

# What if...



you could define the  
customer experience  
in a way that no one  
has before?

## \$200 Early Bird Discount!

Register by July 18, 2008.

## Gartner & 1to1 Media Customer Awards

*Details inside.*

### Keynotes



Chip Conley  
CEO, Joie de Vivre  
Hospitality



Daniel Gilbert  
Best-selling author  
& Harvard professor



Martha Rogers  
Founding Partner,  
Peppers & Rogers  
Group



Edmund Thompson  
VP, Distinguished  
Analyst, Gartner  
Group



## What would you do starting right now?

Get ready to question what you know about CRM. Fresh ideas, disruptive innovations, and emerging trends like social networking are changing the expectations of customers and their relationships with the companies they buy from.

Your options? Get lost in the diversity and complexity of today's business and IT landscape. Or gain a competitive advantage at **Gartner Customer Relationship Management Summit 2008.**

From embedding analytics into business processes to building relationships in virtual communities, CRM Summit 2008 will deliver unbiased, leading-edge insights for revolutionizing your marketing, sales and customer service strategies and exploiting today's key CRM technologies.

See how to deliver more valuable customer experiences. Leverage best practices for Web 2.0, e-commerce and more. Learn how to evaluate key vendors and differentiate between them. And leave energized, enlightened and empowered.

## Benefits of Attending

Get insight on the hot topics that business and IT executives care about most:

- **Creation and measurement of critical business processes** in marketing, sales and service
- **Emerging capabilities and best practices in the contact center, field and e-commerce channels**
- **Collection, management and use of customer data**
- **Impact of on-demand and outsourcing** on the provision of IT solutions
- **Disruptive innovations** that enterprises need to start planning for now
- **Opportunities to discuss best practices and network** with Gartner analysts and guest speakers, peers, and executives from the most important technology providers in the CRM space

## Who Should Attend

- **CEOs**
- **Chief Customer Officers**
- **CIOs and Technology Strategists**
- **CRM Project Managers**
- **CMOs**
- **Sales Executives**
- **VPs of Service**
- **Contact Center and Web Channel Managers**
- **Business Analysts**
- **Chief Innovation Officers**
- **Investors, Consultants and Technology Providers**

## Gartner Gives You All This at One Event...

- **NEW! Pre-Conference Networking User Roundtables:** Get answers to your most challenging CRM questions during these free networking sessions with peers, industry practitioners and Gartner analysts.
- **Tutorials:** Participate in any of five free pre-conference tutorials, from the building blocks of an E-CRM solution to world-class governance.
- **CRM Workshop Series:** Pre-conference paid workshops. A deep dive into the topics most important to successful CRM implementations.
- **Analyst One-on-One Sessions:** Sit down privately for 30 minutes with a Gartner analyst and get advice on any issue you choose.
- **Power Breakfasts:** Start your day off right — get the viewpoints of Gartner analysts, other CRM experts and innovative CRM vendors on future trends and opportunities.
- **AURs:** Small group discussions moderated by Gartner analysts. New insights guaranteed!
- **Solution Provider Sessions & Case Studies:** Leading providers share best practices, strategy and offerings. End users share "lessons learned" from real implementations.
- **Solution Provider Showcase:** Discuss challenges one on one with company reps. A great opportunity to focus on product comparisons.
- **Hospitality Suites:** An ideal forum for informal networking. Great food, drink and entertainment courtesy of our sponsors.
- **Innovative Vendors Session:** See some of the most innovative but "under-the-reader" CRM vendors in the market.

### Plus...

- 25 Gartner Analysts
- 60+ Sessions — 6 Conference Tracks, 2 Virtual Tracks
- Keynote Addresses on CRM from Provocative Thought Leaders
- Gartner & 1to1 Media Customer Awards
- Facilitated Peer-to-Peer Networking

## See the best of the best in CRM. Vote to select the User's Choice winner!



Gartner and 1to1 Media have joined forces on a unique awards program to highlight companies making a big impact with their customer relationship strategies and achieving unrivaled excellence in delivering the customer experience.

During a special keynote presentation, we'll be honoring winners in the following categories:

- Customer Strategy
- Enterprise CRM Optimization
- Marketing Optimization
- New Media Optimization
- Organizational Transformation
- Sales Optimization
- Service Optimization

We'll also announce the three finalists for the User's Choice Award, presented for excellence in delivering outstanding customer experiences. During the Summit, you'll be able to hear each of the finalists present their cases. Be sure to cast your vote to choose the 2008 User's Choice winner!



# What if...

you could cover every essential CRM topic in 3 days?

## Track Descriptions

Every customer interaction has the power to make or break a hard-earned relationship. The Gartner Customer Relationship Management Summit 2008 can help you align your business strategies and IT initiatives to deliver the kind of experiences that create more loyal and profitable customers. We'll guide you through the most complex and popular CRM initiatives — and challenge some widely held beliefs about CRM along the way.

### A

#### Business Strategy

Meet the elevated expectations of customers by evolving your business strategy. We'll delve into best practices from the industries leading the evolution of CRM and examine how they manage the customer relationship, from customer understanding to process management.

### B

#### Marketing — Orchestrating the Customer Experience

Explore marketing's evolving role in providing CRM thought leadership, its power in managing the company brand and shaping the overall customer experience, and the technologies marketers will use to support an enterprisewide, multichannel CRM strategy.

### C

#### Sales Sets the Stage for Beneficial Customer Experiences

In its pursuit of revenue targets, sales often acts in ways that run counter to corporate strategies for improving customer experiences. This track analyzes key sales constituencies and applications that can help mobilize sales for customer experience initiatives.

### D

#### Customer Service — Delivering the Intended Experience

How will customer service strategies evolve with changing consumer trends such as social networking? What will be the role and scope of the intelligent multichannel contact center? What will Web self-service look like over the next five years? Get both top-level and drill-down insights.

### E

#### CRM Technologies that Will Create a Differentiated Customer Experience

CRM application architectures. On-demand. Customer data integration. Master data management. Dive into the technologies behind the most successful CRM initiatives and create a competitive advantage.

### F

#### Vendors and Markets

Engage in deeper discussions with the vendors shaping organizational use of technology for CRM. Focusing on particular components of the CRM market, we'll define key vendors you should consider as well as important evaluation criteria and differentiators.

