

New!
Agendas by
role and initiative.
See inside.

Gartner IT Financial, Procurement & Asset Management Summit 2009

Join us November 9 – 11 in Florida at the
Renaissance Orlando Hotel at SeaWorld.

Guest Keynotes



P.J. O'Rourke
Author and Political Satirist



Pat Cicala
President and CEO
Cicala & Associates

Summit Chair



Bill Snyder
Research Vice President

Align short-term results with long-term strategy.

- Optimize IT costs.
- Avoid expensive mistakes.
- Position for the future.
- Maximize the financial impact of IT now.

Gartner
IT Financial,
Procurement &
Asset Management
Summit 2009

Early-bird savings
Register by September 18 and save \$200.

November 9 – 11
Orlando, FL
gartner.com/us/itam

The financial implications of managing your IT assets are more important than ever.

At the **Gartner IT Financial, Procurement & Asset Management Summit**, we're ready to help you balance the demands of short-term cost cutting with long-term optimization efforts. You'll see how to improve your ability to drive IT efficiencies, meet customer demands and, ultimately, make the right moves to position your enterprise for recovery.

It all comes down to making the most informed decisions about determining which assets are the right ones at the right price and time. See how to get it done and prevent the kind of expensive mistakes that can threaten the overall health of your IT organization and your business. Join us in Orlando, FL, from November 9 – 11.

What's in it for you?

A wealth of actionable tools, tactics and strategies to help you:

- **Accelerate** cost savings by avoiding expensive mistakes.
- **Power up** negotiating skills for hardware and software contracts and license agreements.
- **Manage** diverse demands despite limited resources.
- **Reduce** the total cost of ownership for infrastructure.
- **Address** the latest developments in virtualization, cloud computing and consolidation in the vendor community.
- **Leverage** the impact of new technologies, tools and trends.
- **Forge** stronger relationships between IT, finance and procurement.

Hot topics

- Cost-optimization tactics and strategies
- Server cost optimization
- Lean and flexible IT costs
- Total cost of ownership for infrastructure
- Asset management best practices and processes
- Negotiating skills for hardware and software contracts and license agreements
- IT asset life cycles
- Application rationalization and customization
- IT financial management and enterprise architecture
- Virtualization, cloud computing and consolidation in the vendor community
- Impact of new technologies, tools and trends
- Procurement best practices and models
- ITAM standards and frameworks
- Vendor risk management
- Future trends in software licensing
- Audits, BSM, CMDB, green IT
- E-sourcing
- Enterprise architecture: the underpinning of financial management and planning
- Green IT: disposal of assets



Get all this at one event.

32 sessions across four tracks

See how to optimize costs, prioritize projects and maximize the financial impact of IT asset management (ITAM). Our analysts deliver exactly what you need with the very latest analysis, real-world case studies and best practices.

Recommended agendas by role and initiative

This year, we're offering recommended agendas tailored to your specific roles and initiatives—13 agendas in all. For each time slot within the conference schedule, we've recommended sessions super-relevant to your on-the-job needs. See page 7 for details and visit gartner.com/us/itam for full custom agendas.

Sessions by experience level

We've identified foundational and advanced sessions to meet your specific needs.

Insightful keynote speakers

Stay on top of today's trends and tomorrow's developments with thought leaders who help you weigh old approaches against new directions in your pursuit of finance, ITAM and procurement excellence.

Complimentary preconference tutorials

Get up to speed on key topics fast, from surviving a software audit to building an effective procurement organization. And for those further along, hear about performance management and TCO.

Analyst one-on-ones

Meet face-to-face with Gartner analysts for 30 minutes of personalized advice on the finance, ITAM and procurement topic of your choice.

End-user case studies

Hear real-world stories, absorb lessons learned and discover how ITAM executives and managers from leading organizations have met tough challenges and made success happen.

Analyst-user roundtables

Tap into sound advice for challenging times. Facilitated by Gartner analysts, these highly informative sessions offer the chance to learn directly from other participants' experiences.

Networking breakfasts

Begin your day with newfound energy at these informal early-morning gatherings with Gartner analysts and peers in your industry.

Solution provider sessions

Leading providers share best practices, strategies and offerings. End users share lessons learned from real-world ITAM initiatives.

Solution provider showcase

Kick start your own vendor research, meet with company representatives to discuss your challenges and create a shortlist of providers and solutions.

Town hall session

Find out who's getting it right at an informal town hall meeting where you'll engage in a lively and informative Q&A with Gartner analysts and other summit attendees.

Conference documentation

Access the complete set of PowerPoint presentations for each analyst-led session—even those you can't attend.

Compelling reasons to register now

Our attendee Justification Kit makes it easy to demonstrate the value of your summit experience. The kit includes a customizable letter, cost-benefit analysis, cost-optimization highlights, top 10 reasons to attend and more. Go to gartner.com/us/itam for details.

Expand Your Bandwidth—Meet the Experts

Guest Keynotes

Adam Smith and Technology: Who is the Winner?

America's leading political satirist and the best-selling author of 12 books, Mr. O'Rourke provides his unique, amusing perspective on how technology has revolutionized the world...or not. But what would Adam Smith think about the information age and the seemingly endless obsolescence? Join us as Mr. O'Rourke discusses the intersection of the pioneer of economics and today's technology in a most humorous manner.



