



May 4-6 | Las Vegas, NV | Mandalay Bay | gartner.com/us/outsourcing

Gartner Outsourcing & Vendor Management Summit 2009

Practical Outsourcing: Balancing Cost Optimization with Performance Improvement

\$200 Early Bird Discount!

Expires March 23, 2009

Details on page 21



Keynote Guest



Daniel Pink
Author, *A Whole New Mind*

Conference Chair



Linda Cohen
Gartner VP Distinguished Analyst

Gartner
Outsourcing & Vendor
Management
Summit 2009

gartner.com/us/outsourcing

What's the Riskiest Move in Outsourcing Today? Following the Herd

A cost-focused approach to outsourcing may make sense given the current state of the economy. Yet, is it really the best way to move forward?

More and more organizations and government agencies are adopting outsourcing to address immediate economic pressures. And for those already in the game, the emphasis is on re-evaluating contracts to improve efficiency and savings.

But buyer beware! Will the focus on cost trump value considerations? When the upturn comes, will your outsourcing deals be flexible enough to allow for sustainability, scalability and growth?

Learn how to best structure your outsourcing initiatives to meet your short term and long term goals at the Gartner Outsourcing & Vendor Management Summit. **The goal: to help you balance the pressures of cost optimization with those of performance improvement.**

The economy may be uncertain, but the outcome of your outsourcing efforts shouldn't be.

Our six-track agenda focuses on the success factors required of all your sourcing initiatives — **ITO, BPO, nearshore, offshore or onshore**. And whether you're an outsourcing newcomer or a veteran, you'll find sessions complementing your specific experience level.

What should you expect? Highly practical content to guide you through today's uncertainty. Anticipating market trends, we'll examine the very latest **alternative delivery models** — from **cloud computing to SaaS**. This is drill-down detail you won't want to miss — especially important now as more and more vendors offer improved performance at reduced costs. Which of these **utility style offerings** is the right fit? Get the answers and learn whether or not their prices are too good to be true.

Plus, we offer actionable analysis in two critical areas: **Vendor Management and Global Sourcing**. The former — because even in the best of times vendor relationships can test the durability of your value proposition. You'll gain strategic management practices to transform your providers into high-performing partners and ultimately, to derive greater value from your deal.

When it comes to Global Sourcing, we'll deliver an up-to-the minute view of current capabilities, offerings and options. Plus, we'll take an in-depth look at the real, hidden costs too often ignored.

The economy may be uncertain, but the outcome of your outsourcing efforts shouldn't be. See how to get them right. Register today for **Gartner Outsourcing & Vendor Management Summit, May 4-6 in Las Vegas**.



Sincerely,

Linda Cohen

Gartner VP Distinguished Analyst & Conference Chair

Event Highlights

- **Complimentary pre-conference tutorials** bring you up to speed—fast. New to outsourcing? Then be sure to start here.
- **6 tracks and over 100 sessions** offer a 360° view of the practical and the profitable in ITO, BPO, Global Sourcing and Vendor Management, plus selected sessions focused on Cost-Optimization strategies. Don't miss them.
- **Advanced appropriate content — takes your outsourcing smarts to the next level.** Specially developed sessions address the needs of the veteran. (See page 9 for more information on our Advanced sessions.)
- **Case studies and best practices from industry leaders** reveal the how's and why's of planning, executing, and implementing a range of sourcing programs.
- **Solution provider sessions present the latest info** on the products and services that can transform sourcing initiatives for the better.
- **Complimentary hands-on workshop sessions** immerse you in real-world problem solving and deliver practical takeaways.*
- **Analyst-user roundtables** provide informative exchanges between your peers and Gartner analysts. Expand your perspective and knowledge.
- **Peer-to-peer networking** refreshes your industry intelligence. Connect with fellow decision makers at breakfast sessions, sponsor receptions, networking lounges and more.
- **An exciting exhibit floor brings the world of global sourcing right to you.** Meet providers from leading and emerging countries. Discuss their specific delivery models and offerings. Get up to speed on hot new offshore destinations.



Keep It Strategic:

Outsourcing relationships can't be built on cost alone or on an "us vs. them" attitude. Do you have a vendor management discipline in place? If not, now's the time to start building one.

* Register for these limited participation workshops through our Agenda Builder tool at gartner.com/us/outsourcing. These workshops were "sold out" last year, so register early.

Attention: Procurement Managers and Vendor Management Executives

How savvy are you when it comes to outsourcing services and vendor relationships? New alternative forms of accessing technology such as cloud computing, SaaS and Business Process Utilities (BPUs) are on the rise. Are you ready to seize the opportunities they present? And what about turning your providers into high-performing strategic partners. Do you have the right management strategies in place? Get the solutions you need to create long-term value — whether it's adopting new offerings or improving your vendor management discipline — at **Gartner Outsourcing & Vendor Management Summit 2009**.

Benefits of Attending

The pressure is on to move fast, cut-costs and outsource more than ever. Here's how to get it right without compromising the future. At **Gartner Outsourcing & Vendor Management** you'll discover how to:

- **Immediately optimize** your outsourcing deals without jeopardizing strategic business value.
- **Become a well-educated buyer.** Know which prices, promises and offerings are too good to be true.
- Determine which **new alternative delivery models** best meet your cost-focused needs.
- Get to the next level of **cost benefits when offshoring**, without “chasing rates.”
- **Advance vendor management** from a set of procurement tasks to a mature discipline, and in the process, **derive greater value** from your outsourcing initiatives.
- Learn where **global delivery** is going next and which countries offer the most value.
- **Create meaningful dashboards** that measure vendor value from a business performance perspective.
- Develop a **viable BPO strategy** — one based on cost, performance and the right business-process-service models.

Who Should Attend

Gartner Outsourcing & Vendor Management Summit provides the most complete coverage on outsourcing today. A must-attend for business and IT management involved in their organization's sourcing activities — ITO, BPO and Global Delivery.