#### + Virtual Tracks

### G

#### Analytics

A latecomer to CRM strategy, analytics now plays a vital role in driving the customer experience. We'll cover performance management, predictive analytics and much more.

### H

#### Web and E-Commerce

See how to improve your online customer experience strategy by leveraging new Web 2.0 social capabilities, business models and technology trends.

## Keynote Guests

### Chip Conley, CEO, Joie de Vivre Hospitality



#### Peak — How Great Companies Get Their Mojo from Maslow

Monday, September 8, 5:15 – 6:15 pm

Chip Conley is the founder and CEO of Joie de Vivre Hospitality, California's largest independent hotel company — and America's second largest boutique hotelier. Today, the company has 40 award-winning hotels, each with an original theme, personality and

unique collection of services and amenities. *USA Today* has called it "the most delightfully schizophrenic collection of hotels in America."

In his recent bestselling book, *Peak: How Great Companies Get Their Mojo from Maslow*, he illustrates how to create peak experiences for employees, customers and investors, a prescription that he credits for helping Joie de Vivre overcome a dramatic economic downturn to triple its annual revenues between 2001 and 2008.

### Daniel Gilbert, College Professor of Psychology at Harvard University



#### Stumbling on Happiness

Tuesday, September 9, 8:00 – 9:00 am

According to *The Wall Street Journal*, Daniel Gilbert is "a leader in the study of affective forecasting," or how people predict their emotional reactions to future events. He is the author of the 2006 national bestseller, *Stumbling*

*on Happiness*, which has been published in 21 countries and received rave reviews.

Daniel's groundbreaking research on how people try—and fail—to predict their own satisfactions has had dramatic implications for strategy, sales and marketing, and for understanding customers.

He is the Harvard College Professor of Psychology at Harvard University, a prestigious chair bestowed in recognition of his superb teaching.

### Martha Rogers, Founding Partner, Peppers & Rogers Group



#### Breaking the Rules: What Empowered Customers Mean to the Future of Your Business

Tuesday, September 9, 5:15 – 6:15 pm

*Business 2.0* magazine named Martha Rogers, Ph.D., one of the nineteen most important business gurus of the past century. The World Technology Network named her as "an innovator most likely to create visionary ripple effects."

Recognized for the past decade as one of the world's leading experts on customer-based business strategies and growing customer value, Dr. Rogers is a founding partner of Peppers & Rogers Group. She has authored eight best-selling business books with Don Peppers, including *Return on Customer* and *The One on One Future*, which is widely acknowledged as the bible of the customer strategy revolution. Their latest book is *Rules to Break & Laws to Follow*.

### Edmund Thompson, VP, Distinguished Analyst, Gartner



#### Improving the Customer Experience

Monday, September 8, 8:15 – 9:15 am

Prior to joining Gartner, Mr. Thompson worked for Weyerhaeuser, where he was responsible for formulating strategies to improve the

company's software engineering, application integration and business-to-business integration activities. Mr. Thompson has more than 30 years of experience in the IT industry.

His research is focused on three areas: application infrastructure vendors and technologies, best practices, and strategies that can be effectively pursued once technologies and best practices are in place.



## Meet the Gartner Analysts

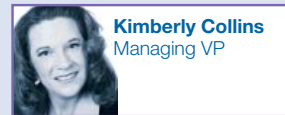
For over 25 years, Gartner analysts have been the trusted advisors to many of the world's largest and most demanding organizations. Gartner analysts draw constantly from the real-life challenges and solutions experienced by more than 45,000 clients worldwide.

### Summit Chair



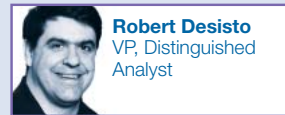
**Gareth Herschel**  
Research Director

Focus Areas: Customer Relationship Management, Business Intelligence



**Kimberly Collins**  
Managing VP

Focus Areas: Customer Relationship Management



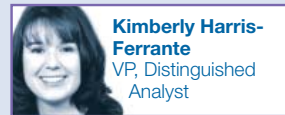
**Robert Desisto**  
VP, Distinguished Analyst

Focus Areas: Customer Relationship Management, ERP & Supply Chain Management



**Bill Gassman**  
Research Director

Focus Areas: Business Intelligence, Business Activity Monitoring, Web Analytics



**Kimberly Harris-Ferrante**  
VP, Distinguished Analyst

Focus Areas: **Insurance**

### Analysts



**Gene Alvarez**  
Research VP

Focus Areas: Customer Relationship Management



**Gale Daikoku**  
Research Director

Focus Areas: **Retail**



**Michael Dunne**  
Research VP

Focus Areas: Customer Relationship Management



**Matthew Goldman**  
Research VP

Focus Areas: Outsourcing & IT Services



**Johan Jacobs**  
Research Director

Focus Areas: Enterprise Resource Planning (ERP), Customer Relationship Management



**Stessa Cohen**  
Research Director

Focus Areas: **Banking**



**Jim Davies**  
Research Director

Focus Areas: Customer Service and Support, Contact Center Workforce Optimization, Enterprise Feedback Management, Customer Experience Management



**Andrew Frank**  
Research VP

Focus Areas: **Media**



**Dale Hagemeyer**  
Research VP

Focus Areas: **Manufacturing**



**Isher Kaila**  
Research Director

Focus Areas: Global Customer Relationship Management, End-to-End Business Process Management

### Analysts (continued)



**John Kost**  
GVP

Focus Areas: **Government**



**Susan Landry**  
VP, Distinguished Analyst

Focus Areas: Application Development & Integration



**Michael Maoz**  
VP, Distinguished Analyst

Focus Areas: Social Networking Adopted to CRM, Customer Service Strategies, Contact Center CRM Applications, Customer-Centric Business Processes



**Sharon Mertz**  
Research Director

Focus Areas: Customer Relationship Management, Software Markets



**Scott Nelson**  
Managing VP

Focus Areas: Customer Relationship Management, Software Markets



**John Radcliffe**  
Research VP

Focus Areas: Customer Relationship Management



**Adam Sarner**  
Principal Research Analyst

Focus Areas: Customer Relationship Management



**Michael Smith**  
Research VP

Focus Areas: IT Management



**Bill Snyder**  
Research VP

Focus Areas: IT Asset Management



**Edmund Thompson**  
VP, Distinguished Analyst

Focus Areas: Customer Experience, CRM Strategy and Implementation, Enterprise Feedback

### Analyst User Roundtables

Small group discussions moderated by Gartner analysts — gain new insights into your strategies and tactics!

