Gartner Customer 360 Summit 2013

May 1 – 3
San Diego, CA
gartner.com/us/crm

HOT TOPICS

• CRAFT A CRM VISION AND STRATEGY
• UNDERSTAND NEW ANALYTICS, METRICS AND BIG DATA
• GET MORE OUT OF MOBILE AND SOCIAL
• INCREASE SALES EFFECTIVENESS
• IMPROVE CUSTOMER SERVICE
• BALANCE DIGITAL AND TRADITIONAL MARKETING
Customer experience: The new competitive advantage

Mobile, social, cloud and analytics can improve customer service and satisfaction, make marketing more effective and increase sales. Join us to create your vision and strategy.

As technology races forward with increasing speed, customer expectations continue to mount, change and confound organizations. The rising sea of customer data combined with a tidal wave of new capabilities can be overwhelming. Yesterday’s best practices can’t address the tremendous opportunities and challenges of today’s customer resource management. At Gartner Customer 360 Summit 2013, May 1 – 3, now in San Diego, CA, you’ll get up to speed on everything you need to know to deliver a leading-edge customer experience that spans every point of engagement. We’ll define new best practices, sort the useful from the noise and help you shape a revolutionary vision and strategy for CRM success across the organization.

Benefits of attending

- Establish a customer experience vision and strategy
- Optimize integrated marketing campaigns
- Use mobile, social, cloud and analytics to increase sales
- Understand what defines great user experience design
- Harness big data and social media to improve customer service
- Prepare for data-driven, real-time, context-aware marketing
- Understand the expanding scope of new Web analytics

New for 2013

- New CRM vision and strategy track
- Analytics, mobile and social in every track
- Leading-edge research to calibrate your strategy
- Pre-event CRM boot camp for a solid foundation
- Keynote presentation by artist and author Erik Wahl
- Case studies showcasing CRM excellence
- New best practices in customer service, marketing and sales
- New location — San Diego, CA
The latest Gartner research covering all the components of world-class CRM

Delivering today’s world-class customer experience requires coordination that spans the organization, from customer service, sales and marketing to IT and business leadership. Comprehensive in scope, Gartner Customer 360 Summit is the only event where you can hear the latest Gartner research on every critical component of CRM success. Bring a team of colleagues to craft a CRM vision and strategy that includes the latest tools and tactics in each discipline (Team Attendance Program — page 19). Head back to the office ready to deliver improved results that drive business growth and earn customers for life.

CRM’s new opportunities

Enhancing the customer experience — delighting customers at every point of contact — is the new secret to sustained growth and competitive advantage. The new customer experience is mobile, social and informed by big data and analytics. It happens by phone, email, chat and video. To meet the challenges ahead, you need the latest Gartner insight on the technologies, vision, strategies and organizational changes that can help you succeed. Join us to prepare for the future of CRM.
KEYNOTE SESSIONS

Guest keynote

Erik Wahl
Graffiti Artist, Author, Entrepreneur and Philanthropist

The Art of Vision
As the business landscape changes, leaders must foster a steady stream of disruptive strategies and unexpected solutions to stay ahead. To thrive, executives and entrepreneurs need to rethink the habits that have made them successful, and challenge the conventional wisdom and industry models that have defined their world. Through this entertaining keynote, Erik Wahl uncovers new ways to make your organization more creative, innovative and profitable. But, more so, he helps attendees see the need to become better storytellers within and outside your organization.

Gartner keynotes

Gene Alvarez
Vice President and Conference Chair

Understand, Engage, Deliver: Earning Customers for Life
Gene Alvarez, Jim Davies, Ed Thompson
Empowered customers and rising customer experience expectations are creating new ways to compete and build lasting profitable relationships. Organizations want to know how to capitalize on this while leveraging all past customer relationship management investments.

Jim Davies
Director

Mark P. McDonald
Group Vice President and Gartner Fellow

Creating a Digital Edge in your Enterprise
Mark P. McDonald
How will digital technology support growth? It is a question every business and technology executive must address. The answer is to create a digital edge, one that turns customer experience and value into company revenue. New combinations of digital and physical resources create the types of customer experiences that support a real digital business model. This keynote discusses who is showing the way to creating revenue from digital resources and how to get real business results.

