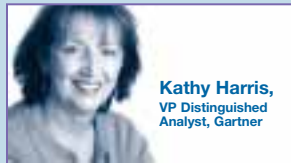
Bill Gassman,
Research VP,
Gartner

Web analytics, business intelligence, business activity monitoring



Matt Goldman,
Research VP,
Gartner

External service provider evaluation and selection, user wants and needs, market sizing, forecasting, and market trends for the CRM services marketplace, including consulting, system integration and business process outsourcing



Kathy Harris,
VP Distinguished
Analyst, Gartner

Applications strategy, knowledge and intellectual capital management, managing innovation, collaboration and business value of IT



Gareth Herschel,
Research Director,
Gartner

Customer behavior analysis, customer profitability analysis, data mining and predictive analytics; performance management & reporting, key performance indicators for CRM; real time best next action



Isher Kaila,
Research Director,
Gartner

CRM strategy and implementation, business case development, CRM staffing, Siebel, change management and CRM in Asia-Pacific



Esteban Kolsky,
Research Director,
Gartner

Enterprise feedback management, customer service models and e-service suites



Drew Kraus,
Research VP,
Gartner

Contact centers, unified communications, and various contact center and converged technologies



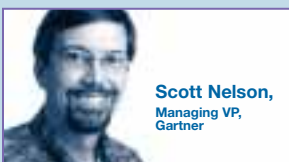
Michael Maoz,
VP Distinguished
Analyst, Gartner

Emerging customer service contact center applications, customer retention strategies, Software as a Service (SaaS) for CRM, field service technologies and processes. Research agenda manager for customer service and support strategies.



Sharon Mertz,
Research Director,
Gartner

Strategic consulting and management directed toward the introduction and impact of emerging technologies in the marketplace



Scott Nelson,
Managing VP,
Gartner

Application strategy and governance, CRM vision and strategy



John Radcliffe,
Research VP,
Gartner

Creating the "single view of the customer", customer data integration (CDI), master data management (MDM), evolution of CRM applications to SOA



Adam Sarner,
Principal Research
Analyst, Gartner

CRM, campaign management, e-marketing and e-commerce strategy and technology



Ed Thompson,
VP Distinguished
Analyst, Gartner

Customer experience management, harnessing IT for growth, CRM implementation, strategy, enterprise feedback management, SAP CRM and CRM in Europe

Agenda at a Glance

September 17-19 The Westin Diplomat Hollywood, FL

Sunday, September 16

2:30pm	Pre Registration				
3:00pm	Pre Conference Workshop: CRM, Social Media, New Business Models: How To, Why To, Web 2.0 Paul Greenburg, Chief Customer Officer, BPT Partners (additional fee \$495. Go to gartner.com/us/crm)				
	Track A: CRM Strategy	Track B: Marketing	Track C: Sales	Track D: Customer Service	Track E: CRM Technology
	Strategies and Implementation Best Practices for Successful CRM Projects	Transforming Marketing to Drive Profitable Customer Relationships	Exceeding Sales Targets With Selling Technologies	Customer Service and Contact Center Technologies	
2:45pm	Tutorials				
	T1. CRM Implementation: Project Management Best Practices		T2. Web Channel Analytics: Expectations and Best Practices		
4:00pm				T3. Enterprise Feedback Management Comes of Age	T4. Get A Great Deal When Buying Your CRM Software
5:15pm			T5. Sorting Through Your E-Commerce Options		T6. BI, BAM, BPM, CPM, A-CRM – Making Gumbo from Alphabet Soup

Monday, September 17

7:00am	Pre Registration				
7:30am	General Breakfast				
7:30am	T7. The Eight Building Blocks of CRM: The Essential Elements of Success	T8. Engaging External Providers to Improve Your Customer Experience: Who Can Help?	T9. Technologies That Can Be Used to Improve the Customer Experience		
8:30am	K1-A. General Session: CRM Scenario: Why the Future of CRM Will Look Very Different Than The Past Scott Nelson, Managing VP, Gartner				
9:15am	K1-B. CRM Excellence Award Nominees Presentation				
10:30am	A1. How to Create a CRM Vision and Strategy	B1. The CMO Challenge: Transforming Marketing to a Profit Center	C1. Maximizing Value From Sales Force Automation	D1. The Secret to Delivering Superior Customer Service in the Contact Center and Beyond	E1. CRM Architectures and Technology Platforms: Evolving Towards SOA. Are We There Yet?
11:45am	A2. 1000 CRM Projects Can't Be Wrong! Lessons From Those Who Have Gone Before	B2. Driving Customer Loyalty Through Highly Relevant Marketing	C2. Selling in Web 2.0 World	D2. Breaking Barriers Between the Contact Center and Business	E2. Knowledge Management and My CRM: How Can We Bring the Hype to Life?
12:45pm	Attendee Lunch & Sponsor Showcase Dessert Reception				
2:45pm	Solution Provider Sessions				
4:00pm	A3. Using Metrics to Build Strong, Profitable Customer Relationships	B3. Improving Marketing Operations and Resource Allocation With MRM	C3. Sales Performance Management: Foundation for Success	D3. Enterprise Feedback Management: Truly Knowing What Customers Want	E3. The Role of SaaS in the Future of CRM
5:15pm	K2. The Science of Delight – Putting the Service Profit Chain to Work for Sustainable Competitive Advantage Joe Wheeler, Executive Director, Service Profit Chain Organization				
6:15pm	Solution Showcase Reception				

