

NEW role-based  
agenda inside

# Gartner Customer Relationship Management Summit 2009

Never Let a Good Crisis Go To Waste



## Special role-based agenda for:

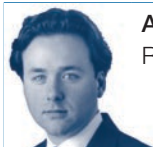
- Sales & Marketing Executives
- Business & IT Strategists
- Business Analysts
- Customer Service & Contact Center Managers
- Customer-Centric Web Strategists & Technologists

Your very own action plan for CRM innovation

### Conference Co-Chairs



**Gareth Herschel**  
Research Director



**Adam Sarner**  
Research Director

**Gartner**  
Customer Relationship  
Management  
Summit 2009

### Early-Bird Savings

Register by July 31 and save \$200.

September 14 – 16  
Scottsdale, Arizona  
[gartner.com/us/crm](http://gartner.com/us/crm)

Dear Colleague:

Today's economy may threaten your budgets and resources, but it also opens up great opportunities for innovation. Sound counterintuitive? It's not.

Technological and cultural disruptions have been the norm for quite some time. With increasing regularity, they've been challenging your relationship with your most important asset—your customers—and the way your organization acquires, retains and engages them.

But with crisis comes opportunity—the opportunity to jettison failing programs and embrace the kinds of CRM strategies that can successfully address disruption, lead to long-term profitability and exceed the interests of your customer.

Keep in mind that innovation isn't a switch you can just turn on. Rather, it's the driving force behind choosing vital change over complacency. Ultimately, it lays the foundation for the competitive advantage you'll need to position your organization for recovery. The Gartner Customer Relationship Management Summit will help you capitalize on this opportunity.

Whether you're on the business or IT side of the organization, our focus is on working with you to identify resourceful and innovative uses of technology to enhance agility, enrich customer relationships and drive market growth.

Now's the time to take action and jolt your organization out of its comfort zone to reach higher levels of customer-focused innovation. Learn how to embed the right analytics into your processes, master the rules of online engagement, discover customer intimacy through automation and much more.

Register today at [gartner.com/us/crm](http://gartner.com/us/crm).



Gareth Herschel  
Research Director & Co-Chair



Adam Sarner  
Research Director & Co-Chair

P.S. See our all-new, role-based agenda designed for CRM professionals across the business and IT spectrum. Whether you're a Web technologist, sales executive, marketing professional or contact center manager, we have the specific content you need. See pages 8 – 9 for details.

## Hot Topics:

- Business Intelligence Tools for CRM
- Creating a Single View of the Customer
- The Role of Innovation in CRM
- CRM Business Value and Justifying CRM Investments
- CRM Metrics
- Organizational and Cultural Changes for CRM Success
- Social CRM
- Customer Self-Service
- Emerging Technologies for CRM
- Customer Service Metrics and Reporting
- Customer Value Analysis
- New Web Technologies to Build and Serve Customers
- Customer Feedback Management
- CRM Project Management Best Practices
- Generation Virtual

## Why attend?

Because value-added innovation starts here, and it starts now. Gain a new sense of urgency on how to significantly improve CRM across the enterprise. By the end of this conference, you'll be optimistic about what you can accomplish and ready to put what you have learned into action. In just three days, you'll have actionable solutions to persistent challenges such as:

- **Deciding** which social trends you should embrace as customers move from MySpace to Facebook to YouTube to Twitter.
- **Aligning** your people, processes, products and services around a customer experience that's consistent at all key touch points.
- **Understanding** which business intelligence technologies can significantly improve your business processes.
- **Getting** on a first-name basis with Generation Virtual and understanding their impact on your CRM strategy.
- **Delivering** a sales force automation solution that your organization actually likes and uses.
- **Building** a cost-effective contact center infrastructure without cutting corners.
- **Gaining** the insight you really need using the right Web analytics tools.
- **Optimizing** the Web site user experience without investing in new technologies.
- **Identifying** the skills, tactics and technologies to help you flourish in an online environment.

Can you really do more CRM for less? Absolutely! Learn how to get closer to your customers and embrace new ones at the Gartner Customer Relationship Management Summit.

## Who should attend

The summit agenda is designed to meet the specific needs and requirements of a variety of corresponding roles that influence customer purchasing behavior, including:

- CEOs, Vice Presidents, Directors and Project Managers
- CIOs, Chief Innovation Officers and Technology Strategists
- Web Strategists and Web Channel Managers
- CMOs, Sales and Marketing Executives
- Chief Customer Service Officers, Vice Presidents of Customer Service and Contact Center Managers
- Business Analysts
- Business and IT roles related to CRM

Match your organizational role to our conference content. Turn to page 8 and see how the agenda can meet your on-the-job, project-specific objectives.



## Gartner Opening Keynote

### The New Deal: The Advent of the Web-Centric Customer Relationship

Customer relationships must change to reflect the balance of the enterprise's intent to drive profitability and the customer's intent for higher satisfaction and convenience. The Web is a driving force for the matching of these requirements in today's business climate. This keynote will outline the impact of the Web-centric customer across all aspects of the customer relationship and the decisions that must be taken to make it happen.



*Michael Maoz  
VP & Distinguished Analyst*

## Gartner Keynote: Analytics-to-Action

### Key Analyses for Customer-Centric Decisions

Analysis can encompass a wide range of disciplines and techniques in support of stronger and more profitable customer relationships. This session will highlight the most impactful of these techniques including-real time decisions and text analytics.



*Gareth Herschel  
Research Director &  
Conference Co-Chair*

## Gartner & 1to1 Customer Awards

Gartner has joined forces with 1to1 Media on a special awards program highlighting companies that have made a big impact with their customer relationship strategies and achieved unrivaled excellence in delivering the customer experience.



Don't miss the opportunity to hear what makes the Gartner & 1to1 Customer Awards winners stand out. Get a ringside seat to these prestigious awards at a special keynote presentation to honor winners in the following categories:

- Customer strategy
- Enterprise CRM optimization
- New-media optimization
- Marketing optimization
- Organizational transformation
- Sales optimization
- Service optimization

Make sure you're there when the Gartner & 1to1 Customer Awards winners present their case studies at a special panel discussion and open Q&A.