*P.J. O'Rourke,
Political Satirist and
Best-Selling Author*

CXO Reporting:

What They Want and What You Need to Give It to Them

Organizing mature IT financial and asset data to facilitate better business decisions is invaluable. Everyone has reports, but what do you need to think about to make a difference when presenting mature procurement and asset management data to CXOs? This keynote session deals with real-life high level data reporting and presentation techniques that cover both what management demands today and what they will need in the foreseeable future.



*Pat Cicala,
President and CEO
Cicala & Associates*

Gartner Keynotes

The Challenges That Threaten the Future of IT: What IT Finance, Procurement and Asset Management Can Do About It

The evolution of SaaS, cloud computing and business process outsourcing is creating an environment that allows IT customers to bypass IT departments and lets external providers stack the deck against the internal organization. How should you respond to this growing trend? This presentation explores the role that IT finance, asset management and procurement departments have in preparing IT organizations for the future direction of business customers.



*William Snyder,
Research
Vice President*

Hot Topic Keynote Session

We're evaluating your responses to our poll to determine what the hottest topic will be. Visit gartner.com/us/itam now to let us know your key issues.

Gartner Town Hall Session and Conference Wrap-up

This session gives attendees the opportunity to ask the analyst panel follow-up questions at the end of the summit, and to provide the analysts with input for future research focus. The session concludes with highlights of the most important themes and concepts raised during the conference, and summarizes the key action items and recommendations. A perennially popular session at this summit, expect lively interactions between you, your peers and Gartner analysts.

Meet the Gartner Analysts

For more than 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 60,000 clients across the globe.



Patricia Adams
Research Director

Focus Area: IT management; enterprise management



Phil Allega
Research
Vice President

Focus Area: Processes and deliverables that integrate enterprise architecture; enterprise program management; governance; IT portfolio management; IT strategy and planning



John Bace
Research
Vice President

Focus Area: Regulatory compliance and e-discovery



Stewart Buchanan
Research Director

Focus Area: Software licensing terms and conditions; pricing structures; license management and software contract negotiations; IT asset management and virtualization; data storage; cost management and chargeback



Mike Chuba
Research
Vice President

Focus Area: Servers and storage



Frank DeSalvo
Research Director

Focus Area: IT management; IT watch



Jane Disbrow
Research
Vice President

Focus Area: IT management; IT watch; IT asset management



Jack Heine
Research
Vice President

Focus Area: IT management; financial justification



Andy Kyte
Vice President and
Gartner Fellow

Focus Area: Challenges facing CIOs and business management teams in maximizing the return on assets for the application portfolio



Mark Margevicius
Research
Vice President

Focus Area: End-user computing with a primary focus on PC desktop, notebook and server-based computing



Richard Ni
Research Director

Focus Area: IT management; IT asset management



Frances O'Brien
Research
Vice President

Focus Area: IT management; IT watch; IT asset management



Kurt Potter
Research Director

Focus Area: IT services and outsourcing; IT watch



Mike Silver
Vice President and
Distinguished Analyst

Focus Area: Client operating systems; office productivity suites; Windows and office migrations; desktop management software; total cost of ownership issues



Michael Smith
Research
Vice President

Focus Area: Development of business performance frameworks and methodologies to help organizations evaluate and align IT-enabled business initiatives



William Snyder
Research
Vice President

Focus Area: IT management; IT watch; IT management strategy



Peter Wesche
Research Director

Focus Area: IT management; IT watch



Debbie Wilson
Research Director

Focus Area: ERB; supply chain management

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 targeted advice on your ITAM concerns and issues.

Four Powerful Tracks

Summit tracks

We've surveyed you and your colleagues in IT finance, procurement and asset management for critical input on what matters most. Our response: an intensive, action-oriented agenda that helps you optimize IT costs, align short-term results with long-term strategy and position your organization for recovery.

A

Financial Management of IT

IT financial management is a critical discipline at all times, but never more important than in today's environment. This track focuses on the key areas that IT finance needs to understand to optimize long-term costs, and to become a more efficient IT services organization.

B

Best Practices in IT Procurement

In these challenging economic times, maximizing IT procurement efforts is of primary importance to IT organizations. This track provides best practices in IT procurement strategies, practices, tools and negotiation techniques.

C

Asset Management and Optimization

IT asset management is a key enabler that helps companies gain control of IT assets and their associated costs. Simply put, good ITAM can save you money and help optimize the performance of IT assets in your enterprise.

D

Future Trends in Information Technology

Changes in the world of technology carry a significant and long-term impact to IT assets and costs. In order to succeed, asset managers need a thorough understanding about how new technologies, procurement, delivery models and emerging legislation may impact their future costs, as well as how the latest developments and trends will impact their ITAM practices.

Foundational sessions

Laying a solid foundation is essential to future success. Set the stage by learning the basics of contract negotiation, ITAM standards and frameworks, going green, surviving an audit and more.