Government

Learn more about shared services successes and key offerings for the public sector.

Financial Services

Discover who's doing what and where they're getting it done.

Healthcare

See how to choose the right health care service provider at a cost that offers sustainable value.

Manufacturing

Learn how consolidation and globalization are impacting outsourcing strategies in manufacturing.

Procurement

See why a “best buy” approach may not always lead to the best business outcomes.

BPO

Get an in-depth view of the BPO market, as well an assessment of business-process-utilities (BPU).

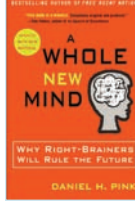


Is India Still the Answer?

Sourcing executives must take a long-term view of the countries that can deliver high-quality resources at the right price point. The level of recruitment in India, where higher demand leads to more hires, is not sustainable. Start considering other offshore destinations or ask your Indian vendor if they are doing more with automation.

Keynote Sessions

Keynote Guest



Daniel Pink

Wired editor, author of *A Whole New Mind: Why Right Brainers will Rule the Future*

Focus on Skills that Can't Be Outsourced Tuesday, May 5, 8:00-9:00am

How can organizations survive amid the chaos and disruption of 2009? The key, says bestselling author Daniel Pink, is to focus on skills that can't be outsourced. The era of "left brain dominance" — and the Information Age that it engendered — is giving way to a new world in which harder-to-outsource "right brain" abilities — artistry, inventiveness, empathy, and big picture thinking — will govern. Organizations that weave these "right brain" abilities into their business strategy will flourish. In his provocative and entertaining presentation, Pink will reveal the six abilities that now mark the fault line between success and failure.

Gartner Keynote Speakers

Multisourcing Today: Techniques for Optimizing Cost Containment and Performance Management

Monday, May 4, 8:00-9:00am

Linda Cohen

Gartner VP Distinguished Analyst

Chris Ambrose

Gartner Research VP

Gartner Research shows that outsourcing deals predicated on cost savings alone are doomed to fail and forecasted savings are seldom achieved long-term. But in an environment of unstable business conditions, where business stakeholders continually demand more for less, what techniques can be applied to drive cost improvement without compromising vendor performance and business outcomes?

End-User Panel: Making Outsourcing Work: Lessons Learned from the Trenches

Monday, May 4, 9:15-10:15am

Mike Lafford, Gartner GVP

Linda Cohen

Gartner VP Distinguished Analyst

Learn from a panel of your peers the competencies, tools and techniques applied in their outsourced operations to control cost and optimize vendor performance.

Outsourcing Initiatives: Balancing Excellence, Innovation and Cost

Wednesday, May 6, 8:30-9:30am

Helen Huntley, Gartner Research VP

Business demands and cost pressures are increasing. Outsourcing clients want more from their deals including reduced cost and better and faster delivery of services. In this presentation, we examine the realities and myths about outsourcing and how to get what you expect from the deal.

Meet the Gartner Analysts

For more than a decade, the Gartner team of analysts has tracked outsourcing trends and markets globally. In the process, they've developed close, on-going relationships with IT and business executives from top-performing organizations and government agencies. It is this unique vantage point of more than 50 analysts operating worldwide that shapes our conference content. Drawing upon their frontline experience, our analysts can guide you toward the right sourcing strategy — one that addresses immediate financial concerns while delivering viable and enduring business value.



Chris Ambrose
Research VP

Focus Areas: IT sourcing, outsourcing, and vendor contract, relationship, and performance management, analysis of trends in enterprise application hosting.



Dane Anderson
Research VP

Focus Areas: IT outsourcing, specifically services trends and scenarios, competitive landscape, infrastructure and application services, service provider capabilities and go-to-market strategies.



Robert Brown
Research VP

Focus Areas: Business process outsourcing (BPO), and Human Resources BPO (HRO), including payroll outsourcing services, recruiting (RPO) and end-to-end comprehensive HRO.



Ted Chamberlin
Research Director

Focus Areas: Emerging communication services MPLS, IP-VPN and Metro Ethernet, Hosted IP telephony, traditional carrier voice and data services, application-based services such as application hosting.



Linda Cohen
VP Distinguished Analyst

Focus Areas: Worldwide focus and development of Gartner's sourcing research, providing life cycle advice to clients procuring or delivering strategic sourcing services.



Kris Doering
Senior Director, Consulting

Focus Areas: All Lifecycles of Sourcing: Phase 1 – Strategy; Phase 2 – Vendor Selection; Phase 3 – Contract and Deal Development; Phase 4 – Relationship Management.



Cassio Dreyfuss
Research VP

Focus Areas: IT-business interface, IT planning, management and organization issues, sourcing management, sourcing governance, relationships, decision processes and collaboration, organizational change management.



Matt Goldman
Research VP

Focus Areas: Consulting and Systems Integration (C&SI), CRM services (supply and demand sides), including customer experience, customer care and pricing optimization.



Arabella Hallawell
Research VP

Focus Areas: Endpoint, email, and web security strategies and vendors, security outsourcing, privacy.



Helen Huntley
Research VP

Focus Areas: Global (Offshore) and domestic outsourcing, sourcing strategy, contracts terms and conditions, negotiations, assessing outsourcing readiness, governance, vendor management and delivery.



Mike Lafford
GVP

Focus Areas: Group vice president for Global Sourcing, Procurement and IT Asset Management Research; Member of the research executive management team, responsible for all aspects of business performance for this group, including client satisfaction, Research quality, Product Revenue streams and collaboration with other Gartner business units.



Partha Iyengar
VP Distinguished Analyst

Focus Areas: Applications Services, Global Delivery, Captive Centers, Vendor Management.





Frances Karamouzis
Research VP

Focus Areas: Sourcing Phases 1 & 2 (Sourcing Strategies & Vendor Selection), applications services (consulting, applications development, package implementations and applications outsourcing), global delivery of IT Services (off-shore/nearshore).



