

**EARLY BIRD SAVINGS**



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The 11th Annual  
**Gartner Customer Relationship  
Management Summit 2010**

16 – 17 March 2010 | London, UK  
[europe.gartner.com/crm](http://europe.gartner.com/crm)

**SOCIAL CRM**  
Return on Investment  
**Customer Experience**  
**E-Commerce**  
Return to Growth

**Actionable Advice and Fresh Ideas to Initiate,  
Reinforce and Optimize Your CRM Strategy**

**SUMMIT CO-CHAIRS**



**Jim Davies**  
Research Director  
Gartner



**Ed Thompson**  
VP, Distinguished Analyst  
Gartner

**KEYNOTE ADDRESS**



**Robert Shaw**  
Professor of Marketing Metrics  
at Cass Business School



**A GARTNER FOR IT LEADERS SUMMIT**

**Gartner**  
Customer Relationship  
Management  
Summit 2010



# Introduction

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How to Register

## Who Should Attend

Senior IT and business professionals with a focus on managing their organization's customer relationships will benefit from attending this Summit:

- CRM Project/Program Managers
- Chief Marketing Officers
- CIOs
- IT managers
- Heads of Customer Experience
- Heads of Customer Intelligence
- Customer service and support executives
- Master Data Management (MDM) and Customer Data Integration (CDI) program managers
- Data quality improvement initiative leaders
- Sales and marketing executives
- Technology strategists
- Applications managers
- Customer solutions technology specialists
- Business analysts
- Strategic planners
- Sales operations managers
- Line of business executives
- Front-office applications specialists
- Enterprise and solution architects

## Actionable Advice and Fresh Ideas to Initiate, Reinforce and Optimize Your CRM Strategy

As the world shows signs of economic recovery, organizations need to follow suit by altering their Customer Relationship Management strategies. A fine balance needs to be achieved between two risks. On the one hand, CRM initiatives need to pay their way and prove their value to the business. A project or initiative that cannot demonstrate its value to the business runs the risk of not being approved.

On the other hand, the customer is not standing still. Numerous surveys demonstrate that customers now expect more. They are communicating through new channels and they reveal negative experiences to the world more frequently. The risk is that if the customer feels ignored or the organization is not responsive, they will take their business elsewhere.

To address these risks, the traditional operational focus of CRM needs to be augmented with an analytical and socially driven approach. Best practice needs to be applied to new projects, existing investments need to be refined and innovative ideas embraced to fuel a differentiated customer experience.

Whether you're new to CRM, or a CRM "master", a business strategist or an IT leader, the 2010 **Gartner Customer Relationship Management Summit** provides you with both actionable advice and fresh ideas to initiate, reinforce and optimize your organization's CRM strategy. Learn from the latest Gartner research, benefit from the experiences of other organizations, and share best practices with your peers.

We look forward to seeing you there and to discussing your ideas!

### Jim Davies

Research Director  
Gartner

### Ed Thompson

VP, Distinguished Analyst  
Gartner

### Shane O'Rourke

Program Director  
Gartner

## HOT TOPICS

- CRM Strategies
- 8 Building Blocks of CRM
- Managing Change
- Return on Investment
- Acquiring and retaining customers
- Social CRM
- Advanced analytics
- Data quality
- Master Data Management
- Architectures and Technologies
- Enterprise Feedback Management
- Software as a Service
- Evolving customer and social trends
- Customer Self Service
- Single view of the customer
- Customer Experience Management
- Multichannel customer service
- Next generation CRM



# New for 2010

## Customize Your Agenda

We understand your need for relevant information and guidance to match your particular focus on CRM. To meet this need, sessions have been identified with icons to help you navigate your way through the agenda:

- T Technology Focused Sessions:** Technology leaders turn to Gartner for independent insight into their most pressing technology issues. Sessions focusing on CRM architectures, technology platforms and applications are marked with a “T” icon.
- B Business Focused Sessions:** CRM is not just about technology, it's a combination of policies, processes, and strategies. Sessions focusing on the business implications of CRM are highlighted with a “B” icon.

## Best Practices Workshops

The CRM Summit includes a series of workshops addressing some of the key CRM challenges facing organizations today. Specifically designed to be highly interactive, these workshops will facilitate peer to peer exchange and networking — combined with the expert advice of Gartner's analysts.