Tuesday, September 18

7:15am	Pre Registration				
7:30am	General Breakfast				
7:30am	PB1: Power Breakfast: It's So 2.0 Out There: Customer Engagement and the Power of Social Media Conversations. Paul Greenburg, Chief Customer Officer, BPT Partners				
8:30am	K3. General Session: Made to Stick: Why Some Ideas Survive and Others Die Dan Heath, Best-selling Author and Consultant of Duke Corporate Education				
9:45am	A4. The Market for CRM	B4. Case Study Panel: Experience Counts: Customer Experience Management to Build Brand and Grow Profit (Moderated by Ginger Conlon, 1to1 Magazine Editor-in-Chief)	C4. Sales Analytics: Turning Insight into Opportunity	D4. Voice Self-Service: Better than Live Agent?	E4. CRM in Motion: Wireless for Sales, Field Service and B2C
11:00am	Solution Provider Sessions				
12:00pm	Attendee Lunch & Sponsor Showcase Dessert Reception				
2:00pm	Announce CRM Excellence Award Winner				
2:15pm	A5. Case Study	B5. Using Segmentation to Drive Customer-Centricity	C5. Case Study	D5. Case Study	E5. Using Consumer Technologies for CRM
3:30pm	Sponsored Session	Sponsored Session	Sponsored Session	Sponsored Session	Sponsored Session
4:15pm	Sponsored Session	Sponsored Session	Sponsored Session	Sponsored Session	Sponsored Session
5:00pm	A6. Effectively Using Change Management to Generate CRM Success	B6/C6. Aligning Marketing and Sales Through Improved Lead Management Processes		D6. How Analytics Changes the Future of Customer Service	E6. Creating and Leveraging the Single Customer View: How Can You Achieve Nirvana?
6:00pm	Sponsor Hospitality Suites				

Wednesday, September 19

7:00am	General Breakfast				
8:00am	A7. Improving the Customer Experience: Satisfaction, Loyalty and Branding	B7. E-Marketing Facilitates the Customer's Buying Process	C7. Best Kept Secret: Growing Margins With Price Optimization	D7. How to Manage Customer Service Across Channels and Functions	E7. Must-Have Advanced Analysis for Customer Insight
9:15am	A8. Using the Business Case to Increase the Success of Your CRM Project	B8. Improving Marketing Performance Through Analytics	C8. Increasing Close Rates With Sales Effectiveness Technologies	D8. Contact Center Performance Optimization: The Consolidated Suite	E8. CRM Vendor Landscape: How to Leverage Emerging Trends and Tackle Long-Term Uncertainties
10:30am	K4. Keynote Session: Not Just Loyalty, Engagement: Presenting the Latest Findings From a New Peppers & Rogers Group Research Study Martha Rogers, Ph.D., Founding Partner of Peppers & Rogers Group and Luc Bondar, VP of Loyalty, 1to1 Media				
11:35am	K5. Closing Keynote: Gartner Open Research Meeting Moderated by Michael Maoz, VP Distinguished Analyst, Gartner				

AS OF JUNE 18, 2007 AND SUBJECT TO CHANGE.

5 tracks designed to help you be a leader in the new age of CRM.

1

Track A: Strategies and Implementation Best Practices for Successful CRM Projects

In all cases, successful CRM projects require strong leadership, a clearly defined strategy with the right metrics, organizational change and improved customer-facing business processes, customer data and technology. Created for the needs of business executives, CRM strategists, managers, and program and project managers — as well as sales and marketing managers, CIO's and IS applications manager — this track will focus on the strategic and implementation aspects of CRM.

2

Track B: Transforming Marketing to Drive Profitable Customer Relationships

CMOs are under increasing pressure to improve accountability, reduce marketing costs and drive revenue growth — and deliver long-term, measurable performance. This track will look at the strategies, processes, analytics, best practices and processes that drive marketing innovation — and hot areas of investment such as segmentation, campaign management and lead management, as well as the emerging areas of community marketing, MRM and Enterprise Marketing Management.

3

Track C: Exceeding Sales Targets with Selling Technologies

For years, sales organizations failed to adequately improve sales productivity and effectiveness with technology. This track is devoted to assisting enterprises in applying technology to successfully increase revenue and margin growth. Through best practices, decision frameworks and case studies of successful deployments, we will reveal the secrets for implementing a compelling sales technology strategy that produces solid ROI for your organization.

4

Track D: Customer Service and Contact Center Technologies:

For many organizations, the contact center holds the key to CRM success. This track will focus on all aspects of this potential powerhouse: from the tools and processes agents need to do their jobs to the analytically-driven software that supervisors need to manage daily customer-agent interactions. We will also explore the trends and technologies that will redefine the role of the contact center and customer self-service over the next five years.

5

Track E: CRM Technologies

Although CRM is a business strategy rather than a set of technologies, technology does play a vital role in enabling most successful CRM strategies. This track covers the range of technologies that support CRM initiatives — from Customer Data Integration to advanced analytics and knowledge management. We will also address the implications of technologies for CRM success, and highlight how enterprises are using technology for competitive differentiation.

A comprehensive agenda that meets the needs of business and IT.

Business:

- Effectively Using Change Management to Generate CRM Success
- Enterprise Feedback Management Comes of Age
- Improving the Customer Experience: Satisfaction, Loyalty and Branding

IT:

- BI, BAM, BPM, CPM, A-CRM, Making Insight Gumbo from Alphabet Soup
- CRM Architectures and Technology Platforms: Evolving Towards SOA. Are We There Yet?
- Sale Analytics: Turning Insight Into Opportunity

Business/IT:

- 1000 CRM Projects Can't Be Wrong! Lessons from Those Who Have Gone Before
- Best Kept Secret: Growing Margins with Price Optimization
- Knowledge Management and MY CRM: How Can We Bring the Hype to Life?
- The CMO Challenge: Transforming Marketing to a Profit Center

See page 7 for a complete conference agenda.

Collaborate and Save with Biz/Tech Team Up

Good things happen when IT and business decision makers share the same vision and goals. Our Biz/Tech Team Up program was created to do just that — and even includes a private session with a Gartner analyst designed for alignment and collaboration. Sound good? It gets better: attend the Summit with an IT colleague *and* a business colleague and one comes free!