## We're on LinkedIn!

Connect with Gartner and other CRM experts to exchange learning experiences, meet people with complementary skills and ideas, and get access to the resources you need right now to realize your CRM goals.

**Join Now:** Search LinkedIn now for the Gartner Customer Relationship Management (Xchange) group.

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.



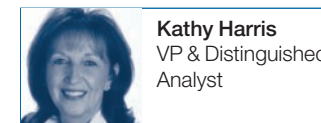
**Gene Alvarez**  
Research VP



**Jim Davies**  
Research Director



**Bill Gassman**  
Research Director



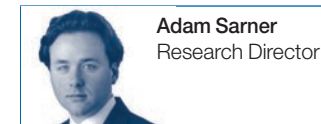
**Kathy Harris**  
VP & Distinguished Analyst



**Drew Kraus**  
Research VP



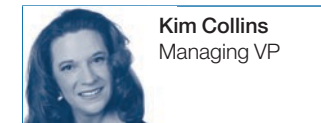
**Scott Nelson**  
Managing VP



**Adam Sarner**  
Research Director



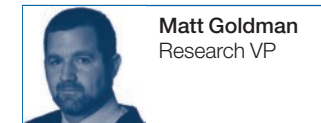
**Ed Thompson**  
VP & Distinguished Analyst



**Kim Collins**  
Managing VP



**Michael Dunne**  
Research VP



**Matt Goldman**  
Research VP



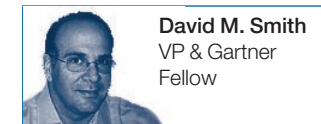
**Gareth Herschel**  
Research Director



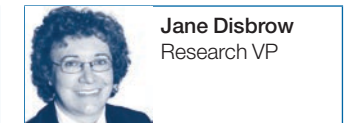
**Michael Maoz**  
VP & Distinguished Analyst



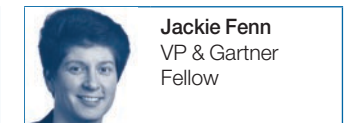
**Gene Phifer**  
Managing VP



**David M. Smith**  
VP & Gartner Fellow



**Jane Disbrow**  
Research VP



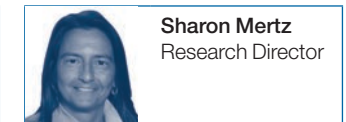
**Jackie Fenn**  
VP & Gartner Fellow



**Dale Hagemeyer**  
Research VP



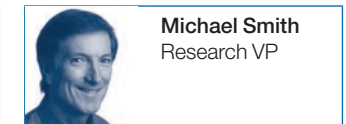
**Johan Jacobs**  
Research Director



**Sharon Mertz**  
Research Director



**John Radcliffe**  
Research VP



**Michael Smith**  
Research VP

## 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 CRM concerns and issues. Choose a Gartner analyst who specializes in your CRM area of expertise.

# Get Involved!

## Create Your Own CRM Action Plan

The 2009 Customer Relationship Management Summit takes a whole new approach with an actionable agenda specifically designed to meet the needs of key CRM roles across the organization.

Roles & Focus	Themes	Theme Descriptions	Key Challenges & Take-Aways
<b>Business Strategy</b>  (CEOs, VPs, Directors, Project Managers)	Urgency of Now	These sessions examine the planning needed for the next phase in CRM strategy, as well as key issues in understanding customers' needs within a profitable business process. Other focus areas include industries at the forefront of pioneering CRM strategies and practices.	<b>Challenge:</b> Turning crisis to your advantage.  <b>Take-away:</b> Key strategies and emerging trends for enriching customer relationships and market growth through CRM innovation.
<b>IT Strategy</b>  (CIOs, Chief Innovation Officers, Technology Strategists)	The IT Imperative: Planning for Flexibility	These sessions explore how the current economic and IT cycle challenges organizations to combine the flexibility of innovative solutions with a robust infrastructure to create high levels of system stability and performance.	<b>Challenge:</b> Which next-generation technologies support emerging trends in customer relationship management?  <b>Take-away:</b> Learn more about technologies that involve co-innovation between the business and the customer to design create and improve interactions. Gain greater value for both sides, regardless of the interaction channel.
<b>Sales &amp; Marketing</b>  (CMOs, Sales & Marketing Executives)	Communicating Value: Innovation in Sales & Marketing	Discover how new marketing technology is creating intimacy through automation, executing strategy, increasing loyalty and shaping future customer experiences that are measurable. For the sales force, new sales technology greatly increases the scope of potential prospects, closes more deals and gives salespeople more of what they actually want in a sales application.	<b>Challenge:</b> Which solutions can automate customer intimacy, increase the scope of the prospect universe and help close the deal?  <b>Take-away:</b> An in-depth view of how marketers create measurable intimacy through automation, and how companies can deploy the tools salespeople want. Gain a better understanding of current and future technologies that marketing and sales will use to drive company wide, multi-channel CRM strategy.
<b>Customer Service</b>  (Chief Customer Service Officers, VPs of Customer Service, Contact Center Managers)	Delivering Customer Intimacy Through Service Automation	These sessions explore how customer service strategies are evolving toward service differentiation to support ever-changing consumer trends. The role and scope of the multichannel contact center and Web self-service over the next five years will also be examined.	<b>Challenge:</b> Creating service predictability and flexibility for any environment. How are customer service strategies evolving in today's uncertain economic environment?  <b>Take-away:</b> See how Web-based self-service can be leveraged for economic advantage over the next five years.
<b>Customer Relationship Web Strategies &amp; Web 2.0 Technologies</b>  (Web Strategists, Web Channel Managers)	Creating Destinations for Generation Virtual	Heightened consumer expectations will force IT and the lines of business to focus on integrated, customer-centric Web strategies. Explore the business processes, technologies, and Web 2.0 applications that will make businesses more successful on the Web.	<b>Challenge:</b> Which business processes, technologies and Web 2.0 applications can create new and long-term customer value?  <b>Take-away:</b> can integrate their customer-centric Web strategies to meet today's customer expectations.
<b>CRM Analytics</b>  (Business Analysts)	Enabling Insight-Driven Strategies and Experiences	Organizations need to measure the true state of their current performance and refine their understanding and treatment of customers. These sessions discuss how to meet these needs with targeted investments in analytic applications that offer low-cost and high-impact opportunities to leverage existing investments.	<b>Challenge:</b> How can you enable insight-driven strategies?  <b>Take-away:</b> Discover the pre-requisites to establishing a solid analytic capability as well as key metrics for CRM performance.