See page 9 for details.

## Case Study Roundtables

To help you delve deeper into the case study presentations and discuss the issues raised with the presenters — and your peers — break-out roundtable sessions will be held to give you an added opportunity to interact. Numbers for these sessions are limited by design to allow for in-depth conversations. **Register via the agenda builder — [ab.gartner.com/crm11i](http://ab.gartner.com/crm11i)**

## Magic Quadrant Sessions

Assessing a market and its participants is a daunting task. Presented on the “Solution Showcase”, the Magic Quadrant presentations offer snapshots of markets and their participants, enabling you to map vendor strengths against your current and future needs.

## “Getting Gartner” Session

Aimed at both business and IT users who are new to Gartner and to Gartner Summits, this session will explain the most commonly used Gartner frameworks such as Magic Quadrants and Hype Cycles that the analysts will present throughout the Summit.

### Advisory Board for the CRM Summit

The Gartner Customer Relationship Management Summit operates with the advice and input of a number of individuals from end-user organizations, to help guide the content and direction of the Summit and ensure that the Summit addresses the needs of the audience. We would like to thank the following individuals for their ongoing advice and support:

- Paul Laughlin, *Head of Customer Insight, Lloyds TSB Insurance*
- Christoph M. Oggenfuss, *Head Marketing COMIT AG a Swisscom Company*
- Sander Daniels, *Head of Client Relationship Management, RBS*
- Bill Dixon, *Manager Customer Experience, Qatar Airways*
- Ryan Powell, *Senior Strategy Analyst, Virgin Media*
- David Montgomery-Law, *CRM Development Manager, Strategic Partnership Business Unit, Schering Plough*

## Key Benefits

that you will derive from attending the Gartner Customer Relationship Management Summit:

- Develop a framework for building successful CRM projects: using Gartner's Eight Building Blocks for CRM
- Learn from the experiences of others: benefit from the best practices gleaned from Gartner's investigation of thousands of CRM projects
- Address your specific challenges in one on one meetings with Gartner analysts
- Speak directly to Gartner analysts to develop a CRM strategy that delivers real, measurable business value
- Make wise investments: understand the business, market, technologies and disruptions that will affect your enterprise — and be prepared
- Improve the success rates of your CRM initiatives by developing organizational change management techniques
- Optimize your business results by learning how to effectively use analytics
- Explore best practices and technology for achieving lasting improvements in data quality
- Cut through the Master Data Management hype and learn how MDM can help your CRM strategy
- Explore the social, technological and economic trends that will influence the next generation of CRM
- Network with your peers and share best practices to address the key CRM challenges.



# Keynote / Plenary Sessions / End-User Case Studies

## Gartner Opening Keynote: Solving Conundrums About Customers, Communities and Collectives — The New Business of CRM

Organizations are facing huge uncertainty and massive change — the rules of engagement with customers, prospects, communities and collectives have changed dramatically. The new environment is digitally enabled and socially connected, but are organizations ready? What issues dominate the business agenda? What do CEOs expect? How should CIOs respond? Do people really know what they want from enterprises, the public sector, or even each other? Is value still important and does online reputation really matter? This keynote introduces the most significant trends and challenges you face as you seek to thrive and grow during the recovery.

**Steve Prentice, VP & Gartner Fellow, Gartner**

## Guest Keynote: How to Maximize Return on Ideas from CRM Investments and Experiments

Astute CRM managers maximize “return-on-ideas” according to a landmark study of 100 organizations. Experimentation, risk and complexity are inescapable in the accelerating world of social networks and emotional gratification, yet how can managers juggle an expanding range of initiatives and mitigate the risks of costly experiments? Dr. Shaw will set out the infinity model for Return on Ideas, commissioned and endorsed by three prominent professional organizations, illustrating it with case examples from the study.

**Dr. Robert Shaw, Professor of Marketing Metrics, Cass Business School, Founding Director of Value Based Marketing Forum**

## Gartner Closing Keynote

This keynote, presented by all of the CRM analysts, distills the key pieces of insight and advice that were shared in the 20 Gartner presentations across the four tracks and two days, and gives a concise list of action points and ideas that will help you to take your CRM initiatives to the next level. Topics covered will range from foundational best practice to embracing social CRM and the collective.