Richard Matlus
Research VP

Focus Areas: Sourcing lifecycle Phase 2 (vendor selection), Phase 3 (contract and deal development) and the development of service levels, sourcing decisions and infrastructure outsourcing.



Bill Maurer
Research VP

Focus Areas: Sourcing lifecycle Phase 2 (vendor selection) including RFP processes & evaluation methodologies & templates, Phase 3 (contract & deal development), including SLA's & contract structures & Phase 4 (relationship management).



Ben Pring
Research VP

Focus Areas: Software as a Service, Alternative Delivery and Acquisition Models (i.e. Cloud and Utility Computing), ERP Outsourcing, BPO.



Frank Ridder
Research Director

Focus Areas: IT Services Sourcing, Vendor Selection, Contracting, ITO, AO, Infrastructure Utilities, Multi-sourcing Excellence.



Edward Smythe
Director Consulting

Focus Areas: Global delivery networks, Global supplier and market trends, Continuous contract and service optimization, Productivity-driven cost reduction.



Bill Snyder
Research VP

Focus Areas: Process development, identifying organizational integrations and effecting improvements in IT efficiency, best practices in workstation, server and main-frame hardware and software asset management.



Cathy Tornbohm
Research VP

Focus Areas: Business process outsourcing (BPO), specializing in finance and accounting BPO and global adoption of BPO.



Gilbert van der Heiden
Research Director

Focus Areas: Sourcing strategy; multisourcing; application outsourcing; application services and levels; statements of work and operating level agreements



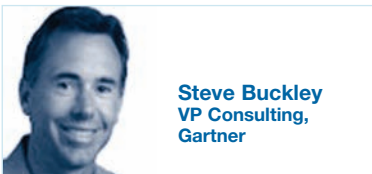
Allie Young
VP Distinguished Analyst

Focus Areas: IT services and outsourcing research, specifically for global trends and scenarios, competitive landscape, application outsourcing, and offshore/global delivery.

Gartner Analyst One-on-Ones

You set the agenda during these private 30-minute consultations with Gartner analysts. Visit gartner.com/us/outsourcing for details.

Featured Speaker



Steve Buckley
VP Consulting,
Gartner

Focus Areas: IT sourcing strategy, outsourcing, infrastructure, provider procurement process, negotiations, sourcing management, consulting.

Analyst-User Roundtables

Expect a lively exchange of information and ideas at these informal sessions moderated by a Gartner analyst. Expand your perspective and make valuable connections with peers from across industries as you discuss today's hot sourcing topics.

Get Practical ... Six Tracks Keep the Focus on Cost and Performance

A **IT Services and Providers: Optimizing Your Options, Minimizing Your Risks**

This track presents an overview of the IT Services marketplace and explores the trends in emerging and core services that can help improve performance and reduce costs. From traditional service lines to new models, here's an in-depth look at the vendors, their delivery capabilities and challenges.

B **Sourcing Strategies for Challenging Times: Taking Outsourcing to the Next Level**

In challenging times, organizations naturally retrench to focus on cost containment. But outsourced operations depend on collaboration among the enterprise's internal and external suppliers for survival and progress. See why collaboration in sourcing strategy, management and governance is critical to the success of outsourcing relationships.

C **Contracting for Flexibility: Can Utility and Traditional Sourcing Options Coexist?**

The current economy puts contracts under pressure for more flexibility in taking advantage of both industrialized, utility IT services along with more traditional models as needed. Effectively structuring contracts for the integration and co-existence of standardization and customization is a challenge that must be met. In this track, we clarify terms and conditions, SLAs and performance metrics that will allow organizations to take advantage of both delivery models.

D **Maturing Vendor Management: Designing and Mastering the New Business Discipline**

Vendor management requires a set of interdependent decisions and processes. Best in class organizations are moving vendor management from a set of procurement tasks to a mature discipline. This track provides the building blocks and best practices for that evolution.

E **Global Sourcing: Evolving the Value Proposition Beyond Labor Arbitrage**

Global sourcing is mainstream for applications services, but the new frontiers are BPO and Infrastructure. Country options extend far beyond India, with Gartner tracking over 30 countries as viable offshore destinations. This track presents Gartner's latest research in country analysis and service categories, as well as best practices to effectively execute and deliver long-term value beyond cost reduction.

F **Business Process Outsourcing: Developing Your Strategy and Managing Your Risk**

New business-process-service models offer both cost optimization and business improvement. But the outcomes depend on selecting the right model. This track provides insight and guidance into creating and sustaining the optimal BPO strategy for your organization.

Conference Sessions with Two Separate Focuses — Cost Optimization and Advanced

Advanced Sessions

If you're a seasoned executive or manager deeply committed to a variety of outsourcing initiatives and looking to take them to the next level of performance, Gartner Outsourcing & Vendor Management Summit provides the tools to create your own customized map to sourcing. See the Agenda-at-a-Glance on page 10-11 for those sessions categorized as Advanced (A) sessions.

Sessions cover:

- Assessing the Health of Your Outsourcing Deal
- Governance, Due Diligence and Risk in Global Sourcing
- Alternative Delivery and Acquisition Models
- Evolution of Methodologies in Global Sourcing
- Developing a New Generation of Outsourcing Performance Metrics and Dashboard
- Driving Outsourcing Cost Reductions through a Focus on Productivity and Innovation
- **Workshop:** Improve Business Outcomes and Service Integration Using OLAs



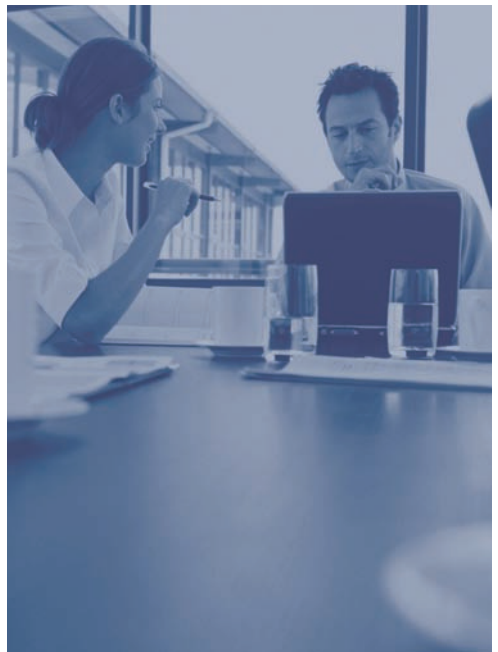
Go to:
gartner.com/us/outsourcing
 for suggested agendas
 based on your outsourcing
 experience.