Ed Thompson
Vice President

Gartner and 1to1 Media CRM Excellence Awards Winners
Following the opening keynote, join Gartner and 1to1 Media as we celebrate our 2013 CRM Excellence Awards winners. Don’t miss this opportunity to meet these organizations and learn what makes their CRM programs successful!

Gene Alvarez
Vice President and Conference Chair

What to Do on Monday
Gene Alvarez
When you get back to the office you will have key project and priority decisions to make based on the information at this event. A panel of Gartner analysts led by Gene Alvarez looks at how to consider and prioritize what to do next.
Gartner analysts draw on the real-life challenges and solutions experienced by clients from 12,400 distinct organizations worldwide.

**CUSTOMER EXPERIENCE**

- Ed Thompson
- Jim Davies
- Gene Alvarez
- Bill Gassman

**CUSTOMER SERVICE AND SUPPORT**

- Michael Maoz
- Johan Jacobs
- Jim Davies

**INTEGRATED MARKETING**

- Kimberly Collins
- Adam Sarner
- Andrew Frank
- Bill Gassman
- Don Scheibenreif

**SALES EFFECTIVENESS**

- Robert P. Desisto
- Patrick Stakenas
- Chris Fletcher

**CRM STRATEGY AND VISION**

- Scott D. Nelson
- Gene Alvarez
- Partha Iyengar
- Michael Smith

**MOBILE**

- Ian Finley
- Ray Valdes
- Patrick Stakenas

**SOCIAL MEDIA/SOCIAL CRM**

- Jenny Sussin
- Adam Sarner
- Carol Rozwell
- Chris Fletcher

**DATA AND ANALYTICS**

- Gareth Herschel
- Bill Gassman
- Bill O’Kane

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CRM is about transforming the business. And that doesn’t happen by accident.

Scott D. Nelson
Managing
Vice President

When price is the same, customer experience is how you win.

Gene Alvarez
Vice President and Conference Chair
Delivering Great Customer Experiences
Today’s customers are in the driver’s seat. To get their attention and hold it requires an overall strategy that spans every touch. In this track, we share Gartner tools and insight to help you design, build and measure great customer experiences using the latest processes and technologies.

Enabling Great Customer Service and Support
What does it take to deliver truly great customer service in today’s hyper-engaged, multichannel world? These sessions look at best practices, technologies, vendors and analytics for ensuring customer service makes the most of every interaction.

Engaging Customers Through Marketing
Mobile, social and analytics — as well as event-triggered and inbound marketing techniques that leverage big data — are all helping to drive innovation, engage customers and set organizations apart from the competition. This track looks at what works and how to balance innovation with traditional tactics.

Increasing Sales Effectiveness
From opportunity and performance management to pricing, a new wave of technologies, vendors and best practices are improving sales effectiveness — and driving growth. In these sessions, Gartner analysts sort through the maze of options to identify those that truly make an impact.

NEW! Creating a CRM Vision and Strategy
To consistently hear, engage, respond to and delight your customers requires a comprehensive customer relationship vision and strategy. In this track, we take on the challenge with the latest analyst insights on crafting and implementing a successful CRM strategy.

Analytics, mobile and social — Covered in all five tracks!
Get the latest Gartner recommendations for mobile, social and analytics throughout the conference from each track’s perspective. We’ll look at leading-edge case studies, best practices, technology options and more.
Three days that will transform your approach to CRM

Perfect the customer experience at every touchpoint
Today’s competitive advantage depends on the quality of the customer experience you deliver. Join us for five tracks covering the complete picture.

Use new analytics and customer data to revolutionize CRM
Prepare to lead the way in data-driven marketing, sales and customer service. Forge a bond of shared goals with IT and business leaders to make it happen.

Lead the way in customer service and support
Use social, mobile, video, big data, new tools and new types of customer data to significantly improve customer service. Apply new metrics to demonstrate value and impact.