## End-User Case Studies

The Summit features several end-user case study presentations from senior IT and business executives from leading organizations from various industries and countries. The case studies bring the practitioners’ own valuable experiences to the audience and highlight the technologies and solutions adopted in their own environments, as well as a description of strategy and approach, choice of technologies, mistakes to avoid and how to measure success. Keep updated as the case studies are added to the agenda — see [europe.gartner.com/crm](http://europe.gartner.com/crm)

### The Trainline.com

**Bill Hopkins, Operations Director**

### BT

**Nigel Turner, Head of CRM Competence Centre**

### Partner Communications (Orange Israel)

**Gil Tamer, BI Department Manager, IT Division**

### London Borough of Brent

**Tony Ellis, Head of IT**

## Case Study Break-Out Sessions

Join selected case study speakers for 30 minute roundtable discussions immediately after their case study presentations. Facilitated by a Gartner analyst, these sessions will give you an additional opportunity to discuss the issues and best practices identified in the case study presentations.

## The Gartner and 1to1 Media CRM Excellence Awards



Are you proud of your CRM or customer initiative? Is your organization truly customer focused and committed to providing personalized, consistent and appropriate experiences for each and every customer interaction? Would you like to share your experiences with like-minded professionals and attempt to win the highly coveted Gartner and 1to1 Media CRM Excellence Award? If so, then now is the time to act!

Gartner and 1to1 Media invites organizations to apply for the 2010 Award via a simple downloadable questionnaire that is available on the awards Web site. See [europe.gartner.com/crm](http://europe.gartner.com/crm) for the submission procedure and associated information. **The final date of entry is Friday 15 January 2010.**

Entries will be rated by a panel of Gartner analysts and 1to1 Media judges. There will be five separate awards for enterprise-wide initiatives, growth, efficiency, customer experience and innovation. All submissions will be evaluated on how comprehensively their initiatives embrace each of the 8 Building Blocks that Gartner defines as critical for CRM success (see Web site for details).

After the five award winners have been selected, the best three will be invited to present their findings at the 2010 Gartner Customer Relationship Management summit in London, and an overall winner will be chosen by the audience. Winners and their success stories will be featured in 1to1 Media print and online publications.

## INDUSTRY AND ROLE CUSTOMIZATION

The Gartner Customer Relationship Summit will provide advice and ideas to delegates from a wide variety of industries including retail and wholesale, telecoms, insurance, banking, consumer goods, public sector, high-technology, pharmaceuticals, media, utilities and many others.



# Gartner Research

WORLDWIDE EXPERTISE AT YOUR FINGERTIPS —  
YOUR QUESTIONS ON CUSTOMER RELATIONSHIP  
MANAGEMENT ANSWERED!

## Gartner Analyst One-on-One Meetings

The opportunity to spend 30 minutes privately discussing a topic of your choice with a Gartner analyst who specializes in that area.

Gartner analysts draw constantly from the real-life challenges and solutions experienced by more than 45,000 clients worldwide. The value of resource, combined with our deep analysis of technology vendors, is unrivalled.

## Meet the Analysts



**Gene Alvarez**  
Research VP, US

**Focus Areas:** Business to Business and Business to Consumer e-Commerce strategies and Technologies, CRM and Web Customer Experience Management, Partner Portal Strategies, Sales Configuration Technologies



**Jim Davies**  
Research Director,  
UK

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



**Alexander Drobik**  
Managing VP, UK

**Focus Areas:** Evolution of Business Applications, E-Business and E-Commerce Trends, and Emerging Business Models



**Michael Dunne**  
Research VP, US

**Focus Areas:** Sales Automation, Sales Performance Management, Sales Effectiveness, Sales and Marketing Alignment, Price Optimization and Management, Sales Incentive Compensation Management, Territory Management, Lead Management and Sales Analytics



**Matt Goldman**  
Research VP, US

**Focus Areas:** Customer Experience Management, External Service Provider Evaluation and Selection, Customer Analytics Outsourcing, Market Trends for CRM Services Including Consulting, System Integration and Business Process Outsourcing



**Gareth Herschel**  
Research Director,  
US

**Focus Areas:** Customer Segmentation, Predictive Analytics, Text Mining, Real-Time Recommendations, 360 Degree View of Customer, CRM Metrics and Performance Management, Customer Profitability Analysis