Roles & Focus	Themes	Theme Descriptions	Key Challenges & Take-Aways
<b>Resourceful CRM</b>  (CRM Business and IT Roles)	Brother Can You Spare a CRM Project?  How to Do More CRM for Less	Even under the best-laid plans, CRM solutions have trouble demonstrating quantitative business value. These sessions provide insight on optimizing your CRM costs while maximizing existing investments, including best practices and strategies in asset procurement, vendor and resource management, end-user adoption and change, and examples of how necessity drives CRM innovation.	<b>Challenge:</b> How can you invest wisely in a difficult business environment, while optimizing costs and maximizing what's already in place?  <b>Take-away:</b> Strategies and approaches for minimizing expenses to meet the needs of the customer within the constraints of the current economic environment.
<b>Vendors and Markets</b>  (CRM Business and IT)	Making the Right Choice the First Time	These interactive sessions provide the opportunity for a deeper discussion of the vendors and markets that shape organizational use of technology as an enabler of CRM. Each will focus on a specific component of the CRM market.	<b>Challenge:</b> What's the state of the CRM market? And which vendors must you consider when making a buying decision in today's economy?  <b>Take-away:</b> Gain insight into key evaluation criteria to be used when selecting the best vendor for your CRM projects and initiatives.

## Get all this at one event

- **Customized Content:** Experience an all-new role-based agenda that targets your specific needs as an agent of CRM innovation.
- **CRM Workshop Series:** Immerse yourself in the tactics and strategies needed for customer experience management, leveraging social media, CRM metrics, mastering customer data quality, contracts and negotiations, Web analytics, using external service providers, maximizing your marketing dollars and more.
- **Independent Gartner Analysis:** Find trusted insight from the leading team of business and IT analysts.
- **Tutorials:** Complimentary preconference sessions get you up to speed on key issues and trends.
- **Analyst One-on-Ones:** Meet face-to-face with Gartner analysts for 30 minutes of personalized advice on the CRM topic of your choice.
- **Power Breakfasts:** Begin your day with newfound energy at either of these early-morning "radical" or "maverick" breakfast sessions.
- **Magic Quadrant and Vendor Review Sessions:** A variety of 15 – 30 minute presentations providing insight on the CRM marketplace and some of its most important vendor products and services.
- **Solution Provider Sessions and Case Studies:** Leading providers share best practices, strategy and offerings. End users share lessons learned from real-world implementation.
- **Solution Provider Showcase:** Kick-start your own vendor research, meet with company representatives to discuss your CRM challenges and create a shortlist of providers and solutions.
- **Hospitality Suites:** Take advantage of this great way to network informally with your summit colleagues and to kick back and relax at the end of the day.