Embrace an exciting new era in marketing
Improve customer acquisition, retention and loyalty with a combination of traditional and leading-edge multichannel marketing techniques, including mobile, social and analytics.

Maximize sales effectiveness and efficiency
It’s time for sales to go mobile and social, tap new lead and performance management techniques, and leverage new tools powered by the cloud, big data and analytics.

Develop a forward-looking vision for CRM
Innovation is changing how you interact with customers as well as what customers expect. It’s time to craft a vision for the future and a strategy to get you there.

Learn from trusted, independent Gartner research
More than 20 Gartner analysts will be on-site to present their latest insights and recommendations, answer questions and meet one-on-one about your CRM challenges.

ATTEND TWO EVENTS IN ONE WEEK
Double the value of your trip to San Diego! Arrive early for Gartner Portals, Content & Collaboration Summit 2013, April 29 – May 1, to kick off a week focused on exceeding customers’ and users’ expectations. The latest Gartner recommendations will help you:

• Leverage content in the social sphere
• Tap the potential of mobile applications
• Deliver a better user experience
• Prepare for a context-aware future
• Enable social collaboration that works

Save when you attend both conferences. Learn more at gartner.com/us/pcccrm.

Visit gartner.com/us/crm for agenda updates and to register
### TUESDAY, APRIL 30

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
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<tbody>
<tr>
<td>3:00 p.m.</td>
<td>Registration</td>
</tr>
<tr>
<td>3:30 p.m.</td>
<td><strong>BC1. Boot Camp: Who Cares About CRM in Your Organization?</strong> (3:30 – 3:50 p.m.)</td>
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<tr>
<td>4:45 p.m.</td>
<td><strong>BC4. Boot Camp: Why Invest in CRM?</strong> (4:45 – 5:05 p.m.)</td>
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<tr>
<td>5:45 p.m.</td>
<td><strong>Solution Showcase Reception</strong></td>
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### WEDNESDAY, MAY 1

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
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<tr>
<td>7:00 a.m.</td>
<td>Registration</td>
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<tr>
<td>7:00 a.m.</td>
<td><strong>Fast Forward: CRM Solutions in 60 Seconds — Breakfast With the Sponsors</strong></td>
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<tr>
<td>8:30 a.m.</td>
<td><strong>K1. Gartner Opening Keynote</strong> Understand, Engage, Deliver: Earning Customers for Life** Presentation of 2013 Gartner and 1to1 Media CRM Excellence Awards**</td>
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### THURSDAY, MAY 2

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
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<tbody>
<tr>
<td>10:15 a.m.</td>
<td><strong>A1. Customer Experience Is the Next Competitive Frontier</strong> Partha Iyengar, Ed Thompson</td>
</tr>
<tr>
<td>11:30 a.m.</td>
<td><strong>K2. Guest Keynote</strong> The Art of Vision** Erik Wahl, Graffiti Artist, Author, Entrepreneur and Philanthropist**</td>
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<tr>
<td>12:30 p.m.</td>
<td><strong>Networking Lunch and Solution Showcase</strong></td>
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<tr>
<td>2:15 p.m.</td>
<td><strong>W1. Workshop: Setting the Customer Analytic Strategy</strong> Gareth Herschel</td>
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<tr>
<td>2:30 p.m.</td>
<td><strong>A2. Creating a CX-centric Organization and Skill Set</strong> Partha Iyengar</td>
</tr>
<tr>
<td>3:40 p.m.</td>
<td><strong>Solution Provider Sessions</strong></td>
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<tr>
<td>4:50 p.m.</td>
<td><strong>A3. Real Use of Social to Improve the Customer Experience</strong> Jenny Sussin</td>
</tr>
<tr>
<td>5:50 p.m.</td>
<td><strong>Solution Showcase Reception</strong></td>
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### FRIDAY, MAY 3