Cost Optimization Sessions

In today's uncertain economy, organizations are expected to reduce costs, scrutinize new investments and become hyper-efficient in everything they do. And your outsourcing initiatives are no exception. That's why we've developed a variety of sessions that show how to best optimize your outsourcing investments. See how to balance the imperatives of cost with those of performance. See the Agenda-at-a-Glance on page 10-11 for those sessions categorized as Cost Optimization (CO) sessions.

Sessions Cover:

- Don't Just Cut Sourcing Costs — Strategize and Optimize
- A Cost Effective Guide to Building and Sourcing Your Global Network
- Driving Outsourcing Cost Reductions through a Focus on Productivity and Innovation



Agenda at a Glance

Sunday, May 3, 2009

12:00pm	Registration	
	Pre-Summit Tutorials	
3:00pm	T1. IT Services Market Leaders — M. Goldman	T2. Using Benchmarking as a Cost Optimization Tool — R. Matlus and K. Doering
4:15pm	T3. Renegotiation Strategies for Success — H. Huntley	T4. Using Standards and Methodologies to Improve Outsourcing Performance — R. Matlus
5:30pm	T5. Selecting Service Providers in Uncertain Times — D. Anderson	T6. How to Manage Security and Privacy Challenges When Going Offshore — A. Hallawell

Monday, May 4, 2009

7:00am	Registration & Attendee Breakfast					
7:45am	Welcome Address					
8:00am	K1: Keynote Session: Multisourcing Today: Techniques for Optimizing Cost Containment and Performance Management — Linda Cohen, Gartner VP Distinguished Analyst, and Chris Ambrose, Gartner Research VP					
9:15am	K2: Keynote Session: End-User Panel: Making Outsourcing Work: Lessons Learned from the Trenches — Mike Lafford, Gartner GVP, and Linda Cohen, Gartner VP Distinguished Analyst					
10:30am	Solution Provider & Case Study Sessions					
11:30am	Attendee Lunch & Solution Showcase Dessert Reception					
	TRACK A: IT SERVICES AND PROVIDERS	TRACK B: SOURCING STRATEGIES FOR CHALLENGING TIMES	TRACK C: CONTRACTING FOR FLEXIBILITY	TRACK D: MATURING VENDOR MANAGEMENT	TRACK E: GLOBAL SOURCING	TRACK F: BPO
1:30pm	A1: Services Market Insights: Prudent Choices for Prosperous Outcomes — A. Young	B1: Don't Just Cut Sourcing Costs — Strategize and Optimize — C. Dreyfuss CO	C1: Outsourcing Contracting: Balance Risk and Speed Using the Right Approach — F. Ridder	D1: Chaos to Control: The Emergence of IT Vendor Management — C. Ambrose	E1: Global Sourcing: State of the Market and Future Trends — F. Karamouzis	
2:45pm	Solution Provider Sessions & Case Studies					
4:00pm		B2: Practical Realities — Adjusting Your Sourcing Strategy for Tough Times — F. Karamouzis	C2: The Nine Deal Complexity Factors and Pricing Mechanisms that Optimize Outsourcing — B. Maurer	D2: Developing a Vendor Management Program — B. Snyder	E2: Contracting in a Globally Sourced World: Understand the Pitfalls and How to Avoid Them! — H. Huntley	F2: BPO's Moment of Truth: Evolution of the Market During Economic Downturn — R. Brown
5:00pm	Solution Showcase Reception					

Tuesday, May 5, 2009

7:00am	Registration & Networking Breakfast					
8:00am	K3: Keynote Session: Focus on Skills That Can't Be Outsourced — Daniel Pink, Author of <i>A Whole New Mind: Why Right Brainers Will Rule the Future</i>					
9:15am	A3: A Cost Effective Guide to Building and Sourcing Your Global Network — T. Chamberlin CO		C3: Practical Outsourcing: How to Structure SLAs, Penalties and Incentives — B. Maurer and G. van der Heiden	D3: Workshop: Assessing the Health of Your Outsourcing Deal — B. Snyder and S. Buckley A	E3: Governance, Due Diligence and Risk in Global Sourcing — P. Iyengar A	F3: Streamlining Your BPO Strategy — What Does the Future Look Like? — C. Tornbohm
10:30am	A4: Alternative Delivery and Acquisition Models: Where We Are, Where We Are Going — B. Pring A	B4: The Practical Approach to Lean, Effective Multisourcing — F. Ridder	C4: Contracting for Utility Services: Flexible, Measurable and Now — T. Chamberlin and B. Maurer		E4: IT Infrastructure Outsourcing in an Offshore Delivery Model — R. Matlus	
11:30am	Attendee Lunch & Solution Showcase Dessert Reception					
11:45am	Sponsor Lunch Address					
1:30pm	End User Case Study Visit gartner.com/us/outsourcing for case study updates.	End User Case Study Visit gartner.com/us/outsourcing for case study updates.	Case Study Panel: Contracting in a World of Co-existing Utility and Traditional Sourcing — F. Ridder	End User Case Study Visit gartner.com/us/outsourcing for case study updates.	Case Study Panel: Gartner Update on China & Client China Sourcing Experience	End User Case Study Visit gartner.com/us/outsourcing for case study updates.
2:30pm	Solution Provider Sessions & Case Studies					
3:45pm	End User Case Study	End User Case Study	C5: Driving Outsourcing Cost Reductions Through a Focus on Productivity and Innovation — E. Smythe CO + A	End User Case Study		F4: Critical Success Factors in Managing BPO: Lessons Learned From the Front Lines — R. Brown
4:30pm	Hospitality Suites					