**Johan Jacobs**  
Research Director,  
South Africa

**Focus Areas:** Self Service, eServices, Web Chat, Collaborative Browsing, eMail Response Management, Virtual Assistants, Knowledge Base for Self Service, eService Vendors, Multi-Channel Contact Center, Customer Interaction Hub



**Michael Maoz**  
VP, Distinguished  
Analyst

**Focus Areas:** Customer Service Strategies, Customer Service CRM Multi-channel Applications, SaaS/On Demand CRM applications, Social Networking, CRM Strategies, eCustomer and Mobile CRM



**Steve Prentice**  
VP, Gartner Fellow

**Focus Areas:** Emerging Trends and Technologies, Technology, Business and Society, Innovation, Human Computer Interaction, Business Strategies and Societal Influences, Virtual Environments/ Collaboration, Consumer Technologies and Business



**Adam Sarner**  
Research Director

**Focus Areas:** Marketing Automation: Includes Multi-Channel Campaign Management, Marketing Resource Management, Enterprise Marketing Management, Loyalty Management, Lead Management, E-Marketing, and Social CRM/Online Relationships



**John Radcliffe**  
Research VP, UK

**Focus Areas:** Single View of Customer, Customer Data Integration, Master Data Management, Data Quality



**Ed Thompson**  
VP, Distinguished  
Analyst

**Focus Areas:** Customer Experience, Management, CRM Strategy and Implementation, CRM Deployments in Europe, CRM Vendors, Feedback Management

## Gartner for IT Leaders

Today's CRM professional is inundated with not only information, but with questions as well. Build or buy a CRM solution? How to make CRM strategic and actionable? Which performance metrics to use? How to justify a major CRM investment? Gartner can help to keep you well equipped to manage today's challenges and seize tomorrow's opportunities.

**Getting information is easy, but is it insightful and relevant?** Your time is scarce. Spend less time searching for information and more time applying relevant insight to your IT initiatives that need effective solutions — right now.

**Ensure your success as an IT leader.** Get the insight you need — when you need it. With instant Web access to exclusive Gartner research that's relevant, insightful and tailored for IT leaders in business intelligence and performance management.

### Your Role. Your Event.

Insightful and relevant events aligned to your role, your priorities and your challenges.

- Applications
- Business Intelligence & Information Management
- Business Process Improvement
- Enterprise Architecture
- IT Infrastructure & Operations
- Program & Portfolio Management
- Security & Risk Management
- Sourcing & Vendor Relationships

Interested in our role-based events? Visit [gartner.com/events](http://gartner.com/events) for further information.

Sign up to our monthly Events Insider newsletter at <http://gartnerinfo.com/eventsinsider/>



# Summit Agenda

## Track 1: INITIATE



For many organizations, investment in CRM is either on the agenda for the first time or back on the agenda with new leadership. But in the wake of a recession projects need to be focused and able to deliver a measurable ROI. **Aimed at those who are new to CRM or commencing new CRM initiatives**, this track draws upon over a decade of experience and hundreds of CRM projects to provide guidance on all aspects of embracing a CRM project. We provide lessons from the past, suggest ideas on how to get started, explore how to design, deliver and track a rewarding customer experience and delve in to the technical and cultural challenges that will be faced along the way.

### The Essential Eight Building Blocks for Successful Customer Relationship Management

B

To succeed at CRM requires more than technology, as many organizations have discovered painfully. There are in fact eight key dimensions that should be considered. Each has equal importance and only one is linked to technology. Gartner's "Eight Building Blocks of CRM Framework" provides an essential backdrop for anyone embarking on a new CRM program.

- What are the eight building blocks for CRM?
- How can these building blocks drive CRM success?
- How can organizations evolve their eight building blocks of CRM over time?