Advanced sessions

These sessions move beyond the basics into subjects that will advance you and your organization. Sessions include learning hardball negotiating tactics, understanding the cloud investment, what you need to know about PC virtualization, the nuances of packaged applications and client computing TCO.

For complete session descriptions, go to gartner.com/us/itam.

Build an Agenda That Works for You

New this year! Recommended agendas

This year, we're offering recommended agendas tailored to your specific roles and initiatives—13 agendas in all. For each time slot within the conference schedule, we've recommended sessions relevant to your on-the-job needs. Take a look!

Recommended agendas by role

It's a given that IT managers and leaders often rotate in and out of different technology roles within an organization. Often, though, some of these roles require a more in-depth understanding of IT finance, beyond what was learned in school. These recommended role-based agendas focus on the fundamental concepts behind IT finance, procurement and asset management and are designed to bring your key technologists up to speed on the most advanced techniques for optimizing IT costs. Agendas are designed for the following roles:

- Applications manager
- Enterprise architect
- Technology manager
- IT auditor
- IT CFO and controller
- IT procurement leader
- Project manager

Recommended agendas by initiative

Technology organizations have often focused on delivering solutions to customers, with cost concerns initially taking a back seat. But inevitably, these concerns do enter the discussion, resulting in initiatives that seek to justify costs, reduce them or do both. These agendas are designed around the most common financial initiatives that Gartner has observed with clients. Our objective is to encourage you to take the right actions in key areas. Agendas have been developed for the following initiatives:

- Cost modeling
- Cost optimization
- Data center consolidation
- IT leaders financial training
- IT leaders procurement training
- IT strategy development



View these agendas online with our convenient online Agenda Builder tool. Go to gartner.com/us/itam.

Agenda at a Glance

To see complete session descriptions, visit gartner.com/us/itam.

Sunday, November 8

3:00 p.m.	Preregistration			See page 6 for details on Foundational and Advanced sessions.
4:00 p.m.	T1. Survive a Software Audit: Avoid Surprises and Costs <i>Frank DeSalvo</i> ■	T2. Basic Negotiation of Contracts <i>Jane Disbrow</i> ■	MT1.* The Principles of Application Consolidation <i>Jane Disbrow</i> ■	
5:15 p.m.	T3. Build an Effective Procurement Organization <i>Richard Ni</i> ■	MT2.* Client Computing TCO <i>Mike Silver</i> ■	MT3.* Performance Management Evolution and Maturity <i>Kurt Potter</i> ■	

Monday, November 9

	Track A: Financial Management of IT	Track B: Best Practices in IT Procurement	Track C: IT Asset Management and Optimization	Track D: Future Trends in Information Technology
7:00 a.m.	Registration and Breakfast			
8:00 a.m.	Welcome Address			
8:30 a.m.	K1. Gartner Opening Keynote: The Challenges That Threaten the Future of IT and What IT Finance, Procurement and Asset Management Can Do About It <i>William Snyder</i>			
9:45 a.m.	A1. Best Practices for Applying 'Lean' in IT <i>Michael Smith</i> ■	B1. Negotiating With Oracle <i>Jane Disbrow</i> ■	C1. IT Asset Management: Trends, Tools and Best Practices <i>Patricia Adams</i> ■	D1. Is Open Source the Only Software We Can Afford to Run in a Cloud? <i>Stewart Buchanan</i> ■
11:00 a.m.	A2. Financial Management: How Enterprise Architecture Underpins Current and Future-State Planning and Results <i>Phil Allega</i> ■	B2. Top 10 Hardball Negotiating Tactics for Difficult Vendors <i>Stewart Buchanan</i> ■	C2. Selecting and Applying ITAM Standards and Frameworks <i>Frances O'Brien</i> ■	D2. Windows and Office—Charting Your Course and Costs <i>Mike Silver</i> ■
12:00 p.m.	Attendee Lunch and Solution Showcase Dessert Reception			
2:00 p.m.	A3. End-User Case Study	B3. End-User Case Study	C3. End-User Case Study	D3. End-User Case Study
3:15 p.m.	Solution Provider Sessions and Case Studies			
4:30 p.m.	A4. How IT Leaders Can Meet the Challenges of Budget Uncertainty <i>Kurt Potter</i> ■	B4. Consider Value for Money as the Driving Force in Your Vendor Negotiations <i>Peter Wesche</i> ■	C4. Strategies for Server Cost Optimization <i>Mike Chuba</i> ■	D4. The Convergence of ITAM/EAM/IWMS—Myth or Reality? <i>Jack Heine</i> ■
5:30 p.m.	Solution Showcase Reception			