Call 1 800 778 1997

Session Descriptions

Pre-Conference Workshop*

CRM, Social Media, New Business Models: How To, Why To, Web 2.0

In this special 3-hour workshop, we'll answer these questions and many more:

- Which contemporary business models will increase customer collaboration and advocacy?
- Provide a picture of the cost of entry, the barriers to success and the ROI on a successful implementation.
- How do you best utilize the Web 2.0 tools that are already out there, including; blogs, podcasts, social tagging, social networking and user generated content.
- Give you a live Web 2.0 tour.

Paul Greenberg, Author: CRM at the Speed of Light, Chief Customer Officer, BPT Partners

*additional fee \$495

Pre-Event Tutorials

T1. CRM Implementation: Project Management Best Practices

This session will offer advice and guidance and answer questions on:

- How to effectively plan and execute an on-time, on-budget CRM initiative.
- How to establish realistic CRM program goals and expectations?
- What tools do you need for effective CRM planning?

Isher Kaila, Research Director, Gartner

T2. Web Channel Analytics: Expectations and Best Practices

This presentation explains different stages of Web channel performance maturity and provides tips on selecting the right tools to improve an organization's Web site. Key Issues:

- What should organizations expect from Web analytics tools?
- Which best practices are important to improve Web channel business performance?
- Which best practices are important to improve Web channel business performance?

Bill Gassman, Research VP, Gartner

T3. Enterprise Feedback Management Comes of Age

The surveys and feedback market is exploding, and many organizations have embraced it. Yet most of them have had to acknowledge that there is more to building a survey than writing a few questions. This session will answer these questions:

- How do world-class organizations implement feedback initiatives?

- What are the benefits of analyzing and mining EFM initiatives results?
- Esteban Kolsky, Research Director, Gartner**

T4. Get a Great Deal when Buying Your CRMs Software

If you're thinking about buying a CRM application, it's important to structure your procurement strategy well before the first contract is signed. Why? Key issues include:

- What are the basics in obtaining a good deal in your procurement?
- What contract issues need to be negotiated to provide the best terms and conditions for your CRM deal?

Jane Disbrow, Research VP, Gartner

T5. Sorting Through Your E-Commerce Options

There are over 100 million web sites today — each offering a potential solution for running your e-commerce site. Choosing the right solution and deployment option ultimately contributes to the overall success of your e-commerce sales objectives.

- What are the market trends that are impacting every e-commerce initiative?
- Who are the e-commerce technology providers?
- Which deployment option should you consider for your site?

Gene Alvarez, Research VP, Gartner

T6. BI, BAM, BPM, CPM, A-CRM — Making Insight Gumbo from Alphabet Soup

Analyzing customer data is important, but the diversity of tools involved can be confusing for enterprises seeking to ensure a logical and consistent approach. This session will explain the main categories of analytical tools and applications, as well as providing guidance about their appropriate use.

- What are the main categories of tools and applications enterprises use to analyze enterprise and customer data?
- How will the functionality and use of these tools and applications evolve to support CRM initiatives?
- How should enterprises prioritize their investments in these tools and applications?

Gareth Herschel, Research Director, Gartner

T7. The Eight Building Blocks of CRM: The Essential Elements of Success

This presentation will introduce the framework of The Eight Building Blocks of CRM, the renowned Gartner framework for estimating,

planning and promoting your CRM initiatives. Key issues include:

- How does a CRM strategy differ from a traditional marketing strategy?
- What changes are needed to gain benefits from organizational collaboration to deliver on the CRM strategy?
- How will enterprises redesign processes to be more customer centric?

Ed Thompson, VP Distinguished Analyst, Gartner

T8. Engaging External Providers To Improve Your Customer Experience: Who can help?

Creating the customer experience requires design, implementation and management skills that your organization may lack. A wide variety of external providers — from web designers to brand and change management specialists — can provide the necessary blend of industry and functional capabilities to help you succeed. Key issues include:

- What are the key steps to creating the customer experience?
- How can service providers help you improve your customer experience?

Matt Goldman, Research VP, Gartner

T9. Technologies That Can Be Used to Improve the Customer Experience

The customer experience contains both rational and irrational elements and can be influenced by all five senses. Fortunately, there is a broad range of technologies that can be used to help both improve and better understand the customer experience. This session will answer these questions:

- Which operational CRM technologies can positively impact the customer experience?
- What techniques and vendors are appropriate for true enterprise feedback management?

Jim Davies, Research Director, Gartner

General Sessions

K1-A.CRM Scenario: Why the Future of CRM Will Look Very Different Than The Past

CRM used to be an easy concept: simply automate sales, marketing and customer service. But the world and customers have changed. It's time to rethink what CRM is, and is not. A new CRM world is coming where we will see new market leaders emerging based on their ability to harness the power of CRM. This presentation will look at the shift from

technology-focused CRM to its rightful place as business strategy, and explain why firms must stop worrying about how to meet their internal needs and start to understand their customers' needs instead.

Scott Nelson, Managing VP, Gartner

K2. The Science of Delight — Putting the Service Profit Chain to Work for Sustainable Competitive Advantage

World-class companies apply a proven management system to deliver superior value to customers, employees and shareholders. This keynote session will report on the findings of a recent research study of high-profile organizations by The Service Profit Chain Institute.

Joe Wheeler, Executive Director, The Service Profit Chain Institute

K3. Made to Stick: Why Some Ideas Survive and Others Die.

Dan Heath explores why some ideas thrive while others die and how we can improve the chances of worthy ideas. Through a variety of success stories (and failures), this keynote will show you the principles of successful ideas at work—and how we can apply these rules to making our own messages “stick.” This session will transform the way you communicate ideas as Heath reveals the anatomy of ideas that “stick” and explains sure-fire methods for making ideas stickier, such as violating schemas, using the Velcro Theory of Memory, and creating “curiosity gaps.”

Dan Heath, Consultant at Duke Corporate Education

K4. Not Just Loyalty, Engagement: Presenting the latest findings from a new Peppers & Rogers Group research study

New quantitative research from Peppers & Rogers Group and Carlson Marketing gets to the heart of what drives loyalty, engagement and relationship strength. It investigates the impact of marketing initiatives and loyalty programs, and how these efforts differentiate companies in their competitive space. Six individual studies focus on specific vertical segments that include financial services, retail, automotive, travel & hospitality, telecom and high-tech.