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<tr>
<th>Time</th>
<th>Event</th>
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<tr>
<td>8:00 a.m.</td>
<td><strong>W7. Workshop: Attribution Modeling</strong> Andrew Frank</td>
</tr>
<tr>
<td>8:15 a.m.</td>
<td><strong>A7. Top 10 Mistakes in User Experience (UX) Design Projects</strong> Ray Valdes</td>
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<tr>
<td>9:30 a.m.</td>
<td><strong>Solution Provider Sessions</strong></td>
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<tr>
<td>10:15 a.m.</td>
<td><strong>A8. Case Study TBA</strong></td>
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<tr>
<td>11:30 a.m.</td>
<td><strong>K4. Gartner Closing Keynote</strong> What to Do on Monday** Analyst Panel Moderated by Gene Alvarez, Vice President and Conference Chair**</td>
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<td>Time</td>
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<td>8:00 a.m.</td>
<td>Networking Breakfast</td>
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<tr>
<td>9:30 a.m.</td>
<td>Solution Provider Sessions</td>
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<tr>
<td>10:15 a.m.</td>
<td>Workshop: Setting the Customer Top 10 Mistakes in User Experience Design Projects</td>
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<tr>
<td>11:30 a.m.</td>
<td>Michael Smith, How to Build the Business Case for Investments</td>
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<tr>
<td>2:00 p.m.</td>
<td>Workshop: Creating a Customer Experience Vision</td>
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<tr>
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<td>The Art of Vision, Frontiers</td>
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<tr>
<td>4:45 p.m.</td>
<td>Boot Camp: Who Cares About CRM in Delivering Great Customer Experiences</td>
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<tr>
<td>5:25 p.m.</td>
<td>Magic Quadrant, Panel: Magic Quadrant Panel</td>
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**Customize Your Agenda**

Each Gartner session has been identified with icons to help you locate the sessions that give you the most value.

**Maturity Level**

- **F Foundational**: Offers the necessary understanding and first steps to those in the early stages of initiatives.
- **A Advanced**: Uses complex concepts requiring foundational knowledge and prior experience to take initiatives to the next level.

**Focus**

- **T Tactical**: Provides tactical information that can be used straightaway, with a focus on how-to’s, do’s and don’ts and best practices.
- **S Strategic**: Focuses on the strategic insight supporting the development and implementation of an action plan.

**Virtual Tracks**

(See session descriptions for tagging.)

- **A Analytics**: Offers strategies and best practices for turning data into actionable strategies.
- **S Social**: Examines the impact and opportunities of social media on all facets of your CRM strategy.
- **M Mobile**: Focuses on delivering superior customer experiences and driving productivity via mobile devices.

Visit gartner.com/us/crm for agenda updates and to register
A1. Customer Experience Is the Next Competitive Frontier
At leading enterprises, a relentless focus on the customer and delivery of satisfying customer experiences is generating remarkable customer loyalty, revenue growth and increased valuations. Deriving these benefits requires a customer-centric, outside-in approach throughout the enterprise that focuses on a customer experience (CX) value chain. This session provides key guidelines and prescriptions to achieving this CX-centricty.

Partha Iyengar, Ed Thompson

A2. Creating a CX-centric Organization and Skill Set
This presentation discusses the strategy, organization and key skills needed to achieve CX excellence. Key among these are the skills needed to define and deploy a customer experience value chain to replace the traditional Michael Porter–defined “functional value chain” that most enterprises have today.

Partha Iyengar

A3. Real Use of Social to Improve the Customer Experience
The use of social media to improve the customer experience has evolved rapidly over the last four years. Some organizations are treating social as a channel; others as a completely new business model. Many are experiencing failures, but the lessons learned from the real successes can be leveraged by those who attend this session.

Jenny Sussin

A4. Creating Mobile Apps Your Customers Love (or Hate)
This session examines why customers rate mobile applications well or poorly, and how to create mobile apps that will not only support your business and differentiate your brand or products but also delight your customers.

Ian Finley

A5. How to Build the Business Case for Investments Designed to Improve the Customer Experience
Challenging economic times persist. In response, business executives are requiring additional facts prior to making any investment decisions. This presentation provides the sources of facts, and describes the process for quantifying the benefits and lowering the risk of investments designed to improve customer experience.