Wednesday, May 6, 2009

7:30am	Breakfast with the Analysts					
8:30am	K4: Keynote Session: Outsourcing Initiatives: Balancing Excellence, Innovation and Cost — Helen Huntley, Gartner Research VP					
9:45am	Solution Provider Sessions & Case Studies					
10:30am	A5: The Infrastructure Services Scenario: Trends, Futures, Directions and Decisions — D. Anderson	B5: A Hands-On Approach to the Strategy and Management of ADAM Services — B. Pring		D5: Workshop — Developing a New Generation of Outsourcing Performance Metrics and Dashboards — C. Ambrose and K. Doering A	E5: Evolution of Methodologies in Global Sourcing — Does Agile work? — P. Iyengar A	F5: BPO Contracting and Pricing Trends: From the Lawyers Lair — C. Tornbohm and L. Cohen
11:30am	Attendee Lunch & Solution Showcase Dessert Reception					
12:30pm	A6: Application Services Scenario: Trends, Futures, Directions and Decisions — A. Young	B6: Build a Sourcing Governance Framework to Deliver Business Value — C. Dreyfuss	C6: Workshop — Improve Business Outcomes and Service Integration using Operating Level Agreements — B. Maurer and G. van der Heiden A		E6: Picking the Right Country Destination for Offshore Services — P. Iyengar	F6: Global Delivery Models in BPO — C. Tornbohm
1:45am	A7: Workshop: When to Choose SaaS/Cloud Over Traditional IT Offerings — B. Pring and D. Anderson	B7: Outsourcing Security: Challenges and Strategies — A. Hallawell		D7: Fostering Better Outsourcing Relationships Through Balanced Trust and Control — L. Cohen	E7: Transition and Knowledge Transfer in Globally Delivered Outsourcing — E. Smythe	
2:45pm	Conference Adjourns					

CO = Cost Optimization Session **A** = Advanced Session

See page 9 for details on our "Cost Optimization" and "Advanced" classifications.

* Agenda current as of February 20, 2009 and subject to change.

Pre-conference Tutorials

T1: IT Services Market Leaders

M. Goldman

This session reviews the Gartner methodology for vendor evaluation and spotlights key IT services markets to demonstrate how Magic Quadrants and Marketscopes can be used to analyze competitive positioning, understand major market trends, and improve vendor selection.

T2: Using Benchmarking as a Cost Optimization Tool

R. Matlus and K. Doering

Benchmarking is an important cost-optimization tool that clients can use to evaluate and manage an outsourcing deal between themselves and the External Service Provider (ESP). In this current economic downturn, clients should ensure that the outsourced deal's price and service levels remain fair and competitive. This tutorial shows how to use benchmarking as a tool to validate ESP price and performance and offers advice on how to make adjustments as needed.

T3: Renegotiation Strategies for Success

H. Huntley

Heading into renegotiations without fully understanding the strengths and weakness of both contractual parties can put you at a unique disadvantage. This presentation identifies how to approach renegotiations, with insights into the advantages and risks encountered by both parties.

- How do service recipients best position themselves for renegotiation success?
- What are the risks and impacts of renegotiation for both sides of the deal?



Is the Price Right?

Price competition for outsourcing deals, particularly for standardized IT outsourcing (ITO) services, will be fierce. Be sure you're not lured in by low prices from providers trying to make quarterly revenue goals or build market share.

T4: Using Standards and Methodologies to Improve Outsourcing Performance

R. Matlus

Repeatability of service delivery is critical in delivering consistent, reliable, and cost effective services. With business demands more dynamic and unpredictable, and services more complex, simple delivery processes are not enough to assure the expected performance levels. The challenge is then to adopt specific mechanisms — methodologies, frameworks, standards and toolsets — that will simplify service delivery and improve outsourcing performance.

- Which standards and methodologies will help deliver services?
- What are the practical steps in the evaluation of providers' methodologies?
- How can they be applied to achieve high performance?

T5: Selecting Service Providers in Uncertain Times

D. Anderson

Successful outsourcing requires following a set of proven processes during the vendor evaluation and selection phase. In uncertain times, certain parts of the process — like due diligence, security concerns, cost management and risk management — require special attention. This session examines best practices for conducting an effective provider evaluation with a special focus on today's marketplace.

- How do you evaluate sourcing providers?
- What are best practices for developing an evaluation document?
- Which are the successful processes used to evaluate service providers?

T6: How to Manage Security and Privacy Challenges When Going Offshore

A. Hallawell

Here is a brief update on China as a destination for offshore services along with a client presentation showcasing an enterprise's sourcing experience in that country.

- What is the current state of buyer demands and supplier offerings?
- What does the future hold?
- What are some real-life experiences of enterprises currently sourcing in China?



Track A: IT Services and Providers

A1. Services Market Insights: Prudent Choices for Prosperous Outcomes

A. Young

Here's an overview of trends and market dynamics in the global services market, including Gartner forecasts and marketshare reports, vertical market drivers, contract trends, and future growth opportunities.

- What are the key trends and user strategies shaping the size and growth of the IT services/outsourcing market?
- What is the nature of the competitive landscape and user options for service relationships?
- What are the key forces and practical frameworks for navigating this market?

A3. A Cost-Effective Guide to Building and Sourcing Your Global Network

T. Chamberlin

Network sourcing is growing, with support for critical services in both fixed and mobile. This is a sea change for enterprises, many of which had supported these critical networking services in the past. Companies are looking beyond their borders to unify services and strengthen their networks.