### Go one-on-one with Gartner.

#### Reserve your Analyst One-on-One Session.

Sit down privately for 30 minutes with a Gartner analyst and get personalized advice on any concern, issue or problem you choose. Reservations will be accepted 30 days prior to the start of the conference. Email confirmations will be sent to attendees a week prior to the start. Attendees may also make reservations onsite at the One-on-One Reservation Desk. Reserve your session early — these sell-out quickly.



# What if...

you could learn the secrets of CRM success from industry leaders?

## Agenda at a Glance

Experience a unique mix of Gartner analyst presentations, guest keynotes, real-life case studies, interactive panels and solution provider sessions. It all adds up to one cutting-edge program agenda.

### Sunday, September 7

- 2:00 pm Pre-registration
- 2:00 pm Paid Workshop
- 2:45 pm Tutorials (T1+T2)
- 4:00 pm Tutorials (T3-T5)
- 5:00 pm Networking User Roundtables (N1)

### Monday, September 8

- 7:00 am Breakfast
- 7:15 am Registration
- 8:00 am Welcome and Introduction (K1a)
- 8:15 am Keynote Address (K1b)
- 9:15 am 2008 Customer Awards (K2)
- 10:30 am Track Sessions (A1-F1)
- 11:45 am Track Sessions (A2-F2)
- 12:45 pm Attendee Luncheon & Solution Showcase Dessert Reception
- 2:45 pm Solution Provider Sessions & Case Studies (SPS1)
- 4:00 pm Track Sessions (A3-F3)
- 5:15 pm Keynote Address (K2)
- 6:15 pm Solution Showcase Reception

### Tuesday, 9

- 7:00 am General Breakfast and Power Breakfast (PB1+PB2)
- 7:15 am Registration
- 8:00 am Keynote Address (K3)
- 9:15 am Track Sessions (A4-F4)
- 10:30 am Solution Provider Sessions & Case Studies (SPS2)
- 11:30 am Attendee Luncheon & Solution Showcase
- 1:30 pm Solution Provider Sessions & Case Studies (SPS3)
- 2:45 pm Track Sessions (A5-F5)
- 4:00 pm Track Sessions (A6-F6)
- 5:15 pm User's Choice Awards Presentation (K4a)
- 6:15 pm Hospitality Suites

### Wednesday, September 10

- 7:00 am General Breakfast and Power Breakfast (PB3+PB4)
- 8:00 am Track Sessions (A7-D7)
- 9:15 am Solution Provider Sessions (SPS4)
- 10:00 am Track Sessions (A8,C8,D8,E8)
- 11:15 am Closing Keynote (K5)

## BUILD YOUR OWN CUSTOMIZED AGENDA ONLINE.

Use our convenient Agenda Builder tool to create your own personalized Summit schedule before the event. Go to [gartner.com/us/crm](http://gartner.com/us/crm)

## Session Descriptions

### Keynotes

#### K1a. Welcome & Opening Remarks

**Gareth Herschel, Research Director**

#### K1b. Opening Keynote: Improving the Customer Experience

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. The subject rates highly in the minds of senior business executives in many industries. This keynote will examine the theory behind customer experience management, outline the strategies and implementation approaches of leading organizations, and provide insight on where to start.

**Ed Thompson, VP, Distinguished Analyst**

#### K2. 2008 Customer Awards & User's Choice Award Finalist

Gartner and 1to1 Media have joined forces on a unique awards program that will highlight companies that are making a big impact through their customer relationship strategy and are achieving an unrivaled level of excellence in delivering the customer experience. Join us at this session to hear the three User's Choice Award finalists present their cases, and don't miss out on the opportunity to be an active participant in choosing the 2008 winner.

**Adam Sarner, Principal Research Analyst and Ginger Conlon, 1to1 Magazine editor-in-chief**

#### K2. Peak – How Great Companies Get Their Mojo from Maslow

After a successful climb to the pinnacle of the hospitality industry, Chip Conley, founder of Joie de Vivre Hospitality, was rocked to his foundation by a dramatic economic downturn in the post-dot-com, post-9/11 economy. This desperate situation made Conley reaffirm his belief in psychologist Abraham Maslow's iconic concept of the Hierarchy of Needs and theory of human motivation to help his business flourish once more. Conley reveals the miracle of human potential and shows what can happen when employees live up to their full potential, customers are transformed, and investors are fulfilled by leveraging the potential of their capital.

**Chip Conley, Founder and CEO of Joie de Vivre Hospitality**

#### K3. Stumbling on Happiness

Most of us spend our lives steering ourselves toward the best of all possible futures, only to find that tomorrow rarely turns out as we had presumed. As Harvard psychologist Daniel Gilbert explains, when people try to imagine what the future will hold, they make some basic and consistent mistakes. Just as memory plays tricks on us when we try to look back, so does imagination when we try to look forward. Gilbert will persuade us to accept that happiness is not what or where we thought it was.

**Dan Gilbert, Professor, Harvard University**

#### K4a. Gartner and 1to1 Media – User's Choice Presentation

Join Gartner and 1to1 Media as we acknowledge the Customer Award winners and present the 2008 User's Choice Award winner for excellence in delivering the customer experience.

**Adam Sarner, Principal Research Analyst and Ginger Conlon, 1to1 magazine editor-in-chief**

#### K4b. Breaking the Rules: What Empowered Customers Mean to the Future of Your Business

When customers can share their experiences electronically with millions, the customer experience — not advertising, promotion or products — rules. Trust becomes a business necessity and a divining rod for any company's long-term success. You have to know how to harness the power of your connected customers and networked employees to create customer experiences that drive value and lock in loyalty.

In this keynote, Martha Rogers, Ph.D., presents innovative and strategic thinking about what empowered customers, networked employees and a culture of innovation and trust mean for the competitive differentiation and long-term viability of your business.