# Agenda at a Glance

	Business Strategy	IT Strategy	Sales & Marketing	Customer Service & Contact Center
<b>Sunday, September 13</b>				
5:00 p.m.	Gartner Orientation Session			
<b>Monday, September 14</b>				
7:00 a.m.	<b>Attendee Breakfast</b>			
7:15 a.m.	T1: Pre-conference Tutorial: "Getting" Gartner: How to Understand What We Are Talking About – <i>Sharon Mertz</i>	T2: Pre-conference Tutorial: "Getting" Gartner: How Vendors Can Work Well With Analysts – <i>Matt Goldman</i>	T3: Pre-conference Tutorial: TechnoBabble 101: How to Bluff Your Way Through a SOA/SaaS/Cloud Discussion – <i>Gene Phifer</i>	
8:00 a.m.	K1a: Gartner Opening Remarks: The Urgency of Now: <i>Gareth Hershel, Adam Sarner</i>			
8:15 a.m.	<b>K1b: Gartner Opening Keynote: The New Deal – The Advent of the Web-Centric Customer Relationship</b>			
9:30 a.m.	G1: The Importance of the Customer Experience in a Recession – <i>Ed Thompson</i>		G4: Cut Waste, Not Marketing Programs, With Marketing Resource Management – <i>Kim Collins</i> ■ [S]	G2: The Role of Technology in Improving the User Experience – <i>Jim Davies</i> □ G27: Optimizing the Website User Experience – <i>Gene Phifer</i> □
10:45 a.m.	G6: Organization Change Management Techniques for CRM Success – <i>Matt Goldman</i> [S]	G8: Web 2.0 + Mobile + E-Commerce = eCRM2 – <i>Gene Alvarez</i> □	G5: Top Investments In Multichannel Campaign Management – <i>Adam Sarner</i> ■	G7: Multichannel Mecca: Where Do You Start? – <i>Johan Jacobs</i>
11:45 a.m.	<b>Attendee Lunch &amp; Solution Showcase Dessert Reception</b>			
1:45 p.m.	G9: How Generation Virtual Will Change CRM – <i>Adam Sarner</i> □	G11: The Top Ten Technology Trends To Disrupt CRM Architectures and Technology – <i>Ed Thomson</i>	G12: Improving the Effectiveness of Lead Management – <i>Michael Dunne</i> [S]	G10: Enterprise Feedback Management: The Who, When, Why, Where and What of Surveying – <i>Jim Davies</i> ■
1:45 p.m.	W1: Workshop: Getting the Most Out of Your Marketing Dollars – <i>Kim Collins</i> [S]		W2: Workshop: How To Leverage Social Media Within Your CRM Strategy – <i>Scott Nelson</i> □	
3:00 p.m.	Solution Provider Session & Case Study Presentation	Solution Provider Session & Case Study Presentation	Solution Provider Session & Case Study Presentation	Solution Provider Session & Case Study Presentation
4:15 p.m.	<b>K2: Gartner Keynote: Analytics to Action – Key Analyses for Customer-Centric Decisions</b> – <i>Gareth Hershel</i>			
5:15 p.m.	<b>Solution Showcase Reception</b>			
<b>Tuesday, September 15</b>				
7:00 a.m.	<b>Attendee Breakfast</b>			
7:15 a.m.	PB1: Maverick Breakfast: What if the Recession Doesn't End? – <i>TBD</i>		PB4: Maverick Breakfast: Getting Rid of the Human Through Virtual Assistants – <i>Johan Jacobs</i>	
8:00 a.m.	<b>K3: Guest Keynote</b> – <i>TBD</i>			
9:15 a.m.	G16: CRM Contract & Negotiation: Capture More Value from Products and Services – <i>Jane Disbrow</i> [S]	G15: Best Practices for Customer Data Quality Improvement: Delivering Data You Can Trust – <i>John Radcliffe</i> ■	G13: Sales Force Automation: Deploying What Salespeople Want – <i>Michael Dunne</i> [S]	G14: How Twitter and Social Media Will Disrupt Your Customer Service Processes – <i>Michael Maoz</i> □
9:15 a.m.	W3: Workshop: Customer Experience – <i>Ed Thompson</i>		W4: Workshop: Web Analytics Best Practices – <i>Bill Gassman</i> □ ■	
10:30 a.m.	Solution Provider Session & Case Study Presentation	Solution Provider Session & Case Study Presentation	Solution Provider Session & Case Study Presentation	Solution Provider Session & Case Study Presentation
11:30 a.m.	<b>Attendee Lunch &amp; Solution Showcase Dessert Reception</b>			
1:30 p.m.	<b>K4: Gartner &amp; 1to1 Customer Awards and Customer Experience Excellence Award Winner's Panel</b>			
3:00 p.m.	Solution Provider Session & Case Study Presentation	Solution Provider Session & Case Study Presentation	Solution Provider Session & Case Study Presentation	Solution Provider Session & Case Study Presentation
3:00 p.m.	W5: Workshop: CRM Contracts & Negotiation – <i>Jane Disbrow</i> [S]		W6: Workshop: Mastering Customer Data Quality – <i>John Radcliffe</i> ■	
4:15 p.m.	G19: Assessing the Value of CRM Analytics – <i>Gareth Hershel</i>	G18: Trends and Forecasts for the CRM Vendor Marketplace – <i>Sharon Mertz</i>	G17: Delivering on E-Commerce in a Wireless World – <i>Gene Alvarez</i> □	G20: Exploiting Knowledge for Web Self-Service – <i>Johan Jacobs</i> [S]
5:15 p.m.	Sponsored Hospitality Suites			
<b>Wednesday, September 16</b>				
7:00 a.m.	<b>Attendee Breakfast</b>			
7:15 a.m.	PB3: Radical Thoughts @ Breakfast: Making Gut Decisions More Intelligent – <i>Gareth Hershel</i>		PB2: Radical Thoughts @ Breakfast: Attack of the Personbots: All Your Customer Base Belongs to Us – <i>Adam Sarner</i>	
8:00 a.m.	<b>K5: Guest Keynote</b>			
9:00 a.m.	W7: Workshop: How to Use Key Performance Indicators to Manage CRM Initiatives – <i>Michael Smith</i> ■		W8: Workshop: Implementing a CRM Solution Using an External Service Provider (ESP) – <i>Matt Goldman</i> [S]	
9:15 a.m.	G24: Innovation: Your New Core Competency – <i>Kathy Harris</i>	G22: Using Analysis to Improve Online Channel Efficiency – <i>Bill Gassman</i> □ ■	G23: Focus on Pharmaceuticals: Showcase for Multichannel and Analytical Capabilities in Data-Rich Industries – <i>Dale Hagemeyer</i>	G21: Building a Cost-Effective Contact Center Infrastructure – <i>Drew Kraus</i> [S]
10:30 a.m.	Solution Provider Session & Case Study Presentation	Solution Provider Session & Case Study Presentation	Solution Provider Session & Case Study Presentation	Solution Provider Session & Case Study Presentation
11:15 a.m.	G28: Improvising CRM: Cost-Conscious Alternatives for Enabling CRM Strategies – <i>Matt Goldman</i> [S]	G26: Avoiding the Five Fatal Flaws of Business Intelligence – <i>Bill Gassman</i> ■	G3: At the Radar's Edge: Emerging Trends and Technologies – <i>Jackie Fenn</i>	G25: The Impact of Social Trends on the Future of CRM – <i>Scott Nelson</i>
12:15 p.m.	<b>Attendee Lunch</b>			
1:15 p.m.	G29: How to build for CRM in a tough economy – <i>Michael Smith</i>	G31: Creating a Customer-Centric Web Architecture – <i>David M. Smith</i> □	G30: Focus on Consumer Goods: How They Are Using Technology for Competitive Advantage and What Other Industries Can Learn From Them – <i>Dale Hagemeyer</i>	G32: Open: It's Your Choice to Repeat – <i>TBD</i>
2:30 p.m.	<b>Gartner Closing Keynote</b>			

Agenda as of June 1, 2009, and subject to change. Visit [gartner.com/us/crm](http://gartner.com/us/crm) for updates.

#### Additional Focus Areas:

- Customer Relationship Web Strategies & Web 2.0 Technologies
- CRM Analytics
- [S] Resourceful CRM

## Build Your Own Customized Agenda Online

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

#### **T1: “Getting” Gartner: How to Understand What We Are Talking About**

Aimed at both Business and IT users, this tutorial will explain the most commonly used Gartner frameworks such as Magic Quadrants and Hype Cycles that the analysts will present during throughout the conference.