Martha Rodgers & Luc Bondar of Peppers & Rogers Group

K5. Gartner Predicts — Open Research Meeting

We invite you to participate in an open research meeting with Gartner analysts and other conference dele-

Session Descriptions

gates as we explore several important ideas and build new strategic assumptions around those topics.

Power Breakfast

PB1. Its So 2.0 Out There: Customer Engagement and The Power of Social Media Conversations

This power breakfast will help accelerate your customer engagement strategy and answer these questions:

- What and how are contemporary customers thinking?
- Why is embracing customer engagement as your strategy good, rather than dangerous?
- Why are blogs, pod casts, wikis, social networks, and user generated content valuable tools for the creation of customer advocates?

Paul Greenberg, Author: CRM at the Speed of Light, Chief Customer Officer, BPT Partners

Track A: CRM Strategy

A1. How to Create a CRM Vision and Strategy

This presentation will examine how to create a CRM vision and strategy by examining the following key issues:

- What are the elements of a successful CRM Vision and Strategy?
- How should organizations execute the strategy to maximize the chance of success?
- Which examples best exemplify CRM Strategy success?

Scott Nelson, Managing VP, Gartner

A2. 1000 CRM Projects Can't be Wrong! Lessons From Those Who Have Gone Before

Implementing a CRM project is often one of the most challenging exercises a project manager will face in his or her career. From 2003 to 2007, Gartner captured information on more than 1000 CRM projects involving external service providers. This session will highlight the key trends and shifts affecting CRM implementations that we identified from those projects.

- What are the key trends in CRM implementations?
- What are the best practices for evaluating and selection an ESP?
- Who can help me implement my CRM solution?

Matt Goldman, Research VP, Gartner

A3. Using Metrics to Build Strong, Profitable Customer Relationships

Metrics are one of the most difficult elements of a CRM initiative to get right — and one of the most crucial

for CRM success. Poorly-designed metrics result in organizational confusion and poor investment of scarce resources. Well-designed metrics provide early guidance to help improve future performance. This session will outline the key elements in a successful set of CRM metrics.

- What role do metrics play in ensuring CRM success?
- How can enterprises identify and apply the right metrics for CRM success?

Gareth Herschel, Research Director, Gartner

A4. The Market for CRM

The presentation addresses driving forces and trends affecting the CRM software market today, and explores the key issues of how the market is evolving and where investments are being made. A discussion of CRM market performance and future outlook is framed in the context of global shifts, major players, and current challenges within the marketplace. The impact of new technology forces and deployment models such as Open Source Software, Services Oriented Architecture, and Software as a Service are also discussed. The session concludes with recommendations for business and technology strategies to consider implementing today.

Sharon Mertz, Research Director, Gartner

A5. Case Study

Go to gartner.com/us/crm for updates.

A6. Effectively Using Change Management to Generate CRM Success

Organizations that succeed at a CRM strategy consistently leverage change management as a strategic driver. This session will outline how enterprises can best align Organizational Change, Incentive Management, and Channel Management.

- Communications & Collaboration in order to drive end-user adoption, tactically structure cross-functional teams, minimize political infighting and build consensus and mobilization around key CRM goals and principals.
- How can change management help drive ROI and CRM success?
- How should enterprises use change management for implementing CRM during various phases of an implementation?

Isher Kaila, Research Director, Gartner

A7. Improving the Customer Experience: Satisfaction, Loyalty and Branding

Improving customer satisfaction remains the most common goal for

a CRM project — and improving customer loyalty is one of the top five. Both are different measurements for improving the customer experience. This session will answer these questions:

- What is the latest theory behind customer experience management?
- What are the strategies and implementation approaches of leading organizations?
- Where is the best place to start?

Ed Thompson, VP Distinguished Analyst, Gartner

A8. Using the Business Case to Increase the Success of Your CRM Project

Many IT projects fail to meet their originally stated business objectives due to a lack of a common understanding among the key stakeholders. Our research shows that quantifying the benefits is a value-added process that can greatly increase the success of new projects. We'll answer:

- What is the process for building an effective business case for your CRM project?
- How can business metrics be used to quantify the benefits of your project?
- How can the business case be used to manage your project throughout its entire life cycle?

Michael Smith, Research VP, Gartner

Track B: Marketing

B1. The CMO Challenge: Transforming Marketing to a Profit Center

CMOs must shift their focus from being solely creative-minded, and run marketing more like a business. Strategies and processes that transform marketing by reducing costs and helping the company grow revenue faster will be explored.

Key issues include:

- What are the top marketing processes for the 21st century?
- How does enterprise marketing management transform marketing?
- How do you select technologies and vendors for Enterprise Marketing Management?

Kimberly Collins, Research VP, Gartner

B2. Driving Customer Loyalty Through Highly Relevant Marketing

True customer loyalty means that customers have a long-term affinity towards your company's brand, products and services. Successful Campaign Management nurtures this affinity by allowing marketers to continually understand and even anticipate what customers want and when

they want it. Key issues include:

- What are the opportunities for organizations utilizing the customer-aware campaign management?
- How will organizations take advantage of multi-channel interactions to drive loyalty?
- Which technologies will be best suited to support present and future customer-aware channels?

Adam Sarner, Principal Research Analyst, Gartner

B3. Improving Marketing Operations and Resource Allocation with MRM

To become more accountable and to fully support the company's CRM objectives, marketing must align its resources strategically for improved execution. Marketing Resource Management or MRM is an emerging competency that applies process reengineering and analytics to optimize the use of marketing resources (financial and human). This presentation details:

- What are the 5 key competency and process areas of MRM, and how do you determine your focus?
- How do you select vendors and solutions to support MRM?