Michael Smith
The customer voice takes many forms, from the completion of a corporate survey to a throw-away comment on Twitter. Each has merit. The ability to collect, analyze and act upon these diverse feedback channels in a holistic way is a key challenge for organizations that are aiming to improve the customer experience.

Jim Davies

A7. Top 10 Mistakes in User Experience (UX) Design Projects
Every UX project experiences mistakes. Some of these mistakes are small, narrow-scope, surmountable annoyances. Others run broad and deep, and can prove fatal to the success of the project. For example, choosing a specific promising-but-immature technology may be a mistake, but the real error is to make the selection decision at the start of the project, before the requirements are known.

Ray Valdes

A8. Case Study TBA

TRACK B

Enabling Great Customer Service and Support

B1. The Next Generation of Customer Engagement
IT and customer service leaders are rethinking the role of customer service in response to CEO directives and new customer expectations that trace back to social media adoption and an increasingly mobile customer. This session looks at transformational customer support processes, with consistent customer treatment across departments. We present and prioritize the top CRM customer support applications for the customer-centric enterprise, and how to measure the success of a cross-channel support team.

Michael Maoz

B2. Getting It Done: Social Customer Service in Action
Is anyone else sick of hearing the word “social?” We take the fluff out of social by moving from the identification of business objectives to the creation of tactics and best practices we’ve seen in social customer service that are intimate, efficient and realistically scalable.

Jenny Sussin

B3. Optimizing the Contact Center Workforce: The Key Service Experience Influencers
For many organizations, success or failure lies in the hands of their least-motivated, lowest-paid and most-likely-to-defect segment of employees — the agent. By optimizing the agent life cycle — recruitment, scheduling, evaluation and training — service organizations can improve their performance and elevate the customer experience.

Jim Davies

B4. Is Mobile Customer Service Right for You?
Mobile is no longer an adjective to describe only cellular handsets and networks, but is evolving into a customer service differentiator. The mobile customer service market, however, remains confused and complex as organizations struggle to cope with large numbers of new devices, services and applications.

Johan Jacobs

B5. What’s the Big Deal With Big Data for Customer Service?
The growing volume, variety and velocity of data will change both customer expectations about the role of customer service and the way organizations deliver service. This session examines the transformation that big data will enable (or impose on!) customer service organizations, and provides examples and best practices of the organization, skills and technologies that will deliver success.

Gareth Herschel, Michael Maoz

B6. Case Study TBA
SESSION DESCRIPTIONS

This session is a rundown of the top analytic techniques and the value they deliver to organizations in terms of acquisition, growth and customer retention. It includes discussion of predictive analytics, social analysis and real-time recommendations.

*Gareth Herschel*

A

B8. Move Over, Web: Here Comes Video Customer Service
With the increasing power of cameras and the greater availability of bandwidth, companies are getting into the business of enabling more and more video-type services not only for Web-linked devices but also for the mobile phone. Attend this presentation for insight into how you can augment your existing Web-based services with video.

*Johan Jacobs*

A  

C2. Applying Pace Layers to Integrated Marketing Management
CMOs must drive competitive differentiation and innovation, while CIOs are focused on standards and functional integration. There are various applications that support different types of marketing processes. This presentation explores how pace layers can be used by CMOs and CIOs as a framework to balance the marketing applications portfolio.

*Kimberly Collins*

A  

C3. Multichannel Campaign Management: A Digital Transformation
Marketers are shifting traditional marketing strategies around campaigns and moving toward digital marketing, a two-way approach that acts as a decision tool involving and anticipating customers’ wants and needs. This presentation focuses on a digital approach, including social, mobile and the emerging Internet of Things using campaign management to orchestrate the complexity of customer interactions.

*Adam Sarner*

A  

C4. The Future of Marketing Is Data-Driven
Big data is fundamentally changing the nature of marketing. This session presents the Gartner model of the four practices comprising data-driven marketing, and key drivers and impediments to adoption. Learn how data can make marketing more effective and accountable, and how IT and business can align to resolve issues of privacy and scale.