**Martha Rogers, Founding Partner, Peppers & Rogers Group**

#### K5. Gartner Closing Keynote

This session will highlight the most important themes and concepts raised during the conference, summarize the key action items and recommendations, and will conclude with a panel of analysts to answer any and all remaining questions from attendees.



## Session Descriptions

### Power Breakfast

#### PB1. Intelligent Decision Management: Driving Relationships in Real Time

Real-time cross-selling of customers during a call is an increasingly common technique for organizations, but what is the full potential and what are the pitfalls to avoid when deploying it? This session will cover the analytical (are self-learning algorithms hype or help?), business strategy (why do you need Senior Management sponsorship — it isn't for the budget) and business process issues (why can't you trust the results you capture?) associated with adopting this powerful concept.

- What is the business value of Intelligent Decision Management?
- What factors are required for adoption to be successful?
- What are the criteria when selecting a vendor and how are the vendors seeking to differentiate themselves?

**Gareth Hershel, Research Director** 

#### PB2. Price Optimization and Management: Essential Applications for an Uncertain Economy

Defining and defending optimal prices in target markets is an imperative for enterprises responsible for producing returns for stakeholders. However, traditional approaches to pricing are being viewed as inadequate, especially as uncertainty grows over the business climate. A distinct application market has emerged that is rapidly acquiring visibility with enterprises willing to invest in IT and concerned with systematically improving pricing strategies and practices to increase margins and sales.

- What factors will drive interest in price optimization and management?
- How will technology aid an organization's ability to optimize and manage pricing?
- How will the price optimization and management market evolve?

**Michael Dunne, Research VP**

#### PB3. Innovative Vendor Demonstration Session

Every year Gartner identifies "Cool Vendors," emerging suppliers of innovative capabilities too small for most companies to be aware of them. This session will provide attendees the opportunity to see some of the most innovative but "under-the-radar" vendors in the market and to judge which will receive the award of Most Innovative Vendor for delivering the next generation of customer experiences.

#### PB4. CRM Market Outlook for Investors— Trends and Disruptors through 2009

This presentation will focus on critical CRM market forces and disruptors, and will highlight the vendors best positioned to benefit or lose from these over the next 18 months. The session is targeted at investors, buyers or vendors seeking a performance perspective on the CRM market, key players, and high-growth areas. Major technology trends, shifting buyer consumption patterns, and the contribution of emerging regions on performance will be explored in the context of major market vendors. The session concludes with recommendations and a discussion of what and who to watch through 2009.

**Sharon Mertz, Research Director**

## Session Descriptions

### Tutorials

#### T1. Is it Time for a Website Upgrade?

Your organization's website is the primary starting point for building many customer relationships, but the technologies involved are changing more quickly here than almost any other part of the technology landscape. This tutorial session will outline the building blocks of an E-CRM solution.

**Gene Alvarez, Research VP**

#### T2. The 8 Building Blocks of CRM

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.

- 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?

**Scott Nelson**

#### T3. "Getting" Gartner: Understanding Gartner's Methodologies & Charts

Gartner produces a large amount of research in many formats and often organizations need to know two things to maximize the use of Gartner research for their organizations: strategies and tactics. Attendees to this session will gain an in-depth understanding of:

- How are Gartner's Research Methodologies used to create research?
- Using Gartner charts and diagrams for your organization?
- What is a day in the life of a research analyst?

**Gene Alvarez, Research VP**

#### T4. Getting "Gartnered": How Vendors Can Work with Gartner

What are the best practices for vendors to engage with Gartner analysts? Whether you are multitasking analyst briefings at a new start-up, or an experienced analyst relations professional, come to this session to understand how best to leverage the value of your relationship with Gartner.

**Gareth Herschel, Research Director and  
Matt Goldman, Research VP**

#### T5. World-Class Application Governance and Management

Organizations innovate and invest in CRM because that's where competitive differentiation happens. So these applications are among the earliest to be impacted by evolving trends such as SOA, Web 2.0, and agile development methods. Success demands advanced application governance and management disciplines. Even the best of current practices won't be sufficient. This session describes what you'll need, how to assess current capabilities, and approaches and tools you'll want to factor into your priorities and plans.

- What application governance and management disciplines will be required?
- How do you assess your organization's capabilities and prioritize steps for advancement?
- What approaches and tools help deliver the best mix of business capability, speed and quality?

**Sue Landry, VP, Distinguished Analyst**

Virtual Track KEY:  = Web/E-Commerce  = Analytics

"Best, most comprehensive  
CRM conference for marketers.  
If you can only attend one,  
this is it."

— R. Ross,  
Director Marketing Communications,  
Moen Incorporated



# What if...

your CRM strategy put you in the forefront of today's top trends?

## Session Descriptions

### Track A – Business Strategy

#### A1. The Right Way to Get CRM Strategy Done Right

Gartner defines CRM as a business strategy, where outcomes optimize values such as profitability, revenue and customer satisfaction by organizing around customer segments, fostering customer-satisfying behaviors, and implementing customer-centric processes. However, there are many other equally valid definitions and the goals and execution vary from industry to industry and from one customer type to another. This presentation explores the lessons to be learned from different styles of CRM strategy and implementation.

**Scott Nelson, Managing VP**

#### A2. You Don't Need Customer Relationship Strategies to Be Customer-Focused

Banks can give up the search for a miracle relationship strategy for every customer. Customers want access, the ability to pick and choose products and services, and answers to their questions and problems.

- How can banks grow revenue and develop relationships if they are not at the right place at the right time?
- How is the banking business environment changing?
- What impact do these changes have on customers and customer relationship strategies?
- What business strategies should banks pursue to facilitate customer-focused relationships?
- What technology strategies can banks employ to offer customers the relationship they want?

**Stessa Cohen, Research Director**

#### A3. Cool Ways to Shop: The Retail Store of 2012

Despite advances, technology has not radically changed the way we shop. Is this a failure of the technology or a lack of consumer adoption? Enter the generation of digital natives – consumers who are growing up in a Web 2.0+ world, who will transform how we shop. This presentation will highlight shopping technologies in labs and pilots today that may become as common as the cash register in the future.

- How will B2C interaction models change?
- What are the technology and social trends that will significantly impact consumer industries?
- How will consumer adoption of advanced technologies change?