Tuesday, November 10

7:00 a.m.	Registration			
7:30 a.m.	Breakfast: With the Analysts			
8:30 a.m.	K2. Keynote: Adam Smith and Technology—Who Is the Winner? <i>P.J. O'Rourke, Political Satirist and Best-Selling Author</i>			
9:45 a.m.	K3. Keynote: CXO Reporting—What They Want and What You Need to Give It to Them <i>Pat Cicala, President and CEO, Cicala & Associates</i>			
11:00 a.m.	A5. Application Customization: The Cost That Keeps On Costing <i>Andy Kyte</i> ■	B5. Negotiating With Microsoft <i>Frances O'Brien</i> ■	C5. PC Virtualization Comes of Age, and in Many Forms <i>Mark Margevicius</i> ■	D5. How to Save Money and Reduce Risk While Preparing for Litigation <i>John Bace</i> ■
12:00 p.m.	Attendee Lunch and Solution Showcase Dessert Reception			
2:00 p.m.	Solution Provider Sessions and Case Studies			
3:15 p.m.	A6. Making IT Costs More Flexible <i>Michael Smith</i> ■	B6. Taming IT Agreements With an Enterprise Contract Management Application <i>Debbie Wilson</i> ■	C6. Getting More Value From Value-Added Resellers <i>Jack Heine</i> ■	D6. Future Trends in Software Licensing: Disruptions in the Force <i>William Snyder</i> ■
4:30 p.m.	Solution Provider Sessions and Case Studies			
6:15 p.m.	Sponsor Hospitality Suites			

Wednesday, November 11

7:00 a.m.	Breakfast: Birds of a Feather			
8:00 a.m.	K4. General Session: Hot Topic Session			
9:15 a.m.	A7. Building a Cloud Investment Management Team <i>William Snyder</i> ■	B7. Software Terms and Conditions <i>Jane Disbrow</i> ■	C7. Audits, BSM, CMDB, Green IT, Virtualization, Oh My! What Can ITAM Do to Help? <i>Patricia Adams</i> ■	D7. Hosted Virtual Desktops: Issues, Implementations and Infrastructure <i>Mark Margevicius</i> ■
11:15 a.m.	A8. Chargeback Excellence: Top 10 Obstacles and Strategies for Success <i>Kurt Potter</i> ■	B8. E-Sourcing in IT <i>Debbie Wilson</i> ■	C8. Go Green to Get Green <i>Jack Heine</i> ■	D8. Software Licensing: The Childhood Ends <i>John Bace</i> ■
12:15 p.m.	Attendee Lunch			
1:15 p.m.	A9. IT's Not All About Finances—Qualitative Techniques to Improve IT Planning and Allocations <i>Phil Allega</i> ■	B9. Advance Your Procurement Organizational Performance <i>Richard Ni</i> ■	C9. Optimizing Hardware and Software Investments in the IBM Mainframe Platform <i>Mike Chuba</i> ■	D9. Future Shock: Factors That Will Change the Face of IT <i>Jack Heine</i>
2:30 p.m.	K5. Gartner Town Hall Session and Conference Wrap-up			

Key: ■ = Cost Optimization ■ = Foundational Sessions ■ = Advanced Sessions ■ = Masters Level Tutorials
Agenda as of August 4, 2009, and subject to change. Visit gartner.com/us/itam for updates.

Benefits by role

IT finance

- See how to collaborate with business partners to meet cost, expense and productivity expectations.
- Gain best practices for applying “lean” IT.
- Get a better understanding of the delivery models that can make IT costs more flexible, from SaaS to cloud computing.
- Identify the top 10 obstacles to achieving chargeback excellence.
- Discover qualitative techniques to improve IT planning and allocations.

IT procurement

- Learn techniques for negotiating with Oracle and Microsoft.
- Discover the top 10 hardball negotiating tactics for difficult vendors.
- Know when to consider value for money as the driving force in your vendor negotiations.
- See how and why to tame your IT agreements with an enterprise contract management application.
- Advance your procurement organizational performance.
- Optimize the effectiveness of your IT enterprise.
- When to utilize/leverage e-sourcing solutions.

IT asset management

- See how to select and apply ITAM standards and frameworks.
- Gain important insight on PC virtualization.
- Get more bang for your buck from value-added resellers.
- Maximize the return on your IBM mainframe investment.
- Implement asset management best practices and business processes.
- Improve the management of IT asset life cycles.

Who should attend?

IT professionals involved in any phase of asset management, including:

- IT financial managers
- Procurement managers
- Financial managers
- IT controllers
- IT CFOs
- CIOs interested in IT financial dynamics
- Technology managers with budgetary responsibility
- Asset managers
- Managers working in resource budgeting, finance, software licensing, contract negotiations, service management or strategic planning
- Procurement specialists
- Negotiating staff
- Contract administrators and legal staff
- Vendors involved in IT asset management tools and services



Session Descriptions

Keynotes

K1. Gartner Opening Keynote: The Challenges That Threaten the Future of IT—and What IT Finance, Procurement and Asset Management Can Do About It

The forces at work in the world of technology create a challenging situation for IT organizations. The evolution of SaaS, cloud computing and business process outsourcing set up an environment that allows IT customers to bypass IT departments, which then allows these external providers to stack the deck against internal IT organizations. Understanding the finances of IT is pivotal to positioning IT as a partner in both internal and external discussions, ensuring the decision is the optimal long-term decision, rather than just an expedient solution. This presentation explores the role that IT finance, asset management and procurement departments have in preparing IT organizations for the future direction of business customers.

William Snyder, Research Vice President

K2. Adam Smith and Technology: Who Is the Winner?