*Sharon Mertz, Research Director*

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#### **G1: The Importance of the Customer Experience in a Recession**

The battleground to differentiate the business on the basis of superior customer satisfaction, loyalty and advocacy has never been tougher. During tough economic conditions the temptation is to ignore the customer in the pursuit of lower costs. But only those paranoid about the customer experience survive. This presentation examines customer experience management, outlines the most common tactics of leading organizations, and provides guidance on where to start.

- How do you manage NOT to forget the customer during tough economic times?
- Do you know which processes are creating profitable and positive customer experiences?
- How do you measure improvements?

*Ed Thompson, VP & Distinguished Analyst*

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#### **G6: Organization Change Management Techniques for CRM Success**

Successful CRM initiatives require cultural, behavioral, and technological change – both inside IT and the business. While enterprises routinely acknowledge that project’s leaders must anticipate and manage the CRM implementation’s organizational impact, it is still treated as a low priority. Yet, with a good grasp of CRM program change management strategies and some practical tools, success rates can be greatly improved.

- What are the typical cultural and behavioral impacts of RM?
- What can an enterprise do to prepare for CRM driven change?
- What can a basic CRM change management tool-kit be applied to improve CRM execution?

*Matt Goldman, Research VP*

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#### **G9: How Generation Virtual Will Change CRM**

In 10 years, the largest influence on all customer purchases will be their virtual experience. Companies will respond by spending more money trying to shape this experience than money spent offline. Web 2.0 signaled a “V-day” shift of control from company to customer, where powerful virtual destinations and communities proliferate. While traditional wisdom has focused on customer identification for one-to-one targeted marketing campaigns, cross-selling and so on, the reality of multiple anonymous personas (e.g., World of Warcraft), Twitter, online communities (e.g., YouTube and Digg) and the sheer power of their influence means that every customer will have an online persona driving your business relationship with that customer. In this new world companies will need new skills and techniques to engage and remain relevant. This presentation introduces the most disruptive threats to your organization’s continuous relationship with customers and presents the critical steps you should take today to meet those challenges.

- What will the virtual environment of tomorrow look like?
- How will companies sell to personas in a virtual world?
- How can companies develop customer relationships by deploying the right engagement technologies to fit the right business purpose?

*Adam Sarner, Research Director*

#### **G16: CRM Contracts & Negotiation: Capture more Value from Products and Services**

Many contracts are required to purchase, implement and manage the vendors involved in your CRM solution. This presentation will show how to capture more value by finding the right products and services and reviewing contract issues and negotiating skills for software licensing, SaaS, and implementation services. In addition, we will provide advice on managing the on-going CRM vendor relationships.

- How to find the right solution at the right price
- Where are the risks in contracts such as software licensing, SAAS and consulting
- How can you manage your vendors to improve value once the deal is signed

*Jane Disbrow, Research VP*

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#### **G19: Assessing the Value of CRM Analytics**

Analytics often suffers from a chicken and egg problem in that it can be difficult to understand the benefit of doing analysis without doing the analysis. This session will outline a benefits framework to use to estimate the likely benefits that organizations can obtain through different types of analytics investment in support of CRM initiatives.

*Gareth Hershel, Research Director*

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#### **G24: Innovation: Your New Core Competency**

Some organizations are redefining their business while others are focusing on radical improvement and optimization. All need innovative thinking and practices. These organizations are changing how they use technology, networks, value chains and other business levers. This presentation exposes leading edge thinking on innovation, creativity and game-changing capabilities.

- Which leading-edge techniques exemplify the future of idea generation?
- Which business levers, practices and behaviors will shape innovation in 2009-2013?
- How will organizations build innovative thinking and approaches into their DNA?

*Kathy Harris, VP & Distinguished Analyst*

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#### **G28: Improvising CRM - Cost-Conscious Alternatives for Enabling CRM Strategies**

The current economic environment forces Enterprises to rethink how and when to deploy or improve CRM solutions. The convergence of technology-friendly CRM tools with increasingly tech-savvy employees and customers present an opportunity to explore unconventional approaches to advancing CRM Strategies. This session will review the factors inhibiting traditional CRM solution development and highlight what Enterprises can do to advance their CRM programs without spending money you don’t have. Key issues addressed include:

- How is the recession affecting spending on CRM solutions?
- What are companies trying to do to compete?
- What unconventional approaches are available to drive and enable CRM solutions?

*Matt Goldman, Research VP*

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#### **G29: How to Build the Business Case for CRM in a Tough Economy**

In today’s economy, senior business executives require measurable financial benefits before approving any new investments. Many people feel that CRM results in “soft” benefits that are hard to quantify. In this session we will present our research on how to quantify the benefits of your CRM initiatives and ensure a common understanding of the projects objectives among the key stakeholders.

- What is the process for building an effective business case for your CRM project?
- How can business metrics be used to quantify the benefits of your project?
- How can the business case be used to increase the success of your CRM project?

*Michael Smith, Research VP*

#### **T2: Getting “Gartnered”: How Vendors Can Work Well With Analysts**

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

*Matt Goldman, Research VP*

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#### **G8: Web 2.0 + mobile + e-commerce = eCRM2**

The iPhone broke the glass ceiling for the mobile web and Web 2.0 empowered people express who they are and what believe in and want. This convergence of trends has forever changed your organization’s strategies for CRM over the web.

- How context aware computing with change your industry’s e-commerce and online CRM strategy?
- How to use user generated content to build relationships with your industry’s customers and increase sales?
- How to develop an eCRM2 strategy for your industry.

*Gene Alvarez, Research VP*

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#### **G11: The Top Ten Technology Trends To Disrupt CRM Architectures and Technology**

A new generation of CRM systems is emerging. CRM architectures, technology platforms and applications will have to adjust to handle Social, SaaS, SOA, OpenSource, Mobility, Virtualization and other trends. This session explores those changes, scrutinizes the strategies of key CRM vendors and discusses how organizations should prepare for this brave new world.

- How can you manage the emerging trends in CRM?
- How do you know what to believe from CRM vendors?
- How can you better prepare for the journey ahead?