**Gale Daikoku, Research Director** 

#### A4. Multichannel Integration: Fulfilling Customer Needs and Protecting the Brand

Increasing customer satisfaction and brand loyalty, and meeting regulatory requirements, require integration across multiple customer interaction channels. This presentation gives a detailed overview of multichannel integration strategies, principles, and distribution technologies as used successfully in the insurance industry and applicable to many other sectors.

- What are the key elements of integrated, intelligent channel architecture?
- How should insurers invest in integrating their channels and improving transaction processes?
- How can multichannel integration support cross-channel interaction and provide different information through each channel?

**Kimberly Harris-Ferrante, VP, Distinguished Analyst**

### Track A – Business Strategy (continued)

#### A5. Driving Citizen Satisfaction with Public Sector CRM or Government Customer Service and CRM

Government agencies are under increasing pressure to improve the quality of constituent interactions while also managing increasing volumes of interactions with existing or shrinking resources. To address these demands, agencies need to transform customer service capabilities and integrate constituent management processes to improve employee productivity, close budget gaps, drive improved outcomes, and gain better insight into agency performance. More and more, citizens and businesses are demanding convenient, one-stop access to benefits and services, consistent information across any communication channels, and easy-to-follow instructions and procedures.

**John Kost, GVP**

#### A6. The Impact of Social Trends on the Future of CRM

Large societal trends have huge impacts on enterprises around the world, and on their CRM strategies. The problem? Most firms wait until the trends have overwhelmed them before they try to react. And when IT is added to the mix, this slowness to respond can cost firms incredibly large sums of money, and may drive them out of business.

- What are some of the societal trends that will impact enterprises?
- What is the impact on enterprises, and what is the risk in waiting?
- What should firms be doing now to take advantage of them?

**Scott Nelson, Managing VP**

#### A7. 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.

- How can metrics play be leveraged for ensuring CRM success?
- How can enterprises identify and apply the right metrics for CRM success?

**Michael Smith, Research VP** 

#### A8. Employing Business Intelligence about and within Your Business Processes

Business Intelligence can enhance business process management by providing continual business activity monitoring as well as delivering historical, current and predictive information at decision points within a process. While there is much to gain, deployment of these solutions has been limited to early adopters.

- Why are BI, BAM and BPM technologies converging?
- How can BI technologies improve business processes?
- Which tactics help to successfully link BI and BAM with BPM?

**Bill Gassman, Research Director** 

“Insightful presentations delivered by dynamic speakers who truly know about CRM as a practice and as a form of technology.”

— R. Higgs,  
Senior Manager Marketing, BSQUARE

Virtual Track KEY:  = Web/E-Commerce  = Analytics



## Session Descriptions

### Track B – Marketing

#### B1. Beyond the Enterprise: Exploiting the Marketing Ecosystem for Competitive Advantage

Marketing is a complex ecosystem of people working across the enterprise and with external partners. Through improved collaboration, marketing can improve ROI and drive a competitive advantage for the organization. Two sets of macromarketing processes, those focused on customer communications and those focused on marketing operations, help companies exploit this marketing ecosystem.

- What will be the top 10 marketing processes for companies from 2008 to 2013?
- What marketing processes will drive revenue through enhanced customer communications?
- What marketing processes will increase marketing ROI by improving operational efficiency?
- What technologies will help companies exploit this marketing ecosystem for competitive advantage?

**Kim Collins, Managing VP**

“It gave me building blocks  
in various CRM areas to  
take back to my company  
and better solidify our  
CRM efforts.”

— T. Timm,  
Research Analyst, GEICO

#### B2. The New Face of Multichannel Campaign Management

Multichannel campaign management will be the key to customer interaction for acquiring, retaining and improving customer relationships. Companies will increase customer profitability and revenue by understanding what customers will want and when. Contextual marketing, addressable branding, community marketing and transactional marketing will uncover and deliver relevancy in “customer-aware” channels to create competitive advantage.

- What are the opportunities for organizations utilizing the customer-aware multichannel potential of campaign management?
- How will organizations start incorporating multiple channels within campaign management?
- Which technologies and vendors will be best suited to support present and future channels?

**Adam Sarner, Principal Research Analyst** 

#### B3. Gartner and 1to1 Customer Award Winner Case Study: Marketing Optimization

Learn how this Gartner & 1to1 Customer Award Winner has optimized marketing efforts to set themselves apart from their competition. Award winners will be announced after June 30, 2008.

Visit [gartner.com/us/crm](http://gartner.com/us/crm) for detail

### Track B – Marketing (continued)

#### B4. Improving Brand Management and Marketing Performance with MRM

The creative side of marketing has been left relatively unautomated with little understood about the performance and ROI of advertising activities. Retaining central control of the brand while providing capabilities for localization has been practically impossible for marketing departments. Waste from marketing content production and fulfillment have caused marketing to overspend and destroy ROI. In this presentation, we illustrate how marketing resource management (MRM) supports brand management and helps marketing improve its ROI.

- What MRM competencies improve brand management and enable superior allocation of resources?
- How do you determine your MRM focus and select technologies?

**Kim Collins, Managing VP**

#### B5. Generation Virtual: How a 40th-Level Half-Elf from Secaucus, New Jersey Will Change Your Business

While traditional wisdom has focused on customer identification for one-to-one targeted marketing campaigns, in five years multiple anonymous personae, blogs, and online communities will give every customer an alter ego driving your relationship with them. Customers will have artificially intelligent personabots seeking out their needs and wants 24/7. This presentation introduces these threats to your organization’s relationship with customers and presents the critical steps you should take today.

- How will the virtual environment of tomorrow look?
- How will companies relate to anonymous virtual personae in a virtual world?
- How will technology adapt to give rise to the all-powerful personabot?

**Adam Sarner, Principal Research Analyst** 

#### B6. Forging New Relationships with Active Viral Content

The Web today is a collection of services that deliver content across a myriad of contexts. Marketers are faced with complex choices in digital marketing. This session looks at innovations to restore unfettered content by making it trackable and capable of initiating dynamic advertising opportunities. Digital Rights Management platforms enable new business models for publishers and advertisers based on open distribution and could change the nature of content on the Web.