- How will the network service provider market evolve and affect enterprises' vendor selection?
- How should enterprises work with service providers with emerging global capabilities?
- Who are the best network service providers?

A4. Alternative Delivery and Acquisition Models (ADAMs): Where We Are, Where We Are Going?

B. Pring

This session provides an overview of ADAMs and their impact on both users and providers, now and in the future.

- How significant will ADAMs be during the next five years?
- In which areas will ADAMs make the most impact?
- How can software and services suppliers maximize the potential of ADAMs and minimize associated risks?

A5. The Infrastructure Services Scenario: Trends, Futures, Directions, and Decisions

D. Anderson

Although infrastructure outsourcing has matured, the broader types, means and methods of infrastructure services available in the market remain dynamic. This is occurring as the traditional methods morph and evolve into alternative delivery and acquisition models.

- What is the current state and future forecast of the infrastructure outsourcing market?
- How will the infrastructure services landscape change?
- What considerations and decisions are required for successful infrastructure sourcing?

A6. Applications Services Scenario: Trends, Futures, Directions, and Decisions

A. Young

Taking clients through the demand and supply side of applications services, this session examines the latest industry intelligence from enterprise buyers and vendors. Also reviewed are key market forces impacting demand and supply cycles.

- What are the key market forces impacting application services?
- What are the most critical needs customers are voicing on the demand side?
- What is changing on the supply side of applications services?

A7. Workshop: When to Choose SaaS or Cloud Over Traditional IT Offerings

B. Pring and D. Anderson

This workshop offers guidelines for determining use of SaaS or Cloud services, which are compelling alternatives to more costly traditional IT services. Up for discussion: if SaaS or Cloud services is a good fit for your enterprise and where they may make a better fit than traditional IT offerings.

- What are SaaS and Cloud services and what functions do they serve?
- How can enterprises determine if SaaS or Cloud is a good fit?
- What can you do in the short term to prepare for or take advantage of SaaS and Cloud offerings?

Track B: Sourcing Strategies for Challenging Times

B1. Don't Just Cut Sourcing Costs — Manage Them

C. Dreyfuss

Many enterprises are currently embarking on blind cost-cutting crusades, often with a negative impact on the business. What's required is a business perspective that considers the value and risks so that sourcing initiatives can deliver value while optimizing costs. This session presents a new approach to the age-old question of costs associated with sourcing.

- What are the common cost-cutting traps?
- What business value do sourcing initiatives deliver?
- What is the business-oriented approach to optimize sourcing costs?

B2. Practical Realities: Adjusting Your Sourcing Strategy for Tough Times

F. Karamouzis

Weathering a range of economic storms, enterprises are being forced to look for ways to achieve business results and cost savings within the current fiscal year. Here we discuss practical approaches to revisiting and adjusting sourcing strategies to address current business realities.

- How do current business realities impact traditionally built sourcing strategies?
- What key factors must be re-examined and recalibrated to deliver the enterprise's revised business priorities?
- Which frameworks and tools can the enterprises utilize to adjust sourcing strategies?

B4. The Practical Approach to Lean, Effective Multisourcing

F. Ridder

Organizations have to develop specific competencies to master multisourcing, making it both lean and effective. This presentation introduces the ten multisourcing competencies, explains why they are critical, and discusses options for their practical implementation.

- Why does multisourcing management require specific competencies?
- What are those key multisourcing competencies and why are they critical?
- What does lean and effective multisourcing management look like?

B5. A Hands-On Approach to the Strategy and Management of ADAM Services

B. Pring

The way enterprises buy IT is changing. Providers bundle hardware, software, and services in different ways and receive payment for them when they're consumed. Collectively called Alternative Delivery and Acquisition Models, or ADAMs, they promise a host of business advantages and can range from Software as a Service (SaaS) to cloud computing and infrastructure utility (IU). Learn how to maximize their benefits.

- What are the major pros and cons of using ADAM services?
- How should IT and the business work together to get the most from ADAM services?
- How should you choose, negotiate, and manage ADAM services?

B6. Build a Sourcing Governance Framework to Deliver Business Value

C. Dreyfuss

When designing your sourcing governance framework, you must ensure it supports the organization's business objectives, integrates your providers' respective governance frameworks, and complies with regulatory and other mandated requirements. To assure these three objectives are met, a structured approach is required.

- How does sourcing governance align to business objectives?
- How can you integrate business objectives with other sourcing governance goals?
- How do you build a sourcing governance framework?

B7. Outsourcing Security: Challenges and Strategies

A. Hallawell

Because more organizations are outsourcing key security functions, as well as IT functions, they need to ensure security controls are maintained and reviewed. This presentation examines the security services landscape and offers best practices to use for vendor assessment and negotiation and in setting up security governance models when the bulk of IT has been outsourced.

- How does sourcing governance align to business objectives?
- How can you integrate business objectives with the other sourcing governance goals?
- How do you build a sourcing governance framework?

Track C: Contracting for Flexibility

C1. Outsourcing Contracting: Balance Risk and Speed, Using the Right Approach

F. Ridder

Drawing upon many different resources, the vendor selection and negotiation phase can be quite long and costly in an outsourcing contract. This presentation explores how to shorten it and save costs by striking the right balance between speed and risk.

- What makes the vendor selection and contracting phase so long in outsourcing?
- How can you gain speed within the process?
- How do you balance risk and speed in getting to an outsourcing agreement?

C2. The Nine Deal Complexity Factors and Pricing Mechanisms That Optimize Outsourcing

B. Maurer

Many organizations use incorrect pricing models when outsourcing services for applications and infrastructure. This presentation examines the available pricing options, the pros and cons of each choice, and the most current pricing ranges.