America's leading political satirist and the best-selling author of 12 books, Mr. O'Rourke provides his unique, amusing perspective on how technology has revolutionized the world ... or not. But what would Adam Smith think about the information age and the seemingly endless obsolescence? Join us as Mr. O'Rourke discusses the intersection of the pioneer of economics and today's technology in a most humorous manner.

PJ O'Rourke, Best-Selling Author and Leading Political Satirist

K3. CXO Reporting: What They Want and What You Need to Give to Them

Organizing mature IT financial and asset data to facilitate better business decisions is invaluable. Everyone has reports, but what do you need to think about to make a difference when presenting mature procurement and asset management data to CXOs? This keynote deals with real-life high-level data reporting and presentation techniques that cover both what management demands today and what they will need in the foreseeable future.

Pat Cicala, President and CEO, Cicala & Associates

K4. Gartner Keynote—Hot Topic Session

K5. Gartner Town Hall Session and Conference Wrap-Up

This session provides the opportunity for the audience to ask the analyst panel their remaining questions, and provide input for future research focus. The session concludes by highlighting the most important themes and concepts raised during the conference, and summarizing the key action items and recommendations.

Track A: Financial Management of IT

A1. Best Practices for Applying 'Lean' in IT

Lean is a technique that has been proven in manufacturing, and is now beginning to be applied in IT. Although lean involves many tools and practices, the underlying driver is the organization's ability to continuously develop, coordinate and motivate its staff to create value for its customers, while coping more effectively than any of its competitors with accelerating global change. This session will explain lean and its implications for IT, and examine the challenges of transitioning to lean and best practices for getting started.

- What is lean and what are its implications for IT?
- How should the transition to lean be managed and led?
- Which lean practices should be selected and adapted to IT to deliver improved performance?

Michael Smith, Research Vice President

A2. Financial Management: How Enterprise Architecture Underpins Current and Future-State Planning and Results

Most investment decision makers consider time, money and people to be the primary financial management elements. With enterprise architecture underpinning financial management, risks concerning the future state impact on today's investments are highlighted for work that's both planned and in progress.

- What do leading EA practitioners focus on within the business?
- In what ways should you reverse your heritage thinking about what enterprise architects do?
- What are the hot EA techniques that support CEOs and CFOs?

Philip Allega, Research Vice President

A4. How IT Leaders Can Meet the Challenges of Budget Uncertainty

The best IT leaders in large and small organizations will be challenged by the pressures put upon their IT budgets due to economic uncertainty. Some organizations will cut costs across the board, some will optimize their IT environments, and others will have limited ability to cut anything at all without changing the way the work is done. Once IT organizations cycle through the typical cost-savings measures, the hard work of collaboration with business partners to meet cost, expense and productivity expectations in the face of new business demands begins. For some IT organizations, this will mean switching gears from delivering world-class IT services to being a cost leader in their industry, where service levels are changed to set expectations in times of austerity.

- What is the Gartner Framework for Cost Optimization and how should IT leaders use it to make cost-savings decisions?
- What are the best practices for cost savings within IT, IT procurement and joint business/IT cost savings?
- How can IT organizations prioritize the areas that offer the largest cost-savings to the enterprise, and how does this relate to risk and time-to-benefit?

Kurt Potter, Research Director

Session Descriptions

A5. Application Customization: The Cost That Keeps On Costing

Heavily customized large packaged applications threaten to become the legacy systems of the next decade. Management teams dealing with an existing application portfolio with substantial customization need to learn how to manage them more effectively. Anyone contemplating the implementation of a new packaged application needs policies to avoid the problems of the past. Both IT and the business will benefit from attending this session.

- How can packaged applications be adapted to suit the specific needs of an individual business?
- How should an application implementation team manage the customization of a packaged application?
- How should existing customized packaged applications be managed to deliver value in the long term?

Andy Kyte, Research Vice President and Gartner Fellow

A6. Making IT Costs More Flexible

The economic downturn made the need for IT cost flexibility clear, as organizations were required to quickly shift resources from capital expenditures to day-to-day business operations. Going forward, delivery models like SaaS and cloud computing promise to make IT costs more flexible, but there are many unknowns here. This session will explore how and when IT organizations can become more flexible in terms of their cost structure, as well as the risks and costs of doing this.

- What does it mean to be flexible in terms of IT costs, and when is it of greatest value to the enterprise?
- What are the costs and risks of greater flexibility?
- How can IT organizations become more flexible in terms of cost?

Michael Smith, Research Vice President

A7. Building a Cloud Investment Management Team

The decisions made at the onset of cloud computing will determine how restrictive vendors will be in the long term. Costs, transition issues and modeling require a far-sighted management approach before the theoretical becomes reality. This session identifies the commercial challenges that cloud computing presents, and provides guidance on structuring a cloud investment management team.

- How does the cloud environment differ from traditional methods of IT delivery?
- What are the biggest commercial exposures that enterprises face in moving to the cloud environment?
- Who should be included in the cross-organizational team to ensure key members are included in the development?

William Snyder, Research Vice President

Session Descriptions

A8. Chargeback Excellence: Top 10 Obstacles and Strategies for Success

Chargeback and cost optimization seem to be a work in progress for many IT leaders. The stakeholders and politics seem to inhibit doing what's right for the enterprise. The economic downturn has forced many IT organizations to shake up their chargeback systems, and many had moderate success that would not have been the case in normal days. The obstacles for success still persist and new requirements for visibility into the IT cost structure will frustrate the best intentions of the IT organization.