Kimberly Collins, Research VP, Gartner

B4. Case Study Panel: Customer Champions: Engineering the Customer Experience Moderated by 1to1

Customer experience management influences all aspects of business. As customer expectations rise, how can business and marketing executives refine experiences over time to drive innovation, lock in loyalty, and grow profits?

A panel of 1to1 Customer Champions from leading brands will address key aspects of the customer experience puzzle.

Get answers to such key questions as:

- How does customer experience management fit into brand positioning?
- What's the key to communicating the experience — and its alignment to the brand — to customers?
- What are best practices for using social networking, online video, and other emerging brand-building?

Moderated by Ginger Conlon, 1to1 Magazine Editor-in-Chief

B5. Using Segmentation to Drive Customer-Centricity

Customer Segmentation and the art of "treating different customers differently" is the core competency of leading marketing organizations. This presentation will show marketers how to select, gather and analyze data collected from multiple

Session Descriptions

sources and implement applications to effectively respond to segmented customer data. Key issues include:

- How should companies collect and manage customer data for segmentation?
- What are the best practices for customer segmentation and which technologies can help?

Adam Sarner, Principal Research Analyst, Gartner

B6. Aligning Marketing and Sales Through Improved Lead Management Processes

Lead management has typically meant different things to sales (opportunity management) and marketing (demand generation). To drive revenue growth, companies must redefine lead management as a business process that extends across marketing and sales. This session will cover:

- How do you redefine lead management strategy and processes?
- What are the key components of a lead management solution?
- How do you select vendors for lead management?

Kimberly Collins, Research VP, Gartner and Rob DeSisto, Research VP, Gartner

B7. E-Marketing Facilitates The Customer's Buying Process

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, e-marketing technologies can improve the customer experience and influence the customer. Key issues include:

- What are the drivers fueling the growth of e-marketing?
- How can enterprises develop e-marketing techniques to move customers towards a purchase?
- How will technology evolve to deliver solutions in the future?

Adam Sarner, Principal Research Analyst, Gartner

B8. Improving Marketing Performance Through Analytics

Database marketers have long used analytics to segment and target customers. The concept of analytics must expand to determine the ROI of marketing initiatives, enabling companies to make real-time campaign decisions and improve long-term planning. This session will explore:

- What are the benefits of applying analytics to the marketing function?
- How do you create a framework for marketing performance management that meets the needs of different marketing roles?
- What are the major trends and ven-

dors for marketing analytics?

Kimberly Collins, Research VP, Gartner

Track C: Sales

C1. Maximizing Value From Sales Force Automation

This presentation will provide both tactical and strategic advice to improve current or future sales technology deployments, including prioritizing applications, vendor evaluation frameworks and deployment best practices. Key issues include:

- How will sales organizations derive value from sales force automation applications?
- How will sales applications and vendors support sales organizational goals and objectives?
- How will sales technology evolve to increase revenue over the next 5 years?

Rob DeSisto, Research VP, Gartner

C2. Selling in Web 2.0 World

A shift towards improving the overall customer sales experience online is driving the use of Web 2.0 e-Commerce technologies. These new capabilities enable enterprises to improve customer interactions and shopping experiences. Enterprises seeking to increase web and overall sales must choose wisely when leveraging these new options. Key issues include:

- How can AJAX help internet based selling?
- How will companies leverage Web 2.0 technologies to sell?
- How will product reviews contribute to web sales?

Gene Alvarez, Research VP, Gartner

C3. Sales Performance Management: Foundation for Success

This presentation reveals how sales performance management provides a strong foundation for growing sales through improved organization of territory, quota and incentive compensation processes.

- How are sales functions interrelated and decisive in improving sales performance?
- What are the strategies, technologies and vendors that can automate and integrate these practices?

Mike Dunne, Research VP, Gartner

C4. Sales Analytics: Turning Insight into Opportunity

Enterprises are accumulating vast amounts of information on prospects and customers. To meet corporate

revenue targets, sales organizations will need to investigate analytic technologies to improve processes for sifting through data assets and detecting and exploiting sales opportunities more effectively. This presentation will answer these questions:

- What strategies and best practices are best for adopting sales analytics?
- What is the evolution of the vendor communities delivering relevant technologies?

Mike Dunne, Research VP, Gartner

C5. Case Study

Go to gartner.com/us/crm for updates.

C6. Aligning Marketing and Sales Through Improved Lead Management Processes

Processes Lead management has typically meant different things to sales (opportunity management) and marketing (demand generation). To drive revenue growth, companies must redefine lead management as a business process that extends across marketing and sales. This session will cover:

- How do you redefine lead management strategy and processes?
- What are the key components of a lead management solution?
- How do you select vendors for lead management?

Kimberly Collins, Research VP, Gartner and Rob DeSisto, Research VP, Gartner

C7. Best Kept Secret: Growing Margins With Price Optimization

Despite significant return on investment by early adopters, pricing optimization continues to be one of the best kept secrets in the business application market. This presentation will help businesses set, execute and analyze pricing to exceed revenue and profit targets by using price optimization and management software. Key issues include:

- How will pricing strategy affect revenue and profitability?
- How will technology impact an organizations ability to optimize pricing?
- How will companies evaluate and implement price management software?

Rob DeSisto, Research VP, Gartner

C8. Increasing Close Rates with Sales Effectiveness Technologies

Enterprises want to increase revenues from sales channels. Two measures for achieving this outcome are increasing the time available for sales persons to actually sell and improving the

impact of activities in sales cycle in winning business. This presentation will highlight:

- What key technologies help sales personnel handle preparatory tasks more efficiently?
- How can selling skills and messages be refined and engage prospects more persuasively?

Mike Dunne, Research VP, Gartner

Track D: Customer Service

D1. The Secret to Delivering Superior Customer Service in the Contact Center and Beyond

Chief executives are demanding that IT deliver tools to provide differentiated customer service. By analyzing the best practices of the world's best customer service organizations, we will see how to select the best processes, business applications and channel strategies to differentiate your customers' experiences. We'll look at:

- How can service organizations develop service metrics, and prioritize projects based on highest business value
- What is the best way to deploy a combination of self service and contact center technologies to support new processes?