*Andrew Frank*

A  

C5. Web Analytics: Its Expanding Scope and Significance
The Web analytics ecosystem is expanding beyond simple site analysis to address social and mobile channels, measure campaign attribution and define customer segments. This session examines new techniques, solutions and ways to hire and organize a digital analytics team for better effectiveness.

*Bill Gassman*

A

C6. What’s Next for Social Marketing?
Social marketing is a business strategy that mutually benefits digital communities by ceding levels of control and fostering engagement, while generating opportunities for marketing and the rest of the organization. This presentation focuses on the drivers, the multiple use cases and technology for social marketing.

*Adam Sarner*

A  

C7. Case Study Panel: Match Game 2013 — Social CRM and You
There is an overabundance of expertise in the social for CRM space, but the information we all have is often situational and unique … or is it? In this adaptation of the classic ’70s game show, Match Game 2013 features attendees who have volunteered to share some of their best and worst practices with the audience. Come see if any of yours match up!

*Moderated by Jenny Sussin; Panelists include Vala Afshar, Enterasys Networks*

A  

TRACK C

Engaging Customers Through Marketing

C1. Optimizing Marketing Performance
The marketing mix continues to expand, but marketing budgets remain tight. High-performance marketing organizations will have to decrease marketing costs while driving top-line growth. This presentation provides guidance on how to increase return on marketing investment (ROMI).

*Kimberly Collins*

A

C7. Case Study Panel: Match Game 2013 — Social CRM and You

C6. What’s Next for Social Marketing?

C2. Applying Pace Layers to Integrated Marketing Management

C3. Multichannel Campaign Management: A Digital Transformation

C4. The Future of Marketing Is Data-Driven

C5. Web Analytics: Its Expanding Scope and Significance


B8. Move Over, Web: Here Comes Video Customer Service

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A future is coming where shoppers will get personalized real-time offers while they are in store, powered by context-aware computing. In this session, Gartner lays out the ecosystem for this future, the associated benefits and risks, and what you can do to get ready for it.

*Don Scheibenreif*

**D1. Mobile, Social, Cloud and Analytics Power the Future of Sales**

Sales organizations are facing a number of simultaneous disruptive forces threatening to make current deployments of limited use. This presentation will explore the combined impact of mobile, social, cloud, and big data on SFA applications and vendors.

*Robert P. Desisto*

**D2. Using Sales Performance Management to Significantly Increase Revenue**

You are well on your way with CRM; now look closer at what sales performance management (SPM) can do to help in exceeding revenue and profitability goals. Executing on an SPM strategy involves difficult changes to company culture and the sales organization along with the technology IT deploys. This session is a must if your company has the sincere desire to increase revenue and improve the sales organization once and for all.

*Patrick Stakenas*

**D3. Empowering Salespeople With Mobile Sales Applications: Anytime, Anywhere**

Smartphones and tablet-powered processes will have the most significant impact on a salesperson’s productivity and effectiveness since the introduction of the cell phone. Laptops are quickly becoming dinosaurs, and tablets are now seen as a staple for every mobile-based salesperson. The challenge is how does a sales organization move from a rigid, low-battery-life, heavy laptop-based world to a world of endless mobile opportunity? Our presentation analyzes how sales organizations can better mobilize their salesforce.

*Robert P. Desisto*

**D4. Social CRM's Day Is Coming for Sales**

Examine the realities and myths of how social media is impacting the sales organization, and how social CRM may be a bit off in the distance as it relates to driving leads and closing sales. We take a closer look at how social CRM can impact the sales organization in the short term, and what best practices sales organizations are employing to get ahead of the game.

*Patrick Stakenas*

**D5. A Vision for E-Commerce and the Trends That Will Shape Your Strategy**

The customer experience is the sum of all interactions. Successful companies are redefining their e-commerce processes and platforms as they respond to the empowered customer, but this is simply the first wave of change.

*Gene Alvarez*
D6. Move Lead Management From Good to Great to Maximize Revenue
Every organization invests in lead generation, but relatively few are able to maximize the revenue potential of those leads. Attendees will come away from this session with an understanding of the best practices, tools and technologies required to maximize lead management ROI.