- What are common pricing models, which models are best suited for different contracted work and what are the most current pricing ranges?
- What are the nine deal complexities and how can you adjust them?
- What impact will the correct pricing model and nine complexity factors have on price?

C3. Practical Outsourcing: How to Structure SLA's, Penalties, and Incentives

B. Maurer and G. van der Heiden

This workshop examines how to structure SLA's, incentives and penalty clauses, based on Gartner's best practices.

- What are best practices for structuring SLA's, penalties, and incentives?
- What is a practical process for developing own clauses?
- How do you drive the right internal behavior and expectations, and right service provider behavior?

C4. Contracting for Utility Services: Flexible, Measurable, and Now

T. Chamberlin and B. Maurer

A focus on productivity can provide sustainable cost advantages and operational flexibility, both of which are increasingly critical in determining the business value of outsourcing initiatives. This presentation outlines the key drivers of productivity, identifies approaches to embed productivity into outsourcing objectives and strategy, and provides practical steps for companies to realize cost savings.

- Why do companies need to focus on productivity and innovation as drivers of cost reduction in outsourcing relationships?
- How can productivity-driven cost reduction become embedded in outsourcing objectives and strategy?
- What practical steps can companies take to realize value from productivity-driven cost reduction?

Case Study Panel Discussion: Contracting in a World of Co-existing Utility and Traditional Sourcing

F. Ridder

This panel discusses a case study in which an organization, looking to secure a contract in an environment where utility and traditional outsourcing services coexist, uses an external legal advisor.

- What are critical success factors for contracting in a world where utility and traditional solutions coexist?
- What are the do's and don'ts for providers, organizations, and external advisors?
- How can organizations best prepare for success when contracting utility and traditional services?



Make It Win-Win:

When structuring outsourcing contracts both parties should arrive at contract terms that include fair pricing and long-term sustainable value. If the provider is left with only marginal profit or limited revenue growth, service quality issues may emerge.

Track C continued

C5. Driving Outsourcing Cost Reductions Through a Focus on Productivity and Innovation

E. Smythe

As more and more companies focus on IT costs in the current economic landscape, a focus on productivity and innovation can deliver both improved performance and lower costs. A productivity focus can provide sustainable cost advantages and operational flexibility that are increasingly critical in determining the business value of outsourcing initiatives. This presentation outlines the key drivers of productivity, identifies approaches to embed productivity into outsourcing objectives and strategy, and provides practical steps for companies to realize cost savings through productivity and innovation.

- Why do companies need to focus on productivity and innovation as drivers of cost reduction in outsourcing relationships?
- How can productivity-driven cost reduction become embedded in outsourcing objectives and strategy?
- What practical steps can companies take to realize the value from productivity-driven cost reduction

C6./C7. Workshop: Improve Business Outcomes of IT Services with Service Integration, Using Operating Level Agreements (OLAs)

B. Maurer and G. van der Heiden

Managers source their needs either through traditional models or industrialized IT services. This potentially increases the number of key team members. But how do you get them to work together for the best results? This presentation uses the team analogy to explain the benefits of using OLA's to support the management of service integration from an end-to-end perspective.

- Why do you need OLAs to manage service integration?
- How do you integrate OLAs in your existing and new services agreements?
- What models can be used to manage service integration supported by OLAs?



Track D: Maturing Vendor Management

D1. Chaos to Control: The Emergence of IT Vendor Management

C. Ambrose

Too many organizations have relied on ad-hoc vendor management. This has led to a lack of pricing competitiveness, suboptimal vendor performance, and diminished vendor value. Discover best practices in vendor management design, organization, and driving improved vendor performance.

- Why is vendor management emerging?
- What does a good vendor management structure look like?
- How can vendor management improve vendor performance?

D2. Developing a Vendor Management Program

B. Snyder

Holistic vendor management is not a part-time activity. It requires planning and discipline. Effective vendor management occurs when each team member and respective recipient of the service work toward the same goal: maximizing vendor value. See how to develop a vendor management program and ensure that each vendor in the program delivers at an optimal level.

D3./D4. Workshop: Assessing the Health of Your Outsourcing Deal

B. Snyder and S. Buckley

This session addresses the most critical issues outsourcing relationships face, provides a framework for determining the underlying causes, and offers recommendations for putting a deal back on track.

- What are the most common issues faced in long-term outsourcing relationships?
- How can organizations assess the relative health of their outsourcing deal?
- What actions can be taken in the short term to improve the performance of an outsourcing relationship?

D5. Workshop: Developing a New Generation of Outsourcing Performance Metrics and Dashboards

C. Ambrose and K. Doering

Learn the methods and metrics for effectively measuring and communicating vendor performance in your organization. And see how to define the inputs, outputs, processes, and interactions for an effective vendor management dashboard.

- What are the best methods and metrics for evaluating vendor performance?
- Who should be involved in developing these methods and metrics?
- How should performance metrics be displayed to the various stakeholders in your organization?

D7. Fostering Better Outsourcing Relationships through Balanced Trust and Control

L. Cohen

Service providers and service recipients struggle to identify and manage the key elements that will establish a "trust-based" relationship and provide a framework for success. When more and more work is delivered by multiple vendors, the demands on business-to-business relationships are even greater. This presentation identifies the mechanisms and techniques to ensure an optimal relationship.

- What are the main challenges to establishing trust in a multisourced operation?
- What are the necessary controls to manage a balanced relationship?
- What are the best practices in building confidence when utilizing a multisourcing model?



Keep an Eye on the Future:

Structure your contracts with the ability to shift focus toward enhancement and innovation. Changes in the economy or internal in your business will inevitably occur in a multi-year outsourcing deal, and you'll want flexibility.

Track E: Global Sourcing

E1. Global Sourcing: State of the Market and Future Trends

F. Karamouzis

Global Sourcing continues to be a dynamic area. And in the past nine months, it has received increased scrutiny due to a range of events — from the terrorist attacks and Satyam Scandal in India to the largest single year expansion to other offshore destinations.