**Gene Alvarez**

### Lessons from 1500 CRM Projects and the CRM Excellence Awards

B

Learn from the best on how to take a CRM strategy and make it into a successful CRM implementation. This session illustrates case studies and best practices in CRM resulting from Gartner's investigation of over 1500 client projects and the past five years of CRM Excellence Awards. The presentation will identify:

- The attributes of successful CRM projects
- What best practices should be applied when using an ESP
- How to ensure alignment of objectives and measures for CRM success

**Matt Goldman**

### Falling in Love With Your Marketing, Sales and Service Processes All Over Again

B T

The processes of marketing, selling, and servicing are the key building blocks of a customer strategy, but many enterprises continue to make blunders in their design. This presentation examines the top processes for marketing, sales and service, accounting for the threats and opportunities brought about by the rise of social networks and ubiquitous access to online resources.

- What are the key processes across sales, marketing and customer service and how do you monitor and improve them?
- What trends are driving changes to these processes?
- How will core CRM processes evolve as they become more impacted by social networking?

**Michael Maoz**

### The Top 5 Technology Trends to Disrupt CRM Architectures and Technology

T

A new generation of CRM systems is emerging. CRM technology platforms, architectures, delivery methods and applications are changing to support new technologies: Social Networking, Mobile Applications, SaaS and Cloud, SOA, OpenSource, and Analytics. This session explores those changes, assesses the strategies of key CRM vendors and discusses how organizations should meet the arising challenges and opportunities.

- Which technology trends will dominate and shape the CRM application environment to 2013?
- How will CRM technology platforms, architectures, delivery methods and applications evolve to embrace these trends?
- How will the CRM application vendor landscape evolve in response to the new architectures and technologies?

**Alexander Drobik**

### CRM Strategy and Metrics for Securing Business Value

B

In a recovering economy a return to customer-centric business goals is expected, but finite budgets require a positive return on investment. Innovative approaches to engaging customers will, however, yield compelling opportunities for generating profitable growth. This presentation analyzes best practices for developing a CRM strategy that delivers real business value, and provides guidance on how to measure successful execution.

- Why have enterprises failed to increase customer satisfaction and derived adequate value from CRM?
- How can enterprises craft CRM strategies that produce convincing results?
- How will enterprises measure improvements from new CRM strategies?

**Michael Dunne**

### Organizational Change Management Techniques for CRM Success

B

Successful CRM initiatives require cultural, behavioral and technological change — both inside IT and the business. While enterprises routinely acknowledge that project leaders must anticipate and manage the CRM implementation's total organizational impact, this is still treated as a low priority. Yet, with a good grasp of a few CRM program change management strategies, some practical tools and a little creativity, enterprise leaders can greatly improve their success rates.

- What can an enterprise do to prepare for CRM-driven change?
- What are examples of successful change management programs?

**Matt Goldman**



## Track 2: REINFORCE

- T** Technology Focused Sessions
- B** Business Focused Sessions

Over the past five years sales, marketing and service departments have invested primarily to meet operational goals, with scant regard for the customer. **Designed for delegates who have already commenced their CRM projects**, this track identifies what can be done to both extend and refine “departmental CRM” and to take a step back and begin to align these siloed worlds to create a single customer view and provide a consistent experience across channel and departments. We explore how to embed analytics into these functions. Those with existing knowledge of CRM projects seek ideas from others who have “gone live” through case studies, best practices and examples of what works best.

### Rebuilding Sales With Analytics and Performance Management

**B T**

Enterprises are seeking better insight and agility in optimizing sales resources to exploit recovering markets. Properly rebuilding sales capacity and incenting sales people will prove decisive. However sales departments have historically proved resistant to technological change. This presentation examines how sales analytics and sales performance management will yield sustainable competitive advantages.

- What will be the most valuable elements of sales analytics and sales performance management?
- What will prove the best approaches for deploying solutions to sales?
- How will the vendor landscapes for sales analytics and sales performance management evolve?

Michael Dunne

### Must-Have Analytic Capabilities for More Intelligent Customer Relationships

**B T**

This session will present a framework that shows how the most common CRM analytic techniques such as performance management and web analytics relate to organizational priorities. The presentation will help you to understand which analytical investments are most common, how to select the investments that will deliver the most value for your CRM strategy and the best practices that will ensure success:

- Which analytical investments support different business initiatives?
- How to build a business case for analytic investments?
- What are the best practices for selecting and deploying CRM analytic solutions?

