

## Event Highlights Brief



# Gartner Portals, Content & Collaboration Spring Summit 2007

Relive the Summit and Share This Brief with Your Colleagues

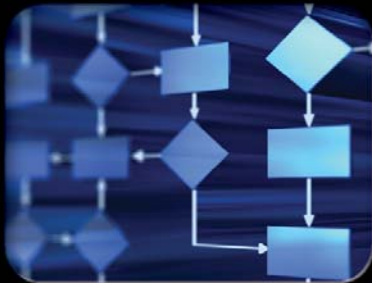
Here is a review of our  
March 2007 Portals, Content  
& Collaboration Summit.

For the latest information  
on our Fall 2007 Summit,  
visit [gartner.com/us/pccfall](http://gartner.com/us/pccfall).

Our Fall Summit is co-located  
with Gartner Web Innovation and  
Gartner Open Source Summits.

## Gartner Portals, Content & Collaboration Summit 2007

March 19-21, 2007  
Hyatt Regency Grand Cypress  
Orlando, FL



## Orlando, FL: **800+ Professionals** Explore New Technologies and Management Practices in the High-Performance Workplace

**Hundreds of IT and business professionals gathered March 19-21 in Orlando, Florida for the second Gartner Portals, Content & Collaboration Summit. The attendees left fired up with ideas and plans. You can bet they are back at their enterprises now stirring up new collaboration initiatives to enable innovation.**

A mix of IT and business representatives – including CIOs, CKOs, business intelligence professionals, IT architects and application development managers – spent 2 1/2 days learning as much as they could about portals, content management, search and collaboration. And – most importantly – how to drive business innovation in their organizations.

**A total of 32 brand-new sessions were presented through four tracks on ...**

- Portals
- Content Management
- Collaboration
- Management Issues

**A team of 20 globally-renowned Gartner analysts led the information-sharing ...**

Their goal was to bring the audience up-to-date on the very latest and most objective research and best practices. And that they did in idea-packed sessions, open and breakfast sessions, pre-conference tutorials, riveting keynotes and stimulating panels. In addition, the analysts gave customized advice to eager clients in over 160 One-on-One sessions.

“20 analysts x 50 weeks a year equals 1,000 weeks of thinking,” Tom Austin, Conference chair, said in his welcome address. The powerful depth and breadth of research presented over the 2 1/2 days illuminated what’s new in the portal, content and collaboration market and how to turn state-of-the-art innovation into a competitive advantage.

**Everywhere you turned there were opportunities to collaborate ...**

“This is a collaboration program,” Beth Ranney, Program Director, said. Indeed, collaboration was going on all over the place. Attendees collaborated with peers in 12 topic-specific, moderated user roundtables ... in the Alumni Lounge ... and with vendors at the Solution Showcase and in the Hospitality Suite. Hallway conversations in between the sessions were ongoing, on everything from Web 2.0 and e-discovery to social software and user interaction.

**Case studies addressed the big question on everyone’s mind ...**

How do you make innovation happen in the real world? Attendees got the answers they were looking for in case studies led by practitioners from Altria Group, Inc., ConAgra Foods, Inc., Harvard Business School Publishing, Loyola Marymount University and Morrison & Foerster LLP, Best Buy, PMP, CSC, Duke University, Wyeth and Catholic Health Initiatives.

**Gartner High-Performance Workplace Excellence Award 2007 And the winner is ...**

Summit attendees voted Benjamin Moore & Co. as the winner of this year’s High Performance Workplace Excellence Award. The award was given to Benjamin Moore & Co. for connecting their independent U.S. retailers with a portal that enabled over 4,000 independently-owned retailers to interact more effectively. “We are honored to be recognized by Gartner, as well as recognized among this elite group of companies,” said Kurt Reisinger, Web Development Manager for Benjamin Moore & Co. “We attribute our success to including our customers in the planning process, having the freedom to make decisions with support from executive management and being able to make changes on the fly during the process if a change in course would improve the end results.”

**The two other finalists – Applebee’s International and Barclays Capital – presented their intriguing case studies:**

Applebee’s International’s Adam Zabel shared how they created an interactive portal for store managers, staff, corporate employees and executives that improved communication, productivity and cost control. Barclays Capital’s James Deighton described a persistent group messaging system they rolled out in six months to 10,000 users in 23 different countries to reduce costly and time-consuming phone calls and overwhelming e-mail threads.