Michael Maoz, VP Distinguished Analyst, Gartner

D2. Break Barriers Between the Contact Center and Business

The Internet, VoIP, mobility, and speech have irrevocably changed contact centers and customer expectations. Success will rely on your ability to harness the entire company into the next generation of customer service and will require both technology and business process change. In this session we will cover:

- How are contact center technologies and practices evolving?
- How will customer interaction methods and patterns change?
- Which approaches and practices will be most effective?

Drew Kraus, Research VP, Gartner

D3. Enterprise Feedback Management: Truly Knowing What Customers Want

Over 60% of customer service organizations today carry surveys — and most of them still don't understand their customers, what they are thinking — or even if they are truly satisfied. Analyzing the information collected, moving to act on customer's demands, and continuing the cycle of feedback management is the biggest challenge. This presentation will answer:

- How can a good feedback management solution be implemented?

Session Descriptions

- What is to be done with the information collected, and how can you be sure it provides for customers' needs and demands?

Esteban Kolsky, Research Director, Gartner

D4. "Voice Self-Service: Better Than Live Agent?"

The rewards and pitfalls of self-service revolve around balancing cost and quality — self-service being cheaper on the one hand, and human service being better on the other. Personalized automation is not an oxymoron, and can be achieved. We'll explore:

- What are the key trends and practices in voice self-service?
- Which technology and approaches work best?
- What voice self-service solutions are leading companies deploying?

Drew Kraus, Research VP, Gartner

D5. Case Study

Go to gartner.com/us/crm for updates.

D6. How Analytics Changes the Future of Customer Service

Investment in customer service analytics accounts for less than 1% of overall customer service investment, but for service to improve, so must an organization's analytical capabilities. The challenge is not just to collect it, but to use it to more effectively drive customer service performance. Key issues include:

- What are CSS analytics?
- How do we use CSS analytics to improve the efficiency of service delivery in the contact center?
- How do we use CSS analytics to drive more effective service delivery?

Jim Davies, Research Director, Gartner

D7. How to Manage Customer Service across Channels and Functions

As more organizations take control of expanded demands for multi-channel customer service, they often face the internal demand to handle more functions concurrently. Deploying multiple solutions, each independent of each other, is an expensive and complex proposition. This presentation will discuss:

- What is the best way to create a single solution that can tackle all the channel and functions needed for customer service?
- How do you design a multi-channel, multi-function solution for customer service?

Esteban Kolsky, Research

Director, Gartner

D8. Contact Center Performance Optimization: The Consolidated Suite

WFO suites are dramatically changing the contact center technology vendor landscape. The unification of traditionally "silo-ed" tools for managing the contact center workforce from scheduling to call recording and their alignment against corporate objectives is helping to revitalize the contact center and demonstrate its accountability.

- What are the drivers, challenges and core technologies?
- Which vendors are shaping this evolving market?

Jim Davies, Research Director, Gartner

Track E: CRM Technologies

E1. CRM Architectures and Technology Platforms: Evolving Towards SOA. Are We There Yet?

CRM architectures and technology platforms are undergoing major changes as they steadily embrace SOA principles. This session explores those changes, scrutinizes the strategies of key CRM vendors and examines how organizations can prepare themselves for this brave new world. Key issues include:

- How will CRM architectures and technology platforms evolve and what will be the business benefit?
- How will the vendors evolve their CRM applications to embrace SOA?
- How can organizations take advantage of the evolution of CRM applications towards SOA?

John Radcliffe, Research VP, Gartner

E2. Knowledge Management and My CRM: How Can We Bring the Hype to Life?

Almost all organizations have some knowledge management (KM) practices embedded in their CRM program — but most want and need much more. By knowledge-enabling the full spectrum of CRM, organizations can create internal business value as well as value for their customers and business partners. Key issues include:

- How will KM contribute to CRM in 2007 and beyond?
- Which KM practices will add business value for your CRM program and its stakeholders?
- How and where should I tackle KM in my CRM program?

Kathy Harris, VP Distinguished Analyst, Gartner

E3. The Role of SaaS in the Future of CRM

Software as a Service is of high interest, fed by the promise of lower cost of ownership and reduced lock-in to enterprise application vendors. However, many challenges exist for this model such as data security, customization, architecture, scale and integration. Moving way from a departmental focus to an enterprise-wide deployment to support a 360-degree view of customers will be a serious challenge. Key issues include:

- How will companies adopt software as a service?
- What will be the future of software as a service for CRM applications?
- Which vendors will best enable CRM software as a service?

Rob DeSisto, Research VP, Gartner

E4. CRM in Motion: Wireless for Sales, Field Service and B2C

Wireless is now mainstream in many CRM applications. Yet many organizations remain on a treadmill of tactical deployments and struggle to extend the reach of CRM solutions to 100% of their mobile workforce. At the same time, growing customer expectations are testing the scalability and agility of IT architectures. In this session we'll examine:

- What does the future hold for mobile devices and networks? What vendors are best positioned to support wireless CRM applications?
- How key CRM applications like Field Service Management evolve through 2012?
- How can organizations best architect mobile solutions to remain agile yet maximize the value of CRM application platforms?

William Clark, Research VP, Gartner and Michael Maoz, VP Distinguished Analyst, Gartner

E5. Using Consumer Technologies for CRM

Companies willing to apply consumer technologies can quickly and cost-effectively deploy solutions that will extend the reach of legacy solutions — or even re-invent the way organizations interact with internal and external "customers".

- When should organizations evaluate and deploy consumer technologies?
- Which consumer technologies will be most useful in supporting CRM initiatives?
- What are the organizational requirements to successfully deploy consumer technologies?

Matt Goldman, Research VP, Gartner

E6. Creating and Leveraging the Single Customer View: How Can You Achieve Nirvana?