Chris Fletcher

D7. Case Study: Using Sales Coaching to Enhance Sales Effectiveness
The days of discontinuous sales training and monthly one-on-ones are vanishing. New methods and mobile coaching solutions that allow close monitoring and assessment provide sales leaders and HR more from their sales development dollars. Learning retention, measured improvements, and significantly improved customer interactions are proof that coaching works.

Patrick Stakenas

D8. Case Study: Leveraging Mobility to Boost Sales
Learn from sales organizations that have leveraged emerging mobile device platforms to transform sales processes for improving business results.

Robert P. Desisto

E1. How Different Could Your Firm Be in 2020?
A lot is changing in the world of CRM, all at the same time. Social media, mobile, big data — it all seems to be coming at a faster and faster rate. The problem for many firms is that they have just started to adapt to one when a new trend hits. It’s better to step back and start to envision a future state for your firm, and then figure out how you will get to it. In this session, we talk about what your firm might look like eight years from now, and how that will help you navigate all the simultaneous changes.

Scott D. Nelson

E2. Establishing a Vision and Strategy
The first two building blocks of the Gartner Eight Building Blocks of CRM are vision and strategy. Sounds nice, but most firms don’t really know what that means. In this session, we look at what a vision and strategy for being customer-centric really means, and how to go about setting both in place to guide your CRM decision making.

Scott D. Nelson

E3. Turning Big Data Into Actionable Customer Insights and Opportunities
Companies have more customer data, both structured and unstructured, than ever before. Big data presents both challenges and opportunities to customer-centric strategies. This presentation describes how companies can not only manage customer-related big data but also leverage customer analytics to identify customer patterns insights and develop actionable customer opportunities.

Kimberly Collins, Bill O’Kane

E4. Customer Analytics 2020: Moving Beyond Traditional Metrics
The possibilities of customer analysis will change dramatically over the next few years as the potential of big data influences organizational strategies and customer expectations. This session examines the future of customer analytics and outlines the current opportunities and best practices that they present to organizations.

Gareth Herschel
E5. Organizational, Cultural and Technological Changes
CRM is not about installing a piece of software. It is about changing from a product-centric company to a customer-centric customer. As such, firms need to understand the nontechnology changes that are going to occur. In this session, we look at the organization and cultural changes that firms will have to deal with, even as they change the technology basis for dealing with customers.

Scott D. Nelson

E6. The Clash of the CRM Megavendors
No software company has a global-class CRM application scalable for both sales and customer support. No vendor will have a cloud-based CRM software suite through 2016. The demands of big data, mobile customers, and social media have added to, not eliminated, requirements for robust customer support for Web and contact center. To best select products from application megavendors, and to negotiate with them, we examine their current and future capabilities, including technologies and partner ecosystems.

Michael Maoz, Ed Thompson

E7. Turning Mobile Innovation Into Business Value
This session explores the new consumer-facing business opportunities that will emerge as today’s mobile apps and websites evolve into advanced contextual interactions involving multiple devices, multichannel applications and new user experiences, and exploit new technologies such as NFC and indoor location.

Ian Finley

E8. Busting the Myth That People Resist Change
Conventional wisdom tells us that people resist change. Conventional wisdom is wrong. This presentation explores recent advances in neuroscience research and uses them as the basis for developing an updated model of organizational change.

Carol Rozwell

Workshops
Preregistration required

W1. Setting the Customer Analytic Strategy
This workshop provides attendees with the opportunity to participate in a walk-through of the process of defining the customer analytic strategy for their organization.

Gareth Herschel

W2. Uncover Hidden Profits With Price Optimization and Configure, Price and Quote (CPQ) Technology
Industry leaders are integrating price optimization and CPQ technologies with CRM and sales force automation applications to increase revenue and margin. Attendees will bring back a portfolio of tools and ideas to use within their own organizations.

Chris Fletcher

W3. Creating a Customer Experience Vision
This workshop, through peer collaboration, focuses on discovering best practices for devising a vision for a customer experience initiative.

Gene Alvarez
W4. Assess the Customer Experience (CX) Maturity of Your Organization
Workshop attendees leverage the Gartner Customer Experience Maturity Assessment Tool to assess their organization’s maturity prior to embarking on a CX initiative.