*Ed Thompson, VP & Distinguished Analyst*

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#### **G15: Best Practices for Customer Data Quality Improvement: Delivering Data You Can Trust**

Poor customer data quality is an often-overlooked business issue, but it can have a large negative effect. This session will describe how data quality issues hurt the business, and explore strategies for how to best align resources for achieving lasting improvements in customer data quality.

*John Radcliffe, Research VP*

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#### **G18: Trends and Forecasts for the CRM Vendor Market Place**

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

*Sharon Mertz, Research Director*

#### **G22: Using Analysis to Improve On-Line Channel Efficiency**

On-line channels produce better results when optimizing advertising, content and Web site navigation using Web analytics tools. Learn why some organizations succeed at this while others fail?

- How can an analytic culture improve Web site results?
- What maturity level is required and how can you get there?
- What is the vendor landscape and how is it changing?

*Bill Gassman, Research Director*

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#### **G26: Avoiding the Five Fatal Flaws of Business Intelligence**

CRM organizations source BI in many ways, including from outside the corporate BI infrastructure. Knowledge of how to avoid BI common ‘fatal flaws’ will help improve the performance of CRM investments.

- What are common fatal flaws in exploiting business intelligence?
- How can enterprises keep from repeating these flaws?
- Been there – dumb that. Now what?

*Bill Gassman, Research Director*

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#### **G3: At the Radar’s Edge: Emerging Trends and Technologies**

Too many companies are blindsided by major trends that seem to explode out of nowhere, demanding resources and attention and triggering fears of being “left behind”. But those who pay attention will have spotted these trends as they evolve in different industries, in the consumer world, or in niche applications. In this presentation we examine early indicators of major future trends in CRM and beyond, providing opportunities for early adopters and a better sense of preparedness for all strategic planners.

- Which emerging and embryonic technologies should organizations be examining for competitive advantage?
- What techniques do industry leaders use to track, prioritize, evaluate and drive innovation into the business?

*Jackie Fenn, VP & Gartner Fellow*

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#### **G31: Creating a Customer Centric Web Architecture**

All web sites, whether customer centric or not, utilize basic web architecture. Advancements in the web itself (and related cloud computing concepts) along with offerings from vendors and ability to leverage these improvements will impact a company’s ability to truly deliver a customer centric experience. This session will examine the overall direction of web technologies and their impact on customer centric strategies.

- How are web technologies evolving and which provide the highest impact to enterprise’s web strategies?
- Which vendors will deliver technologies suitable for customer centric web efforts?
- How can enterprises align their customer centric strategies to best make use of web architectures?

*David Smith, VP & Gartner Fellow*

### Session Descriptions

#### **T3: TechnoBabble 101: How to Bluff Your Way Through a SOA/SaaS/Cloud Discussion**

Suffering from acronym burnout? Are you having trouble keeping up with all the technobabble and the multitude of CRM acronyms? This session will cover the most important acronyms in CRM to remember and prepare you to better engage industry peers, software vendors and system integrators.

*Gene Phifer, Managing VP*

#### **G4: Cut Waste, Not Marketing Programs with Marketing Resource Management (MRM)**

Marketing budgets and performance are under increased pressure in this tough economy. Yet, marketing remains absolutely critical to retaining and growing customer relationships. Companies should not cut vital marketing programs but should instead look to eliminate marketing waste and improve marketing productivity. Marketing Resource Management or MRM can enable companies to save 5 to 15% of their marketing budget without having to cut one program. There are also huge upside or revenue enhancing advantages of MRM as well via a stronger brand, improved competitive agility, faster time to market and increased performance management. This session will address these key issues: 1) What are the five competencies of MRM and what benefits do each bring to my marketing organization? 2) How do you determine which competencies to invest in for MRM? 3) How do you select appropriate technologies and vendors for MRM?

- Marketing faces budget cuts and performance pressure
- Marketing must support retention and growth activities but with less budget
- Marketing must become more measurable and performance driven different marketing technology budgets

*Kim Collins, Managing VP*

#### **G5: Top Investments in Multi-Channel Campaign Management**

Multi-Channel Campaign Management is a critical connection point to a company's customers and prospects in good times and bad. Customer Investment cannot simply be severed in economic slowdowns. Investments in Multi-Channel Campaign Management in multiple areas such as segmentation, e-marketing, inbound/outbound fusion, event triggered marketing and social applications can increase both efficiency and effectiveness, while increasing customer experience.

- What will be driving Multi-Channel Campaign Management for the next two years?
- How can companies prioritize and leverage Campaign Management investment around Cost optimization?
- Which campaign management technologies will be best suited for World Class Campaign Management in the medium term?

*Adam Sarner, Research Director*

#### **G12: Improving the Effectiveness of Lead Management**

Weak economic conditions are compelling companies to aggressively explore better ways to increase the volume of quality leads for sales channels. Consolidating lead management practices into an integrated business process spanning marketing and sales will prove vital in successfully realizing ROI and aiding strategies for renewing business growth. This session will cover: How should lead management be redefined to improve lead conversion and revenue production? What are the key components of an effective, end-to-end lead management process? How best to automate key lead management functions?

- Defining more effective lead management processes
- Aligning marketing and sales
- Acquiring suitable technical solutions

*Michael Dunne, Research VP*

#### **G13: Sales Force Automation: Deploying What Sales People Want**

In down economies shoring up revenue becomes a priority equal to or even surpassing cost cutting efforts — if revenue declines faster than expenditures the impact of spending cuts is essentially annulled. However selling organizations have tried for years to leverage technology to increase revenue with mixed results.

### Session Descriptions (cont.)

#### **G13: Sales Force Automation: Deploying What Sales People Want (cont.)**

This presentation will analyze shortcomings with sales force automation projects commonly encountered by enterprises, corrective measures and key technological developments and applications that hold promise in helping sales organizations realize greater productivity and effectiveness. This session will cover: What factors will compel sales to continue to attempt to automate sales processes? How will sales derive value from sales automation? Which software markets and solutions will best meet the needs of selling organizations over the next 5 years?