Interest in creating the "single view of the customer" is high. Data quality, data integration and data governance are key to success, and there is a strong trend towards adoption of packaged customer data integration (CDI) solutions. Key issues include:

- What are the business drivers and barriers for creating the single customer view?
- What are the different approaches to achieving the single customer view and how can you leverage it?
- What best practices will help in creating the single customer view with CDI and how will they evolve?

John Radcliffe, Research VP, Gartner

E7. Must-Have Advanced Analysis for Customer Insight

Competing on analytics is a fact of life for many enterprises. Although the optimal use of analysis remains a key requirement for success, the ability to incorporate emerging concepts such as text mining, social network analysis, and enterprise decision management will have a profound impact on their success. Key issues include:

- What advanced analysis concepts should we be considering over the next five years?
- How should we prioritize these for investigation and investment?
- How do we justify investments in these concepts?

Gareth Herschel, Research Director, Gartner

E8. CRM Vendor Landscape: How to Leverage Emerging Trends and Tackle Long-Term Uncertainties

The fourth generation of CRM systems will emerge in 2008, at the same time that the CRM market will appear to stabilize after the M&A disruptions of 2004-2007. Yet the recent short-term disruptions have masked some of the longer term discontinuities in this market. We'll explore:

- How will organizations choose the best software while avoiding lock-in to an enterprise application suite?
- How will Software as a Service, Web 2.0, business intelligence and demand for SOA impact decision-making?
- How will Salesforce.com's innovations impact Oracle, SAP, and Microsoft?

Michael Maoz, VP Distinguished Analyst, Gartner & Ed Thompson, VP Distinguished Analyst, Gartner

Real-world CRM at its best.

2006 CRM Excellence Award Winners' Case Studies

BNSF Leverages CRM for Accelerated Success

Burlington Northern Santa Fe Railway, one of the largest railroad firms in North America, succeeded in maintaining momentum and vision on a multiyear CRM road map and solution. They leveraged a multilayered view of its customers to drive greater interaction capabilities with them. The company's CRM success was accelerated by a clear and robust vision on what CRM meant for the organization and by the collaborative partnership formed by executive stakeholders and the end-user contact center agent community in driving the CRM solution forward.

Critical Success Factors

- Strong Executive Sponsorship Determines Success
- Having a Clear CRM Vision and Road Map Is Mandatory
- Engaging End-User Community Early and Often

AIS Evolves With CRM to Remain the Industry Leader

The program success of Thailand's Advanced Info Services has demonstrated how CRM can deliver business benefits and market dominance in an Asian industry marked by high customer churn rates. There are several key reasons why AIS's CRM innovation road map has driven bottom-line success. Faced with high customer dissatisfaction and churn rates, Advanced Info Services didn't simply take its industry leadership position in the Thai wireless industry for granted. AIS leveraged a CRM transformation road map named "C-Care," which uses the Gartner Eight Building Blocks of CRM as a strategic lever. With a more than a 55% share in the Thai communications market, improved service levels, and a new, robust and integrated customer loyalty program, the company continues to be the market leader.

Critical Success Factors

- Full Involvement of AIS's Key Resources at All Stages
- Clear Vision, Objectives and Business Requirements
- Setting Realistic Expectations

GBC Wins with Innovative Changes to CRM Strategy

General Binding Corp. (GBC) is a U.S.-based manufacturer of document-finishing equipment. Outdated and unsupported field service infrastructure made it necessary to upgrade GBC's field service technology. This case study shows how a necessary change can become an opportunity to innovate. GBC used the mandatory replacement of aging field service architecture as an opportunity to expand its relationship with customers. The company took advantage of the new technology to help field service agents, as well as other areas of the business, to respond to customer needs quickly with access to time-critical information, such as parts availability and ordering. This important extra step resulted in what customers now see as a responsive high-tech service organization, which is reflected in GBC's increased customer satisfaction scores and retention results.

Critical Success Factors

- Creating Corporate Wide Ownership of Customer Satisfaction
- Encouraging Collaboration to Facilitate Real Improvement to the Customer Relationship
- Communicating Customer Feedback is Key

Gartner CRM Excellence Award

2007 North American Program

Now in its fifth year, the prestigious Gartner CRM Excellence Award signifies a true commitment to placing the customer first. Designed to recognize the best CRM initiatives in North America, the award designates winning organizations – based on peer review – as a leader in CRM. Three finalists will be selected by Gartner and the award Media Sponsors from submitted case studies and supporting documentation. A popular vote by Gartner Customer Relationship Management Summit attendees will determine the winners in two categories. This year, you are invited to participate – and show top industry players from world-class organizations the true meaning of CRM excellence. Entries may be submitted no later than July 25, 2007. Our three finalists will be contacted by August 13.

gartner.com/crmexcellence

Event Sponsors

SPONSORSHIP OPPORTUNITIES

For further details please contact:
Ed Medeiros at 1 203 316 6004 or
ed.medeiros@gartner.com

PREMIER



Oracle (Global Partner)

Oracle's business is information - how to manage it, use it, share it, protect it. For nearly three decades, Oracle (NASDAQ: ORCL), the world's largest enterprise software company, has provided software and services that enable organizations to get the most accurate and up-to-date information from their business systems. Today, Oracle has over 275,000 customers - including 98 of the Fortune 100 - in more than 145 countries.

oracle.com



RightNow Technologies

RightNow delivers the high-impact CRM solutions and services organizations need to cost-efficiently deliver a consistently superior customer experience across their frontline service, sales and marketing touch-points. Providing superior customer experiences is the single most powerful way for companies to establish sustainable differentiation. Approximately 1,800 corporations and government agencies worldwide depend on RightNow to achieve their strategic objectives and better meet the needs of those they serve. RightNow is headquartered in Bozeman, Montana.