Partha Iyengar

W5. Getting Real Value Out of Social
Many leaders of social initiatives are confused by a dizzying array of social tools and approaches. They think if they pick the right tool or build the right Facebook page, their initiatives will succeed. In this workshop, participants learn why clearly defining “purpose” is a critically important step in developing a social strategy that drives measurable business results.

Carol Rozwell

W6. How to Evaluate Your Website on Its Customer Service Ability
Many organizations invested huge resources in building out self-service websites but wonder why customers are not using them. This workshop explains why customers are not using your self-service solutions, exposes the missing link of what you should fix and gives you the tools to measure the customer service ability of your self-service websites.

Johan Jacobs

W7. Attribution Modeling
Attribution modeling may be one of the most impactful applications of big data in the enterprise. Marketers are questioning traditional spending patterns as new data-driven marketing suites and platforms arm them with tools to evaluate alternatives. In this workshop, we look at the questions marketers are trying to answer and compare results.

Andrew Frank

W8. Use the Consumer Goods Shopper Marketing Model to Leverage Technology in Your Customer’s Path to Purchase
Shopper marketing is a growing and evolving discipline in consumer goods manufacturing that recognizes that the purchaser (“shopper”) is different from the user (“consumer”). In this workshop we take the consumer goods shopper marketing “path to purchase” model and apply the principles, associated technology enablers and concepts like context awareness to your particular customer marketing challenge, regardless of industry.

Don Scheibenreif

AUR1. Developing a Strong Partnership Between IT and Marketing
With technology permeating almost every aspect of marketing, the relationship between IT and marketing is becoming increasingly critical to success — and it is one of the least-developed relationships in a company. In this roundtable, participants discuss what keeps marketing and IT separate in their organizations, and their experiences with overcoming those barriers to bridge the gap between these two important functions.

Don Scheibenreif

AUR2. Practical Ways to Harness Big Data and Social Media to Improve Customer Service
Getting beyond the hype, we share insights on the practical steps to use big data and social media to improve customer service, and how to measure results.

Michael Maoz
AUR3. Best Practices in Social
In this roundtable discussion, be prepared to share a best practice you’ve established while building out your social for CRM plan. We also want to know what didn’t work, even though you were sure it would.
Jenny Sussin

AUR4. Digital Marketing Analytics
There is no shortage of analytics tools in a digital marketing organization, but many struggle to use them effectively. Why do some organizations struggle while others succeed? Come to this roundtable ready to share your successes and continuing issues with analytics.
Bill Gassman

AUR5. Best Practices for Improving Your Customer Analysis
Be prepared to share one thing you are doing that works well in customer analysis, and ask for help with one thing that’s a struggle.
Gareth Herschel

AUR6. Mastering Your Customer Data and Creating a Single Source of Truth
This roundtable focuses on how to create a single source of truth for customer data within the organization, using master data management (MDM) disciplines and technologies. This “single view of the customer” will enable more joined-up business processes, better customer experiences and better customer analytics.
Bill O’Kane

AUR7. Impact of Gamification on Sales
Companies are flocking to programs to motivate, reward and recognize through new methods that don’t always involve compensation. Gamification is being used to change behavior and drive improved results on what are often non-revenue-related accomplishments. Learn how companies are adopting gamification, as well as new and exciting best practices to increase revenue and heighten the customer experience.
Patrick Stakenas

AUR8. Crossing the Chasm of Cross-Channel User Experiences
It’s not enough to provide multichannel access. Modern applications increasingly need to orchestrate user interactions across channels: sequential, parallel and complementary.
Ray Valdes

AUR9. E-Commerce and Digital Customer Experience
In this roundtable, attendees examine the role of e-commerce in the growing digital customer experience.
Gene Alvarez

Many projects fail to meet their originally stated business objectives. A root cause of this problem is the lack of a common understanding among the key stakeholders of the specific project objectives. We discuss how to ensure a common understanding of a project’s objectives among the key stakeholders.
Michael Smith

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