- What are the top obstacles for chargeback excellence, and how can IT leaders overcome these obstacles?
- How can chargebacks be leveraged to promote and accommodate future requirements for cost transparency?
- What are the options for IT organizations that cannot or will not implement chargeback practices?

Kurt Potter, Research Director

A9. IT's Not All About Finances—Qualitative Techniques to Improve IT Planning and Allocations

Value is derived from many quarters, not just from ROI, internal rate of review or economic value added. Perception and politics can play critical roles in managing where monies are allocated, or not. Learning how and when to use such techniques, processes and visualizations helps manage the qualitative side of maximizing budget allocations.

- How can you link demand planning to strategic capability requirements?
- How can you create portfolio management that maximizes allocation against perceptions?
- How can you communicate the net impact of choices over time and location?

Philip Allega, Research Vice President

Track B: Best Practices in IT Procurement

B1. Negotiating With Oracle

Due to Oracle's many acquisitions, even if you have never negotiated with Oracle, you may be doing so in the near future. This session will help you understand some of Oracle's license models, business practices, risk areas and negotiating levers that will help you negotiate more effectively with Oracle.

- What are the basics you should know about negotiating with Oracle?
- What are the license models for both applications and database products that Oracle is offering customers?
- Where are the areas of contract risk in an Oracle agreement?

Jane Disbrow, Research Vice President

B2. Top 10 Hardball Negotiating Tactics for Difficult Vendors

Customers sometimes complain that vendors use aggressive hardball tactics against them. Now you can turn the tables by using these simple but effective techniques. Please use them appropriately and responsibly or they might do lasting damage to your market reputation as a customer.

- When should you consider hardball negotiation tactics and what are the risks and rewards of playing win/lose?
- How can you make the vendor understand you mean business and that they have pushed you too far?
- What steps can you take to redress the imbalance and give your vendor their last chance to win you back?

Stewart Buchanan, Research Director

Session Descriptions

B4. Consider Value for Money as the Driving Force in Your Vendor Negotiations

Today's economic climate shows increased tension among buyers and vendors. Nervousness about cost and margins have turned into a weapons race, but should be addressed via a road map that will deliver crucial compromises but also be a platform for sustained delivery of value. To get on equal footing with your megavendor requires a self-confident, fact-based and historically proven set of arguments that cannot be denied and helps support commercial targets on both sides.

- What is the Gartner Framework for Cost Optimization and how should IT leaders use this to make cost-savings decisions?
- What are the best practices for cost savings within IT, procurement and joint business /IT cost savings?
- How can IT organizations prioritize the areas of largest cost-savings benefits to the enterprise and how does this relate to risk and time to benefit?

Peter Wesche, Research Director

B5. Negotiating with Microsoft

Good Microsoft software deals will go to those organizations that prepare thoroughly and start the formal negotiation with a specific agenda and ground rules for the negotiation process. Decisions made today will have implications that will ripple throughout your organization for years to come. This, in turn, could impact the performance of those software assets in your environment.

- How will changes to Microsoft's software licensing practices affect your licensing costs?
- What are the critical success factors for structuring a good deal?
- What issues will you face when negotiating with Microsoft?

Frances O'Brien, Research Vice President

B6. Taming IT Agreements With an Enterprise Contract Management Application

Do your IT contracts get lost or stuck on someone's desk during the negotiation process? Are beautifully conceived agreements filed in someone's drawer or posted at the header level only on an Excel spreadsheet, never again to see the light of day? Do your contracts automatically renew before you've had the chance to renegotiate them or consider alternatives? If you answered yes to any of these questions, this is a must-attend session.

- When and how do organizations deploy enterprise contract management solutions?
- How similar are IT contracts to other common contract types?
- What are best practices for contract management application implementation?

Debbie Wilson, Research Director

B7. Software Terms and Conditions

Many software agreements contain problematic clauses that are often not recognized as being high risk. This session will point out the areas where Gartner has seen the highest levels of risk, and discuss how to improve on the risk areas to reduce unexpected cost. This session will not be a legal review, but will focus on the business terms and conditions that often cause problems.

- What are the primary areas of risk in a software license agreement?
- What are some examples of contract language risks and what can be negotiated in the contract to reduce the risk?

Jane Disbrow, Research Vice President

Session Descriptions

B8. E-Sourcing in IT

E-sourcing technologies, from tactical request-for-quotation tools and project-oriented strategic sourcing applications to reverse auction services, are increasingly mature, widely adopted technologies in larger enterprise for all cost categories. IT supports these tools, of course, but when, if ever should IT use e-sourcing solutions for IT supplier selection and contract negotiation?

- What is e-sourcing?
- How are e-sourcing tools typically deployed in an organization?
- Is it ever appropriate to use reverse auctions in IT?

Debbie Wilson, Research Director

B9. Advance Your Procurement Organizational Performance

A high performing procurement function delivers real tangible commercial value to organizations. The current challenging economic environment represents great opportunities for those procurement functions with strong performances to expand its influence and impact. IT procurement leaders and managers should take a holistic approach when embarking on procurement performance enhancement initiatives.