- Identifying the best processes to optimize to gain the greatest ROI
- Securing buy-in across sales
- Deploying the best tools to improve sales performance

*Michael Dunne, Research VP*

#### **G17: Delivering on E-Commerce in a Wireless World**

The ease of using the web over the iPhone and other Smartphone browsers is changing the way customers arrive at your web site. No longer are they bound to their home or workplace PC to evaluate your organization's products or services. In this session we will discuss

- How mobile users will use your company web site?
- How mobile users will pull content from your organization's sites?
- How location based services will help to build context with customers?

*Gene Alvarez, Research VP*

#### **G23: Focus on Pharmaceuticals: Showcase for Multichannel and Analytical Capabilities in Data Rich Industries**

Physicians need to stay informed on existing as well as new therapies but constraints on their time require that they gather information from multiple sources. Nowhere is having "one view of the customer" more critical than in pharmaceuticals because physicians drive rather than actually making purchases. The resulting business processes demonstrate how multichannel delivery and advanced analytics are key in understanding and meeting physician needs. In this session we will evaluate:

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

*Dale Hagemeyer, Research VP*

#### **G25: The Impact of Social Trends on the Future of CRM**

What happens in the broader society is having an impact on firms' business strategies. Think of Internet adoption as an example. Going forward, how can firms become more aware of social trends going on around them, and thereby change their strategies to take advantage of those changes, rather than be left reacting? This session will look at adding this valuable dimension to your strategic planning, by investigating some trends that are going on even as we speak, and looking at what the business and CRM impacts will be.

*Scott Nelson, Managing VP*

#### **G30: Focus on Consumer Goods: How They Are Using Technology for Competitive Advantage and What Other Industries Can Learn from Them**

Consumer goods companies are unique in that their selling model is through retailers in route to consumers. This requires understanding retailers as well as consumers in unique ways. In this session we will look at:

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

*Dale Hagemeyer, Research VP*

#### **G7: Multi Channel Mecca - Where Do You Start?**

The promise of cost savings and operational enhancements that comes with the Multi Channel salesman is not new. Usually the benefits claimed is not unrealistic but the real challenge lies in where do you start when planning a multi channel self service strategy and deployment. A wrong start in self service could increase your phone volumes with customers never returning to the automated channels. A good start will place you on the road to success. This presentation will focus on what all is typically found in a multi channel strategy and environment and what order should you approach the deployments in order to achieve the maximum success.

*Johan Jacobs, Research Director*

#### **G10: Enterprise Feedback Management: The Who, When, Why, Where and What of Surveying**

Most organizations survey their customers but very few apply best practice. Customers are being bombarded with generic, badly crafted questionnaires and are becoming increasingly reluctant to participate. The process is painful and they see no value in responding. Enterprise feedback management (EFM) solutions help organizations ask customers the right personalized questions at the right time on the right channel. They ensure appropriate follow up actions are initiated and a holistic role based analytical view is reported. In an economic environment where customer satisfaction and loyalty are critical, EFM solutions that help organizations understand their customer needs and perceptions as well as drive actions and provide clear reporting is emerging as a hot investment area.

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

*Jim Davies, Research Director*

#### **G14: How Twitter and Social Media will Disrupt Your Customer Service processes**

Disruptive technologies and applications such Twitter, FaceBook, YouTube and Social Software are rapidly shifting power to customers. Retention strategies and reputation management will face increasing pressure as the new consumer (or citizen or partner) comes to expect a greater role in collaborating and defining customer service levels and the processes themselves.

- What are the business and technology drivers for pulling the e-customer and social networking communities into your customer service processes?
- How will organizations harness Social CRM processes and software to improve customer service?
- Which vendors and best practices best support world class customer service initiatives?

*Michael Maoz, VP & Distinguished Analyst*

#### **G20: Exploiting Knowledge for Web Self Service**

Customer self-service is an active area of technology innovation, with technologies such as natural-language search, automated e-mail response systems, knowledge management in self service and speech recognition in the call center replacing labor-intensive interactions. When properly deployed, self-service automation is beginning to have a significant impact freeing up time for service representatives to handle tasks that require personal attention. This presentation will explore and focus on what is in and what is out of self service and what business impacts there are when deploying a self service solution.

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

*Johan Jacobs, Research Director*

#### **G21: Building a Cost Effective Contact Center Infrastructure**

Creating and maintaining a cost-effective contact center is a challenge to most organization. Learn how customer service strategies are evolving in today's uncertain economic environment and how technology can help you do more with less?

*Drew Kraus, Research VP*

#### **G27: Optimizing the Web Site User Experience**

IT's focus has historically been on traditional user interfaces like mainframe screens, PC's and the Web. This has expanded recently to user interaction patterns and models, but a further expansion is right around the corner: to the management of the full user experience (UX), where mobile devices and even consumer electronics have a role.

- How have UX approaches evolved over the years, what is the state of the art of UX, and what technologies support an effective UX?
- How do concepts like usability, ergonomics, psychographics and customer experience drive enterprise IT decisions concerning UX methods and technologies?
- What is the future of the UX, and what must IT do today to prepare itself

*Gene Phifer, Managing VPs*

#### **G2: The Role of Technology in Improving the Customer Experience**

With customer satisfaction levels no higher than a decade ago, few organizations can claim to have improved the customer experience much, despite the billions of CRM software license dollars invested. This challenge is not getting easier with time. Contact centers are currently under increased pressure to cut costs, but this activity is usually detrimental to the customer experience. In addition, the next generation of web-native customers have high expectations of what is an acceptable Web experience and as a result most organizations need to undergo a web-technology refresh exercise. Overall, implementation success requires investment in technologies that both meet operational needs and enhance the customer experience.

- How can traditional and emerging CRM technologies both enhance the customer experience and ensure operational effectiveness?
- How can customer processes be enhanced to improve the customer experience across the web and contact center?
- How can organizations better understand the experience they give to customers?