Gareth Herschel

### Creating a Master Customer Database With Master Data Management

**T**

The interest level in Master Data Management (MDM) is high, but so is the hype. Leading organizations are investing in it to improve business processes and business decision making in the CRM and other application areas. Attend this presentation to learn more about MDM and how it can help your CRM strategy. Key issues include:

- Why organizations are investing in MDM and what has been achieved so far
- The best practices for MDM of customer data
- How the MDM of customer data market and technologies will evolve, and which vendors will win

John Radcliffe

### Improving the Quality of Your Customer Data: You Know it Makes Sense

**T**

Poor customer data quality is an often-overlooked business issue, but it can have a large negative effect on the success of your CRM strategy. This session describes how data quality issues hurt the business, and explores best practices and technology for achieving lasting improvements in data quality.

- Where and how does poor-quality customer data impact your business, and how can you justify taking action?
- What are the best practices that lead to successful customer data quality improvement programs?
- What is the role of technology in data quality improvement and how will data quality technology evolve?

John Radcliffe

### Enterprise Feedback Management: Surveying That Works for You and Your Customers

**B T**

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. Enterprise feedback management (EFM) solutions help organizations to understand their customer needs and perceptions by asking customers the right personalized questions at the right time on the right channel. This presentation examines:

- What is enterprise feedback management?
- 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?

Jim Davies

### Critical Capabilities in Multi-Channel Campaign Management

**T**

Multi-Channel Campaign Management is a critical connection point to an organization's customers and prospects in good times and bad. Investments in Multi-Channel Campaign Management in multiple areas such as segmentation, e-marketing, inbound/outbound fusion, event-triggered marketing and social CRM can increase both efficiency and effectiveness, while increasing customer experience.

- What will drive Multi-Channel Campaign Management for the next two years?
- How can organizations prioritize and leverage campaign management investment around efficiency and effectiveness?
- Which campaign management technologies will be best suited for world class campaign management in the medium term?

Adam Sarner



# Summit Agenda

## Track 3: OPTIMIZE



CRM is a journey. It is never complete. Its optimization requires constant evolution to meet evolving customer needs. As organizations struggle to differentiate themselves through their product or service offerings, it is their approach to CRM and the customer experience that can make a fundamental difference. A relentless focus on generating new ideas and embracing innovative concepts is an essential requirement for true CRM optimization. **Aimed at experienced CRM practitioners**, this track examines emerging approaches such as social CRM and advanced analytics and the social, technological and economic trends that will influence the next generation of CRM.

### Exploiting Social Knowledge for Web Self Service

**B T**

Customer self-service is an active area of technology innovation, with technologies such as natural-language search, automated e-mail response systems, and knowledge management in self service replacing labor-intensive interactions. This presentation explores what is in and what is out of self service and how to use social knowledge and community knowledge 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?
- Which vendors would you go to for self service and the management of social knowledge?

**Johan Jacobs**

### The Essential Emerging CRM Technologies Identified and Explained

**T**

Organizations struggle to find applications that can set their enterprise apart. CEOs avoid cutting front-line employees as much as possible, even as they increase the level of self-service as much as possible. To succeed, technologies will be needed that focus on personalizing marketing, engage customer communities, and deliver insight into the hands of customer-facing employees.

- How will organizations anticipate and respond to changing societal trends to improve customer engagement?
- How will CRM application software and processes change through 2012?
- How will the market for CRM evolve, and how will it impact vendors and buyers?

**Michael Maoz**

### Emerging Analytic Capabilities for Competitive Advantage

**T**

Which investments are delivering insights that drive competitive advantage? This session will outline investments such as real time decisioning and social network analysis that leading organizations are pursuing today that may become standard components of an analytic portfolio over the next decade. Key issues addressed include:

- What are the most important emerging analytic techniques for organizations to evaluate?
- Which forces will shape the way organizations deploy and use analytics over the next decade?

**Gareth Herschel**

### How Generation Virtual Changes CRM

**B T**

In 10 years, the largest influence on all customer purchases will be their online experience. Every customer will have an online persona driving your business relationship with that customer. 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 an online environment?
- How can companies develop online customer relationships by deploying the right social technologies?

**Adam Sarner**

### How to Boost the Customer Experience

**B**

Customers have never been so willing to drop a supplier on the basis of one poor experience, and then tell as many people as they can. This presentation examines customer experience management, outlines the project types that boost the customer experience, helps devise a strategy to advance the cause of the customer, and provides guidance on where to start.