# Keynote Highlights



## Wikinomics – How Mass Collaboration Changes Everything, *Don Tapscott, Business and IT Strategist and Best-Selling Author*

Don Tapscott predicts the next major trend – and the biggest change of the century for the corporation – is collaboration on a mass scale. Whether your organization embraces or squelches collaboration may well determine your future. In his inspiring, funny and wide-ranging keynote address, he focused on how we can harness the power of the masses. He described **four drivers** that are creating the “perfect storm” and changing the corporation: **Increased broadband availability, geographic spatiality, true multi-media, and Web services.** He discussed the rise of the first generation to grow up digitally and how – if you want to understand the changes ahead – you must see the world through their lens.

## Revolutionary Workplace Performance and Technology Changes

*Tom Austin, VP and Gartner Fellow, Gartner*

“Welcome to the post-digital world,” Tom Austin said. New employees coming into the workplace are wanting more and more technology. “How are you going to keep them down on the farm?” You’re going to have to innovate. Using Goldcorp and Procter & Gamble as case study examples, he described how companies have transformed themselves using IT as an enabler. He detailed four overarching mega trends, how workplace technologies fit into the enterprise, where to look for return beyond ROI and governance and management issues. His advice:

- Don’t over engineer – allow social controls to work
- Tread carefully with proactive measures as you go forward
- You need to invest to rapidly raise agility
- Question your assumptions
- Incent people to help others
- Encourage user-driven experiments

## Surviving the Onslaught of New Products and Technologies in 2007

*Mark Gilbert, Research VP, David Gootzit, Research Director, and Jeffrey Mann, Research VP, Gartner*

Products are changing. Vendors are consolidating. “You can’t do nothing or close your eyes,” Mark Gilbert warned. You certainly don’t want to block consumer technology in the workplace. He examined new trends and the business benefits and how to make decisions about emerging technologies.

Alternative business models to licensed software: Are they for you? What are the large ISO’s bringing to the table in 2007? How can you quantify the business benefits of technology? Should you upgrade? “If you’re not leveraging technology less than two years from mainstream, you are behind,” David Gootzit warned. The team’s guidelines advice:

- Size does matter – the size of the vendor and your organization
- Go best of breed if you can afford it
- Allow some 2.0 technology and providers in your enterprise
- Embrace available standards while understanding the liabilities

## Users vs. Lawyers vs. IT: Who is Running Your Business? *Debra Logan, Research VP, Gartner*

IT wants standardization. Users want creativity. Lawyers want it all locked down and saved. “There is a battle for the future of your business. No one can win. You can only reach an impasse,” Debra Logan said. How much risk do you face? How much opportunity is there in adopting Web 2.0 and other collaboration technologies? How do you manage the many tradeoffs? Debra cautioned the audience to not overstate the risks, but don’t ignore them either. Lessons learned:

- Don’t think about the technology first – think about the human element
- Take on the CFO. You don’t need to have ROI on every investment
- Allow for experimentation before you move to platform implementations
- Understand things are going to change
- Consider outsourcing – get someone to archive and store for you

**“A conference focused on collaboration as a key component of business success, with peers and analysts participating in lucid, open discussions”**

Todd Carlson  
IT Collaboration Services Manager  
Menton Graphics Corporation

## Gartner Analyst Panel: Bringing it All Together with Lessons Learned

*Moderated by: Jeffrey Mann, Research VP*

As the Summit drew to a close Wednesday afternoon, a panel of analysts gathered to summarize lessons learned. Here’s their recommended actions:

- Find a project where you can apply Web 2.0. Launch it within one week of the Summit
- Do a survey. Look for opportunities to reduce the number of repositories in your enterprise
- Look at projects underway. Find one where a social control could replace a technical control
- Go back and make sure you are focusing on the right people. Get a senior executive who is creative to be your sponsor
- Say no in some cases. Some things, like upgrades, you don’t have to do. The key is to prioritize
- Rather than focus on the problems and reasons not to do it, just do it