*Jim Davies, Research Director*

**W1: Workshop: Getting the Most out of Your Marketing Dollars**

In a tough economy, CMOs are under increased pressure to make every marketing dollar count and deliver ROI for marketing programs and campaigns. Leaders and managers across marketing can support the CMO by prioritizing spending based on performance and ROI. Enterprise marketing management (EMM) is a key enabler but marketing organizations may not have the capability to invest in a total platform to support EMM. This workshop will help companies identify key areas of marketing investment to help companies drive revenue through retention and growth campaigns, eliminate waste and improve overall ROI in the short-term while planning a longer term phased roadmap for EMM.

- Marketing must do more with less budget
- CMOs must lead the charge but require the support of other marketing managers
- A total EMM platform may be hard to justify in this tough economy but it should be the ultimate goal

*Kim Collins, Managing VP*

**W2: Workshop: How To Leverage Social Media within Your CRM Strategy?**

Everyday there seems to be another site popping up. Myspace, Facebook, Twitter, LinkedIn, Brightkite. The list grows longer and longer. And every day there is another article about why your business should be using these social media sites to generate new business. But does that work? And if so, how do you get started? And how do you have a long term strategy that will allow you to learn and grow in your knowledge of the space, even as tomorrow's hot sites are waiting to be created. This is not a presentation, it is an interactive session where we will learn, and share, and together figure out how to make sense of all of the hype.

- How a social media strategy fits with your other online, and non-online CRM strategies?
- How do you put the pieces together to make it work for your organization?

*Scott Nelson, Managing VP*

**W3: Workshop: Customer Experience**

This workshop will focus on discovering best practices from the multitude of different ways to improve the customer experience through peer collaboration. Participants will need to be prepared to contribute and work with other attendees to help answer the question: "Which techniques have the greatest positive impact on the customer experience?"

*Ed Thompson, VP & Distinguished Analyst*

**W4: Workshop: Web Analytics Best Practices**

Most organizations use Web analytics, but all are struggling to get the most value from the tools and processes that use them. Come to this workshop prepared to share your best and worst Web analytics practices and listen to others share theirs.

- Which organizational structures work best and who should sponsor the initiative?
- How should Web analytic data be integrated with data from marketing and CRM applications?
- Which vendors and tools should be considered in a Web analytics initiative?

*Bill Gassman, Research Director*

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**W5: Workshop: CRM Contracts & Negotiation:**

This interactive workshop will focus on how to maximize your dealings with vendors during these challenging economic times, as well as provide insight into how to manage challenging negotiations including when vendors are not performing according to expectations.

- How do we deal with vendors during this challenging economy environment?
- What are some of the vendor challenges that can be handled by negotiating good terms and conditions?

*Jane Disbrow, Research VP*

**W6: Workshop: Mastering Customer Data Quality**

This interactive workshop will focus on the topic of creating a new master customer database, using master data management (MDM) or associated disciplines and technologies, to meet the organization's single view of customer needs. Attendees will be encouraged to engage with their peers in other organizations and drill down into the subject with moderation and input from the Gartner analyst.

- How can I create a vision, strategy and business case for an MDM of customer data program?
- How can I leverage MDM best practices in the areas of governance, organization and process?
- How do I create an architecture and technology infrastructure for MDM?

*John Radcliffe, Research VP*

**W7: Workshop: How to Use Key Performance Indicators to Manage CRM Initiatives**

Justifying and managing CRM initiatives in today's economic environment is more than challenging. It requires the primary stakeholders to assess and evaluate CRM opportunities in measurable terms. In this session we will cover the steps necessary to perform this assessment and examples of the metrics that can be used to measure the results.

- How do we quantify the benefits of CRM?
- What are the right metrics to measure the business benefits of CRM?
- How do we engage the right stakeholders to ensure success?

*Michael Smith, Research VP*

**W8: Workshop: Implementing a CRM Solution Using an External Service Provider (ESP)**

Best practices around implementing a CRM solution using an external service provider (ESP). An interactive discussion focused on helping you work more effectively with your provider to better plan and execute your CRM initiative

*Matt Goldman, Research VP*



## Session Descriptions

### PB1: Maverick Breakfast: What if the Recession Doesn't End?

We hope and plan for the economy to recover in the next year or two, but what if it doesn't? Historical precedents exist for decades-long depressions and this session will discuss the implications of this possibility for your CRM strategy and current decisions.

TBD

### PB4: Maverick Breakfast: Getting Rid of the Human Through Virtual Assistants

The use of humanoid interfaces or chatbots or avatars or virtual assistants (VA) are increasingly being deployed to assist organisations in self service processes but can these VA's take complete control of a channel to provide a human feel to the service offering without a human presence. Recent awards of the Loebner prize says this is possible and some organisations are already using VA's in self service channels so maybe the future is here already. We will explore what is possible in using Virtual Assistants for exploiting self service and look at the replacement of the human in the self service value chain.

Johan Jacobs, Research Director

### PB3: Radical Thoughts @ Breakfast: Making Gut Decisions More Intelligent

Organizations collect data to analyze it and make better decisions, but why are so many decisions made without analysis? This session will outline the latest thinking in decision theory and consider the implications for customer related decisions.

- How do we use analysis to drive decisions?
- How do we ensure that decisions are driven by analysis?

Gareth Herschel, Research Director

### PB2: Radical Thoughts @ Breakfast: Attack of the Personbots: All Your Customer Base Belong to Us.

In less than 10 years, business will spend more money trying to accommodate Personabots than influencing live customers, online or off. While the hype has been around social media and having real two-way personal engagement with customers, the reality is that most customers do not want an intimate or high touch relationship with companies, nor do they have time to have engage in all those conversations. Tom Sawyer's friends will soon be walking away from the fence. Enter the Customer Personabot, an fully automated, personality infused, self-learning, self-replicating, virtual representative that will be used as the primary customer tool for facilitating business on the customer's behalf, from tactical to the strategic. They will be "engaging" online destinations with their own tools, their own preferences, their unbreakable privacy rules and processes. They will come in at will and leave no personal data behind. Leading companies will accommodate, others will be irrelevant and passed over.

- What are the Drivers for mass adoption of Personabots?
- How to create online selling environments for self-serving information protecting, often anonymous, automated personas?
- How will leading businesses survive the attack with Personabots of their own?

Adam Sarner, Research Director

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