- How can you measure the procurement function value contribution?
- What are some of the key challenges for procurement and how can you overcome them?
- How can procurement demonstrate value in the current economic challenging environment?

Richard Ni, Research Director

Track C: IT Asset Management and Optimization

C1. IT Asset Management: Trends, Tools and Best Practices

IT operations has been on a continuous journey toward improving its maturity by aligning the people, processes and technology with the business needs. Achieving improved maturity under constant pressures of cost and business change is not trivial. As a result, many organizations have embraced or are beginning to embrace IT asset management as a means of optimizing costs while supporting the goal of operational excellence and providing visibility into the financial management of the IT assets. This session provides insight on the key factors that need to be in place to achieve IT asset management maturity and support the demands of ancillary IT service management processes.

- What business pressures are driving IT asset management discipline?
- Which vendors, products and technologies will shape the IT asset management market?
- What best practices should be adopted to improve efficiency, reduce operational costs and align with the business?

Patricia Adams, Research Director

C2. Selecting and Applying ITAM Standards and Frameworks

Various industry standards and control frameworks are useful to guide IT asset management programs, but not all are applicable and not all are practical. Which standards are most appropriate to align with IT asset management and optimize out IT investments?

- What standards and frameworks are there?
- Which standard and frameworks are applicable to my organization?
- How should I select and apply standards and frameworks?

Frances O'Brien, Research Vice President

Session Descriptions

C4. Strategies for Server Cost Optimization

This session looks at tactics and strategies to both reduce costs associated with server acquisition, deployment and life cycle, as well as ways to optimize and get better bang for what you are spending. Recommendations will run the gamut from low-end servers up through high-end mainframes.

- How can users reduce their spending now in their server environment?
- What are best practice negotiation tactics and asset management strategies for servers?
- What strategies can users employ to optimize server spending in future years?

Mike Chuba, Research Vice President

C5. PC Virtualization Comes of Age, and in Many Forms

PC virtualization is now wrapped in hardware, operating systems, applications, data and user information. The landscapes for these technologies is in flux, and are equally confusing. We offer guidance as to which solutions work best and for which scenarios.

- What do virtualization technologies do, and why should you care?
- How will the use of virtualization technologies in client computing evolve through 2012?
- What are the best practices for deploying and managing virtualization technologies in end-user devices?

Mark Margevicius, Research Vice President

C6. Getting More Value From Value-Added Resellers

In tough economic times, IT organizations need to determine where opportunities exist to leverage value found in new and existing contracts with value-added resellers (VARs). Often these vendors are willing to provide additional services for little or no additional cost in order to secure business. This session explores where those opportunities may lie and how to negotiate with VARs to optimize their added value in securing goods and services.

- What are the typical value-added services available from the VAR community?
- Why do organizations often fail to pursue leveraging VAR capabilities?

Jack Heine, Research Vice President

C7. Audits, BSM, CMDB, Green IT, Virtualization, Oh My! What Can ITAM Do to Help?

Software audits by vendors of all shapes and sizes are unquestionably on the rise. IT organizations are trying to align with the needs of the business by implementing business service management. Companies that are following ITIL have CMDB on their must-do list. Every company that wants to jump on the “green” bandwagon, is looking for ways to use their assets more efficiently. And virtualization of data center software is growing exponentially. If your organization is focused on one or all of the above mentioned projects you should attend this session. We explore the technologies that are impacting IT operations and delve into the ways ITAM can support these projects.

- What are the macro trends and technologies that are impacting IT asset management?
- How can IT asset management provide data to support highly visible key initiatives?
- What are the tactical and strategic steps that can be taken to support these key projects?

Patricia Adams, Research Director

Session Descriptions

C8. Go Green to Get Green

Green IT has numerous facets of environmental impact from acquisition and operations to disposal. However, looking at going green as being a cost may be an error, as improvements to energy efficiency now enjoy positive ROI, timely resale of equipment can net positive returns and corporate endorsement of sustainability has an increasing positive public relations impact. Today going green simply makes good business sense.

- What are the issues that make up the landscape of going green?
- Why is asset disposal becoming such a significant issue?
- What are the policies, procedures and processes that need to be addressed as IT goes green?

Jack Heine, Research Vice President

C9. Optimizing Hardware and Software Investments in the IBM Mainframe Platform

Many organizations continue to invest significant sums in their IBM mainframe environment. Yet issues such as software pricing and the looming skills “crisis” continue to be raised as reasons that for some, further investment needs to be curtailed. This session provides both a current and future snapshot into IBM’s strategies with its mainframe platform, what role the mainframe might play within an organization’s portfolio of servers, and what tactics and strategies IT asset managers can employ to get the maximum return on their mainframe investment.

- What is the short- and long-term future of the IBM mainframe?
- What are the best practices in negotiating with the mainframe software vendors?
- What should your biggest concerns be going forward and how can you best address them?

Mike Chuba, Research Vice President

Track D: Future Trends in Information Technology

D1. Is Open Source the Only Software We Can Afford to Run in a Cloud?