- What are the new realities of advertising in Web 2.0?
- How can advertisers maximize targeting of Web 2.0?
- How can marketers best prepare for future scenarios?

**Andrew Frank, Research VP** 

#### B7. Socialization of IT: Choosing the Right Technologies to Facilitate the Customer Relationship

Many customers go through similar buying processes when making purchases. Mass adoption of the Web channel has shifted a typical buying process of need/want recognition, information search, evaluation and purchase to an increasingly online activity. Within each stage of the buying process, community enablement technologies can improve the customer experience and influence the customer through all stages toward a purchase.

- What are the drivers fueling the growth of the socialization of IT?
- How can enterprises develop customer relationships by deploying engagement technologies to fit the business purpose?
- How will technology change to support socialization of IT?

**Adam Sarner, Principal Research Analyst** 

Virtual Track KEY:  = Web/E-Commerce  = Analytics



# What if...

you had a sales force automation solution that benefitted customers as well as salespeople?

## Session Descriptions

### Track C – Sales

#### C1. Maximizing Value from Sales Force Automation

Selling organizations have tried for years to leverage technology to increase revenue with mixed results. This presentation unlocks some of the concepts for achieving success with sales force automation to improve current or future sales technology deployments. Tactical advice includes prioritizing applications, vendor evaluation frameworks and deployment best practices. Strategic advice provides guidance on which technologies and architectures will be key to increasing sales performance.

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

**Robert DeSisto, VP, Distinguished Analyst**

#### C2. Gartner and 1to1 Customer Award Winner Case Study: Sales Optimization

What are the business drivers and challenges for sales optimization? Discover how this Gartner & 1to1 Customer Award Winner succeeded in optimizing sales efforts using innovative strategies. Award winners will be announced after June 30, 2008.

Visit [gartner.com/us/crm](http://gartner.com/us/crm) for details

#### C3. Sales from the Customer's Perspective: What Process Experiences Are Preferred – Can Sales Automation Help?

Sales automation initiatives usually focus on increasing productivity or improving oversight, while customer experiences are overlooked. Improving customer experiences in sales cycles will bolster company perceptions, increase attractiveness to prospects, build customer loyalty and encourage recurring business. This presentation will explore automation in improving processes for customers to do business with sales organizations, and enabling companies to acquire differentiation and competitive advantages.



- Why will customer experiences within B2B sales cycles have to be addressed?
- How will technology impact efforts to improve sales process experiences?
- How will the sales automation market evolve to deliver solutions promoting favorable customer experiences?

**Michael Dunne, Research VP**

#### C4. Web Channel Analytics: Expectations and Best Practices

Just buying tools or services is never enough. Making good decisions about a company's online channel and maximizing its business value requires technology, dedicated people and disciplined processes. Why do some organizations succeed while others fail? This presentation explains different stages of maturity and best practices for improving the engagement of Web visitors, and provides tips on selecting the right tools to improve an organization's website.

- What should organizations expect from Web analytics technology?
- Which best practices are important to improve the online channel business performance?
- How should an organization select Web analytics technology?

**Bill Gassman, Research Director**  

### Track C – Sales (continued)

#### C5. Focus on Pharmaceuticals: Showcase for Multichannel and Analytical Capabilities in Data-Rich Industries

Physicians must stay informed on therapies but time constraints require that they gather information from multiple sources. Having "one view of the customer" is critical in pharmaceuticals because physicians drive rather than actually make purchases. The resulting business processes demonstrate how multichannel delivery and advanced analytics are key in understanding and meeting physician needs.

- What selling capabilities exist and how are they changing the game?
- What types of analytical capabilities are used to better understand physicians?
- How is the role of sales rep changing, and what does it mean to be a "concierge" rather than an "influencer"?

**Dale Hagemeyer, Research VP**

#### C6. Breaking the Code: Sales Force Automation Salespeople Want

Few salespeople like their sales force automation solution. Many have lowered their expectations to just having a system to enter data. It does not have to be this way. With the right approach you can provide value to your salespeople. Our presentation breaks the code on how to deliver an SFA solution they will actually want to use.

- What will be the business drivers and challenges for delivering sales force automation value through 2011?
- What will salespeople value in their sales automation deployments?
- How will organizations deliver tangible sales force automation value to salespeople?

**Robert DeSisto, VP, Distinguished Analyst**

#### C7. Focus on Consumer Goods: How They Are Using Technology for Competitive Advantage and What Other Industries Can Learn from Them

Consumer goods companies are unique in that their selling model is through retailers en route to consumers. This requires understanding retailers as well consumers in unique ways.

- How have customer-facing capabilities evolved and which unique data sets can be harnessed to improve outcomes?
- How are consumers more powerful and informed than ever before and what does this mean for consumer goods companies?
- What are the dividends being achieved by manufacturers that get it right?

**Dale Hagemeyer, Research VP**

#### C8. Sales Automation from the Manager's Eyes: Striving for an Agile, High-Performance Sales Force

Sales automation is denigrated as a tool for management to look over the shoulders of sales. In reality, sales leadership has fairly circumscribed visibility into markets, and less capacity to affect changes. This session analyzes software segments promising to increase transparency into sales cycles and market trends, improve organization of sales, and enable greater agility in exploiting developments.

- What obstacles will hamper sales managers' efforts to boost sales performance?
- What software segments will capitalize on sales trends and better guide sales teams?
- How will software markets support managers' requirements for transparency, flexibility and influence in achieving goals?

**Michael Dunne, Research VP**

"Presentations with well-delivered frameworks for business problems and a fantastic opportunity to get forward-looking insight from analysts."

— P. Simpkinson,  
Public Relations Manager, Targus Info

Virtual Track KEY:  = Web/E-Commerce  = Analytics



## Session Descriptions

### Track D – Customer Service

#### D1. Modernizing the Contact Center to Support the Multichannel Customer

Businesses are expected to provide customers with convenient, fast, accurate and consistent interaction channels. Harmonizing processes and customer history will continue to pose a challenge as organizations add more outbound alerts and notifications, and support social networks. Customer service technologies take on the characteristics of Customer Interaction Hubs (CIH) that respond and anticipate customer issues and queries.

- How will the Customer Interaction Hub provide cost savings?
- How will the CIH improve customer satisfaction and profitability?
- Which technologies will be most important to creating the CIH?
- Who will be the technology providers best positioned to deliver value?