- What is a customer experience and how is its improvement measured?
- Which projects deliver the most positive customer experiences?
- How are organizations creating a strategy for improving the customer experience?

**Ed Thompson**

### Web 2.0 + Mobile + E-Commerce + Social = eCRM2

**T**

The iPhone broke the glass ceiling for mobile Web and Web 2.0-empowered people, enabling them to express who they are, what they believe in and what they want. This convergence of trends has forever changed your organization's strategies for CRM over the Web. This session examines:

- How context-aware computing will change your industry's e-commerce and online CRM strategy
- How user-generated content can be used to build relationships with your industry's customers and increase sales
- How to develop an eCRM2 strategy for your industry

**Gene Alvarez**

*“Gartner allows me to forecast trends in CRM.  
I was also able to share the experience with other participants.”*

**Jaroslav Moch, IT CRM Team Leader, Polkomtel S.A**



## Track 4: WORKSHOPS

- T** Technology Focused Sessions
- B** Business Focused Sessions

Whether you are a newcomer to Customer Relationship Management, or a CRM “master”, it’s always beneficial to share ideas and best practices. This track includes a series of workshops addressing some of the key CRM challenges facing organizations today. Specifically designed to be highly interactive, these workshops will facilitate peer to peer exchange and networking — combined with the expert advice of Gartner’s analysts.

### Overcoming Organizational Inertia: Techniques to Drive Change Management for CRM **B**

Process and technology improvements do not yield desired results unless the users understand and commit to a new way of working. This workshop will give delegates an opportunity to identify and share best practices for driving end-user change management. Participants will explore the following issues:

- What are the top challenges with “change”?
- How can each of these be best overcome?

**Matt Goldman**

### Creating a Master Customer Database **B T**

This workshop focuses 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 engage with their peers 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**

### Improving SFA Adoption for Competitive Advantage **B T**

For years, sales organizations attempted to employ technology to improve sales results, with mixed results. Many projects were quickly crippled by low adoption rates. Such outcomes are intolerable in today’s uncertain business climate. During this workshop, participants will identify major issues that impact on Sales Force Automation (SFA) adoption and will work together to identify corrective measures. In summary, the following points will be addressed:

- What are the leading causes of consistently poor adoption of SFA?
- What approaches improve probabilities in successfully exploiting innovations in SFA?

**Michael Dunne**

### How Do You Ensure Executive Buy-In For CRM? **B**

Effective CRM requires a high degree of change to organizational culture, behavior and collaboration. It involves changes to policies and directives that impact the entire organization. Consequently it is crucial that senior executives buy into the vision of the true value of CRM to the organization and to transfer this message across all business units. However, getting executive buy-in for CRM initiatives is sometimes challenging. In this workshop we:

- Identify the key hurdles that prevent executive involvement in an organization’s CRM program
- Determine a set of associated best practices that will help overcome these hurdles and drive executive buy-in

**Gene Alvarez**

### Improving the Customer Experience **B**

This workshop will, through peer collaboration, focus on discovering best practices from the multitude of different ways to improve the customer experience. 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**



## Summit Highlights

Whether you are a newcomer to the world of CRM, an experienced practitioner already managing CRM projects, or a CRM expert, the Summit has something for you. With presentations from 12 Gartner experts, thought-provoking keynote speakers, real-life experiences from the case studies, opportunities to network with your peers and a forum for meeting the leading CRM technology providers, the Gartner Customer Relationship Summit will help you to accelerate your CRM agenda and drive more value from your investments.

**Please Note:** These workshops are limited to end users only.

Pre-registration is required, attendance is on a first come, first served basis and numbers are limited.

For more details go to: [ab.gartner.com/crm11i](http://ab.gartner.com/crm11i)





# Solution Showcase

## MEET THE TECHNOLOGY AND SERVICE PROVIDERS AT THE FOREFRONT OF CRM TECHNOLOGIES

The Summit helps you develop a “short list” of technology providers who can meet your particular needs. We offer you exclusive access to some of the world’s leading technology and service solution providers in a variety of settings. Visit the Solution Showcase, attend the Solution Provider Sessions and join in the Networking Reception for informal relationship building.