# Session Highlights



## Planning for the Five Major Upcoming Discontinuities in Portals, Content and Collaboration

“Let’s get real about certain major phenomena you are hearing about,” Tom Austin began. It’s not just each one individually you have to worry about but how they interact. He identified five major discontinuities – Open Source, SaaS, global class computing, Web 2.0, and consumerization – how they relate to each other and what you should do to protect your organization. If you’re not buying SaaS, should you? How can you link SaaS with global class computing so they are more powerful? Should you try to control the innovative users of technology in your organization? What are the real benefits of Open Source? How will Web 2.0 and the emergence of communities impact you? His advice:

- Follow the money – where the marketplace activity is
- Innovation occurs in the hands of users – let them be free
- Challenge what you are doing – this isn’t going away

**“The Gartner Portals Conference is key for new implementers as well as experienced, existing owners to learn the basics and what’s new in portal technology.”**

Cheree Ingram  
Portal Competency Center Manager  
Carefirst BCBS

## Orchestrating Revenue Growth with Workplace-Empowered Business Applications (CEVAs and WEBAs)

What are workplace empowered business applications (WEBAs) – including content-enabled vertical applications (CEVAs)? Why do they matter? What should drive your investment decisions? Toby Bell shed new light on this emerging class of solutions that integrate workplace functions with line-of-business applications. His recommendations:

- Inventory your mission-critical processes and what products are being used to manage them
- Decide what drivers are leading your implementation strategy
- Use a best-of-breed approach – if it fits with your architecture and strategy
- Use portfolio management to prioritize CEVA and WEBAs investment and development



## The Real World of Content Management: A Moderated User Best-Practices Panel

No one ever said managing content is easy. Three practitioners from these companies shared their content management “war stories” as well as their successes: Morrison & Foerster LLP, ConAgra Foods, Inc., and Altria. Topics included how they justify content management projects, best practices for managing and structuring content, how long to run a prototype and how to get users to buy into the system. At the end of the session, questions from the audience were fielded, such as: How do you deal with products that are constantly changing? What are strategies for handling training and support without getting bogged down? How do you capture unstructured data, like IM? Their recommendations:

- Approach taxonomy development by starting high level and refining over time
- Get people to put content into a repository by relying on automation
- Encourage users to buy into a system by spending lots of time planning and then building a prototype

**“Job Saver. Come with your objectives, bounce them off experts and peers, return to work with a refined set of objectives that improved opportunities for project success.”**

Wendy Fite  
Chief Application Development Office  
Administrative Office of the US Courts

## Managing Knowledge in an Interconnected World

In 2007, many organizations face the tough challenge of justifying knowledge management initiatives, optimizing best practices and using emerging technology. Jeffrey Mann covered all these issues in his “Knowledge Management 101” crash course. “Knowledge management is a formal initiative,” he stressed. It is not software, but methodologies and frameworks. “You do it – not buy it.” He gave specific guidance for where to start, insight into how the role of technology in knowledge management is shifting and tips for capturing knowledge from retiring employees – a growing challenge. Key take-aways:

- Knowledge management is a collection of best practices, not technologies
- The leading cause of knowledge management failure: People don’t use it and it slowly withers away
- In 2007, knowledge management can now really be about managing knowledge, not products



**“This is my first Gartner conference. I am expanding my knowledge of portals as a tool. We’re one of the first newspapers to use portals. I am seeing what other industries are doing.”**

Sharon Bradley  
Business-to-Business Online Marketing Manager  
The Dallas Morning News  
Dallas, TX



### Get Real in Real Time: How Presence, Conferencing and Voice Can Electrify Your Business Processes

“Presence is becoming a ubiquitous resource – the center of all communications,” David Smith said. However, today’s view of it is disjointed. “Applications aren’t important anymore – the interaction is.” He discussed how presence is evolving, the impact on existing architecture, market issues and how to benefit from presence. Attendees learned his views on how to extend presence through the business network, deal with trust and privacy issues and manage and minimize the risk to the enterprise. His advice:

- Don’t look at silos, look at forming synergies
- Unified communications are coming your way. Be ready
- You need to know when the business “you” switches to the private “you”

### Wikis and Social Software: How to Create and Harvest Value from Informal People Networks

Open collaboration is powerful. But many questions arise in the process. “Should your organization prescribe how people work or give them what they need so they can decide the best way for themselves?” “You should do both,” Nikos Drakos believes. He discussed what can be learned from the use of social software, how social software is being used to create business value, products and vendors and which are most suitable, and best practices for avoiding risk.