RightNow.com



SAP Labs (Global Partner)

As the world's leading provider of business software, SAP delivers business solutions to more than 39,400 customers in more than 120 countries around the world. SAP CRM has helped the best run companies in more than 25 industries achieve operational excellence by helping organizations to streamline business processes across and beyond customer touch points, while enabling companies to become more agile to changing business and customer needs for sales, marketing and service.

sap.com

PLATINUM



SAS Institute

SAS is the leader in business intelligence and analytical software and services. Customers at 43,000 sites use SAS® software to gain insights from their data, resulting in faster, more accurate business decisions for implementing customer-centric strategies. Since 1976, SAS has been giving customers around the world THE POWER TO KNOW®.

www.sas.com



Teradata

Teradata, a division of NCR, is the global leader in enterprise data warehousing and enterprise analytic technologies and services. Teradata gives companies a single, integrated view of their businesses so they can make better, faster decisions that drive growth and profitability. Teradata can help you see your business like never before.

www.teradata.com



Microsoft

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 and Outlook user experience, Microsoft CRM provides the easiest and most natural way to deliver powerful, CRM capabilities from the applications that employees use every day.

www.microsoft.com/dynamics/crm

SILVER

Aprimo, Inc.
Convergys Corporation
DataFlux
DataLever Corporation
Dexterra
eLoyalty Corporation

Graham Technology plc
Neocase Software, Inc.
RWD Technologies
Sage Software
Siperian
Sterling Commerce
Unica Corporation

MEDIA PARTNERS



Register Today!

3 Ways to Register

Web: gartner.com/us/crm
Telephone: +1 800 778 1997
or +1 203 316 6757
Email:
gartner.events@gartner.com

REGISTRATION FEES

Conference registration fee includes: conference attendance, documentation and planned functions

Early Bird Price: \$1695
(applies if credit card payment is received by July 23, 2007)

Standard Conference Fee: \$1895

SPECIAL COMBINATION PRICING

Attend Gartner Customer Relationship Management Summit, September 17-19 AND Gartner Master Data Management Summit, September 19-21 – both at the Westin Diplomat in Hollywood – and save \$895!

Combo Early Bird Price: \$2395
(applies if credit card payment is received by July 23, 2007)

Standard Combo Conference Fee: \$2695

HOTEL INFORMATION

Make your hotel reservations directly with the hotel at the same time you register for the conference.

The Westin Diplomat
3555 S. Ocean Drive
Hollywood, FL 33019
Phone: 1 888 627 9057





**Master Data
Management
Summit 2007**

September 19-21
Hollywood, FL
gartner.com/us/mdm

Co-Located Event

Come for CRM. Stay for MDM.

A new data discipline that delivers a true view of your business — Master Data Management

You can't make the right decisions about your products, customers or operations if you don't see them clearly. Success depends on a true enterprise view – based on timely, accurate information that can be accessed and shared by everyone in your organization.

Master Data Management (MDM) is bigger than any single application domain. Bigger than every SOA, ERP, SCM, PLM, CRM, compliance and integration project put together. Why? Because MDM is a new data discipline that delivers a single view of the truth – your company's set of “control” data that serves as a foundation for operational excellence, cost reduction, innovation and growth.

What is Master Data Management (MDM)?

Practiced by both business and IT, Master Data Management (MDM) is a collaborative process that ensures accuracy, uniformity, accountability and stewardship of core enterprise information assets.

Three tracks cover it all.
All in three days.

A

**Creating Value with
Customer Data
Integration**

B

**Improving Business
Performance with
Product Information
Management**

C

**Enterprise Information
Management**

Take CRM to the next level with MDM.

Master Data Management and Customer Relationship Management are a natural fit – which is why it makes sense to add the Gartner Master Data Management Summit, September 19-21, to your Gartner Customer Relationship Management Summit itinerary. In just two days, you'll take your understanding of CRM principles and practices to the next level, and enjoy special pricing too – total savings of \$895! Call 1 800 778 1997.

Why choose Gartner for MDM?

Only Gartner offers an event fully dedicated to the processes and practices of MDM. Our intensive two-day, 24-session Summit puts every MDM issue front and center – a comprehensive program brought to you by Gartner analysts who are undisputed leaders in their field. You'll leave the Summit with the knowledge and ability to master your data management initiatives to reduce costs, increase revenue and accelerate growth, as well as significantly improve compliance, business agility, data quality, reporting accuracy and more.

Gartner

56 Top Gallant Road P.O. Box 10212 Stamford, CT 06904-2212 USA

PRESORTED
STANDARD
U.S. POSTAGE
PAID
GARTNER

Priority Code:

© 2007 Gartner, Inc. and/or its affiliates. All rights reserved. Gartner is a registered trademark.

Gartner
Customer Relationship
Management
Summit 2007

The New Age of CRM Leadership

September 17-19
The Westin Diplomat
Hollywood, Florida
gartner.com/us/crm

Go to gartner.com/us/crm to reserve your place, or call **1 800 778-1997** for assistance.

Early Bird!
Save \$200 when you register by July 23.

This year, Gartner Customer Relationship Management Summit is co-located with Gartner Master Data Management Summit. Register for both Summits and save \$895! See page 15 for details.

CRM Frequently Asked Questions

Q. How is a successful CRM vision and strategy created?

A. Start by taking the time to understand your customers, your processes and your key business issues and opportunities.

Q. Which strategic processes must be automated for competitive advantage?

A. New processes are better able to deliver innovation and competitive advantage, while older processes will not.

Q. What is the role of marketing, sales, customer service and ecommerce in CRM?

A. Marketing, sales, customer service and ecommerce must align and collaborate in order to define and manage the cross-functional customer processes that deliver business results.

Q. Which metrics should be used to measure CRM success?

A. Simply put, what gets measured is what gets done. Choosing the right metrics is critical to the measurement of your CRM initiatives as well as determining real business results.

Q. Which emerging technologies and applications enable the new age of CRM?

A. Consumer technologies, Web 2.0, podcasts, blogs, community marketing, MRM, field service management, customer feedback management and marketing performance management.