- What are the major trends and drivers for offshore services?
- What are the key challenges faced by service providers and service recipients?
- How will global delivery move to the next stage in its evolution?

E2. Contracting in a Globally Sourced World: Understand the Pitfalls and How to Avoid Them

H. Huntley

Structuring an effective outsourcing contract in a globally sourced world can be a harrowing experience. Discover the critical contractual components of a global sourcing deal and explore new areas to consider when “going global” for services.

- Which outsourcing contract elements are needed for a successful global deal?
- What global sourcing risks can be mitigated by effective contract terms and conditions?
- What are the impacts of a global sourcing contract on your enterprise?

E3. Governance, Due Diligence, and Risk in Global Sourcing

P. Iyengar

Recent events in the offshore services world have highlighted issues surrounding governance and regulatory risk in Global Sourcing. This session assesses what is real and what is hype and examines the steps enterprises should take as reasonable risk mitigation measures.

- Why is there an increased focus and concern around governance issues?
- Is this a systemic problem with offshore services?
- What should enterprises do to achieve the best cost-benefit in risk mitigation vs. increased costs of risk mitigation?

E4. IT Infrastructure Outsourcing in an Offshore Delivery Model

R. Matlus

Most companies view IT infrastructure functions, such as operations and technical support, as being traditionally delivered within the IT department and provided locally. However, with today's increased focus on cost reduction, a major shift is occurring in the way these services are being delivered from onsite to offsite locations. This session concentrates on the remote offshore delivery of IT Infrastructure.

- What is the current market like for remote monitoring and support of systems and infrastructure?
- Who are the providers and what are their remote offerings?
- What are the concerns or issues with the remote infrastructure delivery models?

Case Study Panel Discussion: Gartner Update on China & Client China Sourcing Experience

F. Ridder

Visit gartner.com/us/outsourcing for agenda updates.

E5. Evolution of Methodologies in Global Sourcing: Does Agile Work?

P. Iyengar

The promise of shortened development cycles and timeframes, in the context of a demanding business stakeholder environment, is generating greater focus and interest in agile methodologies. Increasingly, this is being coupled with the robust growth of offshore services. The result is strong interest in leveraging agile methodologies in an offshore services — insourced or outsourced — paradigm.

E6. Picking the Right Country Destination for Offshore Services

P. Iyengar

The drive towards globalization, combined with the prevailing economic crisis, has created a series of complex choices for organizations that want to take advantage of global service delivery options. Developing an approach to the selection of optimum offshore locations has become a critical competency. See how to make the right choices in uncertain times.

- Which are the leading locations for offshore services?
- How do you select among the various offshore locations?
- How do you manage the risks?



E7. Transition and Knowledge Transfer in Globally Delivered Outsourcing

E. Smythe

As more and more outsourcing services are delivered through a multisourced global delivery network, companies and vendors have to address higher levels of complexity and risk in transitioning work to multiple locations, potentially across multiple vendors. This presentation and interactive case workshop explores these issues, and provides participants with key concepts and practical steps they can take to define and manage global transitions.

- What considerations must clients and vendors take into account to plan and execute a globally delivered transition?
- How are staffing models determined for transition management?
- How can process vs. location phasing decisions be balanced to minimize transition risk and to accelerate client benefits.



Anticipate Surprises:

Consolidation in the provider market is likely to occur more frequently in an uncertain economy. Be sure to include contract termination clauses in the event your service provider is acquired.



Track F: BPO

F2. BPO's Moment of Truth: Evolution of the Market During an Economic Downturn

R. Brown

BPO services have long been used to cut costs and to focus on core competencies. Those needs have never been more compelling than during the current economic downturn. This presentation examines the state of the BPO market, and the evolutionary path it will take through the recession and eventual economic recovery.

- How does the recession's impact on the BPO market differ from past downturns?
- Which short-term BPO offerings are viable as quick cost-reduction tactics?
- What long-term challenges and benefits should buyers expect from the BPO market, including supplier viability?

F3. Streamlining Your BPO Strategy: What Does the Future Look Like?

C. Tornbohm

This presentation discusses what it takes for BPO buyers to move towards a standardized, automated service mentality. The strategies needed for drastic cost cutting in business processes are also highlighted.

- What does a good BPO strategy look like?
- What does a good vendor look like?
- What are buyer best practices in BPO?

F4. Critical Success Factors in Managing BPO: Lessons Learned from the Front Lines

R. Brown

This session provides practical advice — informed by on-going dialogue with some of the worlds' leading BPO buyers — on what has worked well for them in vendor management. The discussion also examines BPO sourcing management funding and engineering-contract upgrades used to drive continuous process improvement.

- What are key lessons learned in managing BPO?
- What are the critical success factors in making the relationship work?
- How can BPO be future-proofed and responsive to business changes in a multi-year deal?

F5. BPO Contracting and Pricing Trends: From the Lawyers Lair

L. Cohen and C. Tornbohm

Understand what is best practice in BPO contracting, (before you get to the lawyers office!) This panel discussion with the key legal advisors in the world of BPO will provide valuable insight into trends in contracting, pricing and best practice adoption.

- What are the current trends in BPO contracting?
- How do contracts differ for onshore and offshore services?
- What are key mistakes to avoid when contracting for BPO?

F6. Global Delivery Models in BPO

C. Tornbohm

Trends in global delivery of BPO differ by type of process. Here we outline best practices in BPO offshore delivery, the provider landscape, and the impact on underlying technologies.

- What global delivery is currently and will be used in BPO?
- What are best practices in remote BPO delivery?
- What is the provider landscape for BPO global delivery?



Act Fast:

More competition and more outsourcing mean longer sales and decisions cycles. In turn, this can add to the cost of the deal or even cause a well-qualified provider to lose interest. Be prepared to execute quickly, but in the right way.



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