Key take-aways:

- There is value in social interactions
- You have to bring this new way of aggregating information into the organization
- If you are behind in giving users what they want, they will go somewhere else to get it

### Optimizing Collaboration Planning

You must develop a strategic plan around collaboration, according to Matthew Cain. So many activities are occurring around collaboration, you can’t leave them unmanaged. He discussed how collaboration creates business efficiencies, vendor dynamics and the impact on your collaboration investments, and technology and architecture assumptions to make when planning. “The business case is less about ROI and more about process efficiencies and competitive advantage.” Attendees took home a 12-step collaboration plan that included a center of excellence, inventory of applications and business metrics. Key take-aways:

- Collaboration is happening whether you like it or not
- Presence is at the heart of it all
- Complex technologies – like Exchange 2007 and OCS 2007 are emerging. You need to understand them
- Vendor dynamics are changing and will impact your collaboration investment

### Collaboration Inside a Business Ecosystem: Partners, Suppliers and Customers are Just a Click Away

You have to collaborate with suppliers. And you have to keep improving how you do it. “You may be doing EDI or e-procurement, but you need to go beyond data exchange and move to joint value creation,” Nikos Drakos said. He discussed why collaboration with suppliers is important, technical implementation issues and possibilities, and best practices. “Opportunities for external collaboration extend across the value chain,” he said. He covered what makes collaboration across the firewall so difficult. “There are the same concerns as with internal collaboration times 10.”

Key take-aways:

- Security can be a show-stopper. Don’t let it become an excuse for inaction
- You need to rebalance your strategy to focus on value creation
- You may get less participation if you put too many formal controls and processes in place
- Risk and control issues are increasing – who owns what, what are the compliance risks, is one player more powerful than the other?

**“To the point and very helpful. You get the benefit of focused information.”**

Ilene Lanfear  
Vice President Information Systems  
The Taubman Company  
Bloomfield Hills, MI

### Power Breakfast: PCC Summit User Survey Results—Supply Meets Demand in the Portal, Content and Collaboration Software Markets

Today’s portal, content and collaboration software markets are evolutionary and demand-driven. “You can’t be an ostrich and stand still and survive,” Tom Eid said. He gave the audience fresh insight into how interactions with vendors and users are changing, person-centered computing, new contract pricing terms and how 2007 is a transitional year because of all the new technologies. Tom then shared key results from the Gartner survey of attendees at the 2006 US and European Portals, Content & Collaboration Summits. Worth noting are indications of good alignment between business needs and IT investments and that organizations are seeking ways to improve workers abilities to do non-routine work. Key take-aways:

- Offering technology is not enough.
- Traditional products will not be enough
- You must understand new business model applications
- Know how to use Open Source strategically



## The word was definitely out.

The Summit is the place to connect with high-quality attendees in the portals, content and collaboration space – the people who matter when it comes to making and recommending purchases. This year's Summit represented a Solution Provider exhibition featuring 30 of the industry's cream of the crop.

Hundreds upon hundreds of IT and business professionals browsed the aisles of the Solution Showcase Monday and Tuesday. They didn't come just to look. They wanted answers to specific questions and, in many cases, to close in on decisions.

### Just being there raised the profile for this year's Sponsors ...

They reached people they normally wouldn't reach, showcased their products and capabilities, gained first-class leads and laid the foundation for future partnerships. Some Sponsors found they were running low on materials by Tuesday because of overwhelming interest – a great problem to have!

“People are in the early stage of decision-making. We like that. They're not just coming for tactical help. They are still sorting things out. We can help.”