## SPONSORSHIP OPPORTUNITIES

If your organization is interested in sponsoring this event, please contact Chris Stewart for further details:

**Telephone:**  
+44 1784 267244

**E-mail:**  
[European.exhibits@gartner.com](mailto:European.exhibits@gartner.com)

### Premier



Autonomy, a global leader in infrastructure software for the enterprise, powers customer interaction solutions that improve and strengthen customer engagement by understanding and analyzing the meaning of all customer interactions, whether web, phone, email or chat. Autonomy captures and processes all interactions to extract pertinent information for compliance and risk management, customer service operations, and customer intelligence.

[www.autonomy.com](http://www.autonomy.com)



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Introducing XRM the concept of utilising Microsoft Dynamics CRM as a platform to allow organisations to rapidly develop many unique line of business applications, ranging from the simple to the most complex. xRM (Anything Relationship Management) is the natural evolution of CRM (Customer Relationship Management). In today’s dynamic business environment companies demand the ability to manage anything (X=anything), not simply relationships with customers.

[www.microsoft.com/uk/dynamics](http://www.microsoft.com/uk/dynamics)

### Platinum



Oracle (Nasdaq: ORCL) is the world’s leader in CRM with 5,000 CRM customers, and more than 5 Million CRM users. Customers rely on Oracle’s On Demand and On Premise CRM solutions, to empower end users while delivering dramatic improvements in their ability to identify, acquire, analyze, retain and serve their customers.

[www.oracle.com/crm](http://www.oracle.com/crm)



Webtrends standards-based technology and dedicated support lets organizations extend the rich, visitor-centric data collected by their Web sites to business systems throughout the enterprise. Marketers, BI analytics and others can combine online and offline data to gain one view of their customers and business — the integrated perspective that drives marketing and business success today.

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[www.cognizant.com](http://www.cognizant.com)



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# Registration

## How to Register

**Online:** [europe.gartner.com/crm](http://europe.gartner.com/crm)  
**Telephone:** +44 20 88792430  
**E-mail:** [emea.registration@gartner.com](mailto:emea.registration@gartner.com)



### Pricing

#### Early Bird Price

€1,895 + UK VAT  
*(offer ends 15 January 2010)*

#### Standard Summit Price

€2,195 + UK VAT

#### Public Sector Price

€1,695 + UK VAT

*Eligibility for the Public Sector Price will be verified, proof of public sector status will be required. Price cannot be applied retrospectively.*



### Why Register Early?

- Save €300 on the standard price
- Priority Gartner Analyst One-on-One booking with the analyst of your choice



### Refer a Colleague

If you know of a colleague who would benefit from this Summit experience and direct access please forward this brochure to them.

### Gartner Clients

A Gartner ticket covers both days of the Summit.

If you are a client with a query about tickets, please contact your Account Manager or e-mail [emea.events@gartner.com](mailto:emea.events@gartner.com)



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Teams that attend a Gartner Summit together gain a much richer experience of the event. Not only can they divide and conquer, attending all the sessions to maximize their learning, but they also have the added benefit of inviting a Gartner analyst to a team meeting — to facilitate a discussion or advise them on strategic initiatives and key projects. For this reason, organizations often take the opportunity to hold offsite team meetings and incorporate Gartner Events as part of their training programs.

Gartner Events has designed an experience that will help teams of 4 to 25 maximize their Summit experience while on-site and long after the event concludes.

#### Team Benefits:

- 1 Team meeting with a Gartner analyst (end-users only)
- 2 Optional team meeting(s) with select executives from vendor organizations
- 3 Advice and support on building personalized agendas for your team
- 4 10+ free audio sessions from the Gartner Events Multimedia On Demand product
- 5 Complimentary team lounge and meeting space (based on team size, terms and conditions apply)
- 6 Concierge service pre-event and on-site
- 7 Discounts on registration rates

#### Summit Team Discount Offers\*:

- 4 for the price of 3
- 6 for the price of 4
- 10 for the price of 7

*\* For full terms and conditions visit [europe.gartner.com/crm](http://europe.gartner.com/crm)*

To register a team please e-mail [EMEA.TeamSend@eventreg.com](mailto:EMEA.TeamSend@eventreg.com) or contact your Gartner Account Manager. Please note that teams must be registered at the same time and we can only guarantee availability of team benefits if the team is registered at least three weeks in advance of the event.



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