**Johan Jacobs, Research Director & Michael Maoz, VP, Distinguished Analyst**

#### D3. Customer Service Analytics: Adding Intelligence to the Service Experience

Analysis of customer service will have a profound impact on the delivery of service and the customer experience. Emerging technologies such as text and speech analytics, cross-channel view of the customer experience and analytical techniques such as segmentation, classification and affinity analysis will all impact the way that analysis is viewed within the service function.

- What are the different categories and what benefits can organizations expect from them?
- How should enterprises prioritize investments and ensure success with service analytics deployments?
- Which vendors should organizations look to for support with a service analytics initiative?

**Gareth Herschel, Research Director**

#### D4. From Overhead to Asset: Optimizing the Contact Center Workforce

Workforce optimization (WFO) is a common term within contact centers but few can claim to be optimized. It requires fine tuning agents' recruitment, training, scheduling, assessment and motivation. WFO software simplifies this challenge but best practices go beyond software. In this session we discuss the drivers, technologies and best practices that help contact centers become optimized.

- What benefits does WFO bring to the contact center?
- What best practices can be adopted across the many dimensions that shape an agent's existence?
- Which vendors can help with WFO initiatives and how will they evolve over the next 5 years?

**Jim Davies, Research Director**

### Track D – Customer Service (continued)

#### D5. How Social Networking Will Disrupt Customer Service Strategies

Customer retention strategies, as well as customer service agent retention strategies, will face increasing disruption as the new consumer/citizen/partner comes to expect greater power to collaborate in determining what defines great service from a business. Our session examines:

- The increased power of the customer and the social network communities
- Harnessing collaboration to become an intent-driven organization
- How organizations will drive proactive customer service processes and real-time solutions

**Michael Maoz, VP, Distinguished Analyst**

#### D6. Enterprise Feedback Management: The Who, When, Why, Where and What of Surveying

Few organizations take a holistic, multichannel, enterprisewide approach to surveying. Consequently, there is no overriding strategy for optimizing the critical questions of customer feedback management. In this presentation we look at all aspects of this from best practice survey design to data collection and analysis.

- What is enterprise feedback management (EFM) and how does it differ from other customer feedback mechanisms?
- What functional considerations and best practices should be considered during the selection and use of an EFM solution?
- Which vendors can help with EFM initiatives and what are the key dimensions that shape this market?

**Jim Davies, Research Director**

#### D7. Gartner and 1to1 Customer Award Winner Case Study: Customer Service Optimization

Join this Gartner & 1to1 Customer Award Winner as they share their best practices in customer service optimization. Award winners will be announced after June 30, 2008.

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#### D8. Web Self-Service: Meeting Customer Expectations

Customer self-service is an active area of technology innovation. Natural-language search, automated e-mail response, knowledge management in self-service and speech recognition in the call center are replacing labor-intensive interactions. Self-service automation is freeing time for service representatives to handle tasks that require personal attention. This presentation will focus on self-service solutions and the impacts of deploying them.

- What are the myths and realities around self-service?
- Where are business benefits to be gained when deploying self-service?
- What is the uptake of a self-service offering?
- Which vendors should you consider for self-service?

**Johan Jacobs, Research Director**

“A great way to find out the latest in the CRM industry while also getting tried and true best practices in building and implementing a CRM business case.”

— M. Facer,  
Sales Technology Manager,  
Republic Mortgage Insurance

Virtual Track KEY: = Web/E-Commerce = Analytics



# What if...

you fully embraced a future driven by innovative new CRM technologies?

## Session Descriptions

### Track E – Technology Strategy

#### E1. The Role of Technology in Improving the Customer Experience

Focusing on the customer experience requires more than creating storyboards and telling customer-facing employees to smile. There is a broad range of technologies to help improve and understand the customer experience. Determining which technologies to use and what processes to focus on requires an understanding and alignment of customer needs with organizational goals.

- How can operational CRM technologies impact the customer experience across sales, service and marketing?
- What is the role of emerging innovative technologies in enhancing the customer experience?
- How can customer processes be enhanced to improve the customer experience?

**Jim Davies, Research Director**

#### E2. The Revolution in CRM Architectures and Technology

CRM architectures, technology platforms and applications are undergoing seismic changes as they embrace SOA principles and BPM, model-driven approaches and offer alternative deployment options — on-premises or SaaS. This session explores those changes, scrutinizes the strategies and road maps of the key CRM vendors, and discusses how organizations should prepare themselves for this new world.

- How will CRM architectures, technology platforms and applications evolve?
- How will the vendors evolve their CRM applications to embrace new architectures and technologies?
- How and when can organizations take advantage of the new CRM architectures, technologies and applications?

**John Radcliffe, Research VP**

#### E3. Innovation and the Next Generation of CRM

The next generation of CRM is about co-innovation between businesses and customers to design, create and improve the interactions that will provide the most value for both. We provide insight and guidance on the emerging trends and applications.

- How will businesses anticipate and respond to new societal drivers?
- How will organizations choose the best software from best-of-breed vendors while limiting the risk, and avoid being locked in to an enterprise application suite?
- How will SaaS, Web 2.0, cloud computing, SOA and business intelligence make decisions more difficult?

**Ed Thompson, VP, Distinguished Analyst and Michael Maoz, VP, Distinguished Analyst**

#### E4. Software as a Service (SaaS): Changing the Way You Deliver Applications

On-premises software deployments are cursed with supporting heterogeneous operating systems, databases and applications. SaaS is of high interest, fed by the promise of lower cost of ownership by avoiding infrastructure maintenance and software upgrade cycles. However, challenges exist for this model, such as data security, customization, architecture, agility, scale and integration. In this presentation, we provide frameworks to determine the applicability of SaaS for delivering applications, analyzing business and technology drivers.

- What will be the business and technology drivers for adopting a SaaS Model?
- What's needed to develop a SaaS capability and how will this evolve?
- Which applications and vendors will emerge to best enable SaaS?