**Matt Schmeltz, Acquity Group**

### Collaboration Between Sponsors and Decision-Makers was Easy Through ...

- Private meetings set up after show floor hours in the Face-to-Face Sponsor Lounge
- Solution Provider and Sponsor Case Studies where Sponsors presented their visions and shared how implementation happens in the real world
- The Hospitality Suite and Showcase Floor Reception where everyone enjoyed food and refreshments and the opportunity to socialize and relax after stimulating days of intense learning

## A Special Thanks to Our Sponsors

### PREMIER



### PLATINUM



### SILVER

Acquity Group  
Akamai Technologies  
Dialcom  
EMC  
Genesys Telecommunications Laboratories, Inc. An Alcatel-Lucent Company  
Hyland Software  
ImageNow by Perceptive Software, Inc.  
Interwoven, Inc  
Mainssoft Corporation

Open Text Corporation  
Parlano, Inc.  
PostPath, Inc.  
Recommind  
SiteScape, Inc  
TandemSeven, Inc.  
Vamosa  
Vivisimo  
Xerox DocuShare  
Zantaz

### Sponsor Opportunities:

For further details, please contact Rob Whitehurst, Tel: + 1 203 316 1733, Email: [rob.whitehurst@gartner.com](mailto:rob.whitehurst@gartner.com) (Companies A-M) or Dylan Williams, Tel: + 1 203 455 0498, Email: [dylan.williams@gartner.com](mailto:dylan.williams@gartner.com) (Companies N – Z)

# One Week. One Location. Three Powerhouse Summits.

**Gartner**  
Portals, Content &  
Collaboration  
Summit 2007

**Gartner**  
Web Innovation  
Summit 2007

**Gartner**  
Open Source  
Summit 2007

More than ever, organizations need to keep up on how to ...

**Collaborate in new and better ways**

**Use Web technologies that enable high performance**

**Overcome the risks and maximize the benefits of Open Source**

Mark your calendar now.

**Gartner has co-located 3 Summits this Fall that focus on the technologies, best practices and management concerns in the high-performance workplace in order to foster innovation and collaboration so today's employees can create value.**

Together the Portals, Content and Collaboration Summit, Web Innovation Summit and Open Source Summit will prepare you to capitalize on the opportunities ahead and optimize business results. It's your choice: Attend all three Summits. Or the Summit that best matches your needs. Make sure your team attends and is prepared for the exciting changes ahead – forward these dates to them now.

#### **Portals, Content & Collaboration Summit, September 17-19**

Picking up where we left off in Orlando, this Summit is all about working together effectively – among your own employees and with external business partners. Four brand-new tracks will cover business applications, execution and best practices, vendors and markets, technologies and architecture. With over 30 sessions, you'll learn how to:

- Build, implement and manage portals now – and in the next five years
- Leverage social networking for collaboration
- Overcome the challenges of Enterprise Content Management
- Understand the consumerization of IT and emergence of user participation – and the impact on your enterprise
- Make decisions about the new wave of collaboration technologies and products
- Organize for successful collaboration and user adoption

#### **Web Innovation Summit, September 19-21**

You need a proactive approach to best use the next-generation of Web technologies, methodologies and vendors. Three tracks and 20 sessions will illuminate your risks and opportunities as the Web becomes the primary user interface mechanism for both infrastructure and applications. You'll learn how to:

- Leverage Web 2.0 and associated technologies – like AJAX, RIA and Rails
- Understand the business implications of the new Web technologies and the resulting social changes
- Grasp the current and future impact of social networking in your enterprise
- Take advantage of emerging Web trends
- Make the case for and measure the ROI of new Web technologies
- Determine which strategies to adopt for Web services, SOA and SaaS
- Make smart decisions about Web technology products and vendors

#### **Open Source Summit, September 19-21**

Open Source is here to stay. The question now is how can you overcome the licensing and IP challenges, adapt Open Source to the enterprise and reap the full benefits of cost savings and speed of development. In two tracks and 15 sessions, you'll get answers to your questions and learn where Open Source is going. Learn how to:

- Get up-to-date on the latest in Open Source community development and products
- Know which Open Source technologies are available and when to use them
- Ensure effective, manageable adoption of Open Source
- Identify and mitigate the risks – technical, legal and organizational



For the latest updates, be sure to visit [gartner.com/us/pccwebos](http://gartner.com/us/pccwebos)

**Save BIG When You Register Now for All 3 Summits:  
Call 1 800 778 1997 for details on the discount.**