Gathering clouds signal stormy weather. As customers are starting to worry about their software strategies and application architectures, cloud computing approaches are becoming increasingly synonymous with open source software. Are traditional software vendors at risk of cooking the goose that lays their golden eggs or should the users be worried?

- What are licensing metrics and why are these pivotal issues for the future of the data center?
- Are virtual processors workable as a licensing metric and why do so few vendors offer this option?
- Now virtualization has spread to the desktop, what can we do to stop the same problem repeating itself?

Stewart Buchanan, Research Director

D2. Windows and Office—Charting Your Course and Costs

Microsoft’s Windows Vista was less than successful and many enterprises decided to skip it. But you can’t run Windows XP forever, and with Office 2007 migrations progressing, do you upgrade, wait for Office 2010, or go to open source? We examine the risks, costs and timelines for updating your client software.

- What are the features and benefits of new versions of Windows and Office?
- How long can you run your current software and what are your options, including those from vendors other than Microsoft?
- What is the future of client computing software?

Mike Silver, Research Vice President and Distinguished Analyst

Session Descriptions

D4. The Convergence of ITAM/EAM/IWMS: Myth or Reality?

Increasingly the incorporation of computing technologies in non-IT equipment and facilities is causing conflicts with IT, facilities and engineering regarding specifications, acquisition and maintenance of these computerized assets. This presentation addresses the range of futuristic conflicts and offers potential organizational alignment policies to address this dilemma.

- What trends in IT and non-IT computerized assets will drive support convergence?
- What organizational issues must be faced regarding convergence?
- What is the perspective of the vendor community regarding tools and assumed organizational support to address the convergence issue?

Business value: Today, investments in facilities account for the second largest corporate expenditure, just behind labor costs. The inability to effectively incorporate and support increasing computerization of facilities and engineering assets due to organizational conflicts between IT, facilities and engineering will severely impact the ROI anticipated from these traditional non-IT investments.

Jack Heine, Research Vice President

D5. How to Save Money and Reduce Risk While Preparing for Litigation

This presentation will enable you to make the long and very expensive story of litigation at your company shorter and less expensive. By selecting the right technology for e-discovery and by tying that to an information life-cycle management strategy, you can save your company a ton of money and your IT department a ton of time.

- Who in IT has e-discovery and information retention management responsibility?
- What are the costs and risks associated with ad hoc e-discovery and undisciplined information management?
- How can you use process discipline, e-discovery products and services to cost effectively manage e-discovery inside your company today?

John Bace, Research Vice President

D6. Future Trends in Software Licensing: Disruptions in the Force

The world of IT continues to evolve, yet there are real threats to the established power structure of software licensing. At the same time, the consolidating field of software vendors is creating problems for IT organizations. This presentation looks at what forces are in play that are pressuring software vendors and the emerging trends that will have an impact on software margins, customer costs and the balance of power between customers and vendors.

- What forces are in play that pressure software vendors?
- What trends will shift the buyer/supplier dynamics in software purchasing in the next five to 10 years?
- What are the trends that will shape the way that software will be licensed and priced through 2012?

William Snyder, Research Vice President

Session Descriptions

D7. Hosted Virtual Desktops: Issues, Implementations and Infrastructure

Centralizing the desktop using hosted virtual desktops in the data center is perhaps the hottest trend in client computing. We cut through the hype, discuss the technology, and share customer implementations and best practices to help identify whether it's right for you.

- What are the technical, practical and financial considerations that organizations need to be concerned with?
- Where are the technologies (and their alternatives) today, and where are they headed through 2013?
- What are customers doing with HVD today?

Mark Margevicius, Research Vice President

D8. Software Licensing: The Childhood Ends

In mid-2006, the Gartner research report "Childhood Ends" predicted that either governmental or industry self-regulation of IT products and services was likely by 2015. Recent events lead us to believe that this prediction was conservative, and we now anticipate governmental regulation of parts of the industry within a few years. This presentation describes the forms we expect regulation to take, the potential impacts on users and vendors, and the imperative must-dos for all players.

- How will regulation of the IT industry evolve in the next five years?
- What should technology providers and end-users do to prepare for regulation of the IT industry?

John Bace, Research Vice President

D9. Future Shock: Factors That Will Change the Face of IT

This forum-type session explores the impact of potential radical changes associated with technology, workforce composition, environmental legislation and economics. A series of slides on high-impact topics will lead off a series of discussions. Participants will be asked to comment on materials presented and their view of potential impacts to their organization.

- How must ITAM address policy issues related to personally owned multi-functional mobile devices that are also used for work?
- Is the work-at-home paradigm the wave of the future?
- What organizational changes can we expect in IT over the next five years? Ten years?

Jack Heine, Research Vice President

Solution Showcase

Consider all the options before making your important buying decisions. Our Solution Showcase is a great place to follow up on the information you've gathered at solution provider or Gartner-analyst-led sessions.

- Access the world's leading solution providers.
- Discuss your ITAM challenges in detail.
- Become more informed on the latest products and services via turnkey exhibits.
- Engage a solution provider who can address your requirements.
- Walk away with a shortlist of vendors who meet your needs.

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