**Robert Desisto, VP, Distinguished Analyst**

### Track E – Technology Strategy (continued)

#### E5. Customer Data Integration (CDI) — Part of Your Master Data Management (MDM) Vision

Creating a “single view of the customer” is essential in customer-centric organizations. Opinions differ regarding what constitutes a single customer view, but organizations recognize that the most strategic approach is based upon data quality improvement and master data management (MDM). This presentation will help you create a strategic single view of the customer in a customer data integration (CDI) initiative.

- What are the drivers for CDI and MDM and who has successfully adopted them?
- What best practices will help you succeed with CDI and MDM?
- How will the MDM market evolve and which vendors will win?

**John Radcliffe, Research VP**

#### E6. 1,353 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 project managers face in their careers. From 2003 to 2007, Gartner studied over 1,300 CRM projects involving external service providers. This session will highlight the key trends and shifts affecting CRM implementations that we identified from those projects and will help you prepare for your next initiative.

- What are the key trends in CRM implementations?
- What are the best practices for evaluating and selecting an external service provider?
- Who can help you implement your CRM solution?

**Matt Goldman, Research VP**

#### E8. Using Business Process Management to Drive Customer Centricity

Most companies are organized by function or product and operational efficiencies have been achieved using this inside-out perspective. However, a customer-centric strategy requires an outside-in perspective — looking at your processes from your customer's perspective — to identify opportunities to improve the overall customer experience. This presentation explores how BPM can enable customer-centric strategies beyond classic CRM packaged applications.

- What is new in BPM and BPM technologies?
- How can BPM technologies enable more effective and innovative customer interactions?
- How will BPM technologies change the CRM applications market and who are some of the most interesting vendors?

**Isher Kaila, Research Director**

“Exceptional conference that delivers on the ‘what’ of CRM and the industry as a whole, but also provides insight into the ‘how and why.’ Provides a great roadmap to deliver to the executive team.”

— T. Stehling,  
Product Director Marketing,  
World Vision

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## Session Descriptions

### Track F – Vendors & Markets

#### F1. Vendor & Markets Session: The Market for CRM: Global Shifts and New Directions

The presentation addresses driving forces and trends affecting the CRM software market today, how the market is evolving, and where investments are being focused. 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 accelerating adoption of social communication networks and the impact of new technology and deployment models are discussed within the market context. This session provides the overarching framework for the Vendors and Markets track (Track F). It concludes with recommendations for business and technology strategies to consider implementing today.

**Sharon Mertz, Research Director**

#### F2a. Vendors & Markets: Customer Service Contact Centers Magic Quadrant

This session will provide the opportunity for a deeper discussion into the vendors and markets that shape organizational use of technology within the customer service contact center. The session will identify the key vendors that organizations should consider as they make buying decisions, and will cover the primary evaluation criteria used to position vendors in the quadrant. Vendor selection weightings will be discussed in the context of major business and technology drivers impacting this segment of the market.

**Michael Maoz, VP, Distinguished Analyst**

#### F2b. Vendors & Markets: Field Service Management Magic Quadrant

This session will provide the opportunity for a closer look at the primary vendors offering field service management solutions. As well as identifying the key vendors that organizations should consider as they make buying decisions, this session will provide insight into the key evaluation criteria used to position vendors within the quadrant. Business and technology trends affecting vendor positioning provide context for the discussion.

**Michael Maoz, VP, Distinguished Analyst**

#### F3a. Vendors & Markets: E-Commerce Magic Quadrant

This Magic Quadrant (MQ) session will offer the opportunity for a discussion into the key vendors within the E-Commerce market, and provide insight into the evaluation criteria and differentiators between the vendors.

**Gene Alvarez, Research VP**

#### F3b. Vendors & Markets: Web Analytics

This session will provide the opportunity for a deeper discussion into the vendors and market shifts within the web analytics market. As well as defining the key vendors that organizations should consider as they make buying decisions, this session will cover the evolution, trends, and future direction of the diverse landscape within this market.

**Bill Gassman, Research Director**

### Track F – Vendors & Markets (continued)

#### F4a. Vendors & Markets: CRM Service Providers, North America Magic Quadrant

This session will provide the opportunity for a deeper discussion into the vendors and service providers for CRM within North America who offer consulting and solution implementation services. As well as defining the key vendors that organizations should consider as they evaluate implementation partners, the sessions will provide insight into the evaluation criteria and differentiators between the vendors. Service provider strengths and cautions will be discussed in the context of critical skills and expertise required to successfully execute CRM projects.

**Matt Goldman, Research VP**

#### F4b. Vendors & Markets: Customer Data Mining Magic Quadrant

These sessions will provide the opportunity for a deeper discussion into the vendors and markets that shape organizational use of technology as an enabler of CRM. Each interactive session will focus on a particular component of the CRM market. As well as defining the key vendors that organizations should consider as they make buying decisions these sessions will provide insight into the key evaluation criteria and differentiators between the vendors.

**Gareth Herschel, Research Director**

#### F5a. Vendors & Markets: Sales Force Automation Magic Quadrant

This Magic Quadrant (MQ) session will provide the opportunity for a discussion into the key vendors within the Sales Force Automation (SFA) market and provide insight into the evaluation criteria and differentiators between the vendors.

**Robert DeSisto, VP, Distinguished Analyst**

#### F5b. Vendors & Markets: Incentive Compensation Management MarketScope

This MarketScope session will provide the opportunity for a discussion into the key vendors within the Sales Incentive Compensation market, and will provide insight into the evaluation criteria and differentiators between the vendors. Major market growth factors and trends will frame the discussion of vendors participating in this diverse market.

**Michael Dunne, Research VP**

#### F6a. Vendors & Markets: Marketing Resource Management Magic Quadrant

This Magic Quadrant (MQ) session will provide the opportunity for a discussion into the key vendors within the Marketing Research Management (MRM) market, and provide insight into the evaluation criteria and differentiators between the vendors. Vendor discussions will consider depth of solution, integration capabilities, and available deployment options.

**Kimberly Collins, Managing VP**

#### F6b. Vendors & Markets: Multichannel Campaign Management Magic Quadrant

This Magic Quadrant (MQ) session will provide the opportunity for a discussion into the key vendors within the Campaign Management market and provide insight into the evaluation criteria and differentiators between the vendors. Strengths and cautions will be discussed for both leading campaign management vendors and emerging niche players.

**Adam Sarner, Principal Research Analyst**

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