

Gartner Customer 360 Summit 2014

May 19 – 21 | Orlando, FL | gartner.com/us/crm

Thriving in the Digital Age: Elevated Experiences, Interactions & Analytics

Trip Report

Gartner Customer 360 Summit 2014 was held May 19 – 21, at the Gaylord Palms Resort in Orlando, FL. This report provides a summary of the conference and highlights key take-aways.

Overview

Increasingly mobile and social, today's empowered customers are shattering the status quo in CRM. This year's conference took a comprehensive look at how to rapidly evolve your customer vision and strategy to meet and exceed new expectations. Attendees learned how to deliver an exceptional customer experience in every channel, at every point of contact, and seize emerging opportunities to drive growth and loyalty.

After a pre-event CRM boot camp got early arrivals quickly up to speed, Gartner analysts took the stage to present the latest insights and case studies in success. Drawing on hundreds of hours of collective experience consulting with organizations around the world, they explored leading-edge strategies for every aspect of today's complex digital-era customer relationships, including customer engagement, customer analytics, the customer support center, marketing, sales and leadership strategies for the customer-centric organization.

Create big-picture, enterprisewide strategies

- Craft and implement an enterprisewide customer experience vision and strategy.
- Gain a better understanding of the customer with the latest analytics and information management strategies.

Implement next steps for advancing key disciplines

- Leverage new capabilities to tap new marketing opportunities and improve sales effectiveness.
- Evolve customer service into a powerhouse of mobile and social engagement.



The Gaylord Palms Hotel



Jim Davies

Save the date

Gartner Customer 360 Summit 2015

9 – 11 September 2015

San Diego, CA

gartner.com/us/crm

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Key take-aways

- 1 In the digital age, every interaction has to wow the customer**
With few differentiators left and empowered customers eager to share, a standout customer experience matters more than ever.
- 2 An enterprisewide CRM vision will see you through rapid change**
To thrive in a climate of high-speed change, craft an enterprisewide customer experience vision and a strategy to make it real.
- 3 Analytics is a game-changer, but implementation can be tricky**
Customer analytics can enable richly relevant interactions. The best results depend on leading-edge information management strategies.
- 4 To seize new marketing opportunities, integration is key**
Integrated multichannel marketing hubs orchestrate efforts across touchpoints to maximize results and avoid a disjointed customer experience.
- 5 New technologies are forcing a customer service overhaul**
With sensors, location services, Web self-service, Twitter, Facebook, video and mobile-everything in the mix, customer service needs a major reboot.
- 6 Personal analytics promise new opportunities**
The quantified self will soon have a major impact on your customer relationships. Now is the time to consider what it will mean for your business.
- 7 Social engagement must be strategic to deliver results**
Anchoring social strategy firmly to organizational and performance goals helps it live up to its potential.
- 8 New mobile sales tools can deliver real business value**
The latest mobile technologies are enabling new value-added selling processes, improving sales effectiveness and helping sales teams achieve revenue targets.
- 9 For just-right personalization, look to adaptive analytics**
Adaptive analytics is taking personalization — balanced with privacy — to a whole new level, creating a “segment of one” that makes customers feel valued.
- 10 Customer-facing analytics is a win-win for CRM**
Customers want greater transparency. Delivering it enables greater personalization and can create new data-driven business opportunities.

Keynote sessions

Thriving in the Digital Age and the Customer-Driven Enterprise

Gene Alvarez, Leigh McMullen

Creating a customer-driven enterprise in the digital age comes with a unique set of challenges. New technologies are arriving faster than organizations can absorb them, and customers have taken control of their own experiences. This environment is creating technological as well as cultural imperatives for enterprises and their leadership. Setting the tone for the conference, this opening session outlined how organizations — and CIOs, sales, marketing and customer service — are changing to meet these challenges and thrive.

- How do you create a digital-era customer-centric organization?
- What are the technologies supporting a leading-edge digital customer experience?
- How do organizations make it out of the culture chasm and meet the customers on their terms?
- How do you build organizations powered by purpose, and create “Leaders of One”
- Learn the difference between being real vs. a poser when it comes to customer-driven culture

Customer Engagement in the Digital Future

Hung LeHong

Analyst Hung LeHong explored how technology will change customer engagement and what enterprises should do about it. Big data, mobile, cloud, social and other technologies will change how customers expect to be engaged. This will require enterprises to change how they sell to, interact with and serve their customers. As the digital age takes hold, enterprises must find ways to bring new channels, devices and points of contact into the fold. LeHong shared 10 new realities of customer engagement. Among them were:

- You won't be able to automate a relationship, but you will need to automate responses
- Real-time transparency will be a must-have
- Personalization — intersection between customer history, context awareness and intent — is here to stay
- Privacy can be bought, trust must be earned, and security will be expected at all times

Where Good Ideas Come From: The Natural History of Innovation

Steven Johnson

Guest keynote speaker Steven Johnson addressed urgent and universal questions: What sparks the flash of brilliance that solves a problem? How does groundbreaking innovation happen?

Delivered in his infectious, culturally omnivorous style, using his fluency in fields from neurobiology to popular culture, Johnson painted an exhilarating and encouraging portrait of how we generate the ideas that push our careers, our lives, our society and our culture forward.

The bestselling author of “Where Good Ideas Come From” and host of the new television show, “How We Got to Now,” premiering this fall on PBS, Johnson left us with a fresh understanding of the spirit and practice of innovation: “Chance always favors the connected mind.”



Gene Alvarez
Managing Vice
President,
Conference Chair



Leigh McMullen
Managing Vice
President



Hung LeHong
Vice President and
Gartner Fellow



Steven Johnson
Author and host of the
upcoming PBS Series,
“How We Got to Now”

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Top-of-mind concerns (what attendees asked about)

- How do I deal with the epic change and disruption coming my way, thanks to the combined ongoing impact of mobile, social, cloud, big data and analytics?
- How do I leverage new tools, technologies, capabilities, channels and devices for more effective customer engagement?
- How can I gain a better understanding of the customer? Is a single view of customer data finally a realistic goal? How can analytics improve CRM?
- How can customer service best take advantage of mobile, social and other new means of customer interaction?
- How can I create and implement an enterprisewide vision for the customer experience we want to deliver?
- How can I align marketing efforts spanning a variety of channels, and see that they support each other and interconnect to create synergies and drive results?
- How can I build a solid business case for CRM investment, get senior leadership on board and show how it can contribute to business goals?



Natalie Severino @SeverinoNatalie · May 21

A 5% increase in retention can positively impact profitability from 25-100%. @toddberkowitz says market to your customers.

#GartnerCRM



Who won the selfie contest?



Gene Alvarez

versus



Jenny Sussin

Jenny is claiming victory ... Gene may or may not dispute at a later date.

Top 10 most-attended sessions

D2. Big Data Strategy Essentials

Kurt Schlegel

A5. To the Point: From Out to In — Customer Process Redesign

Ed Thompson

E2. The CRM Megavendors Clash as Business Needs Threaten Their Relevance

Michael Maoz, Ed Thompson

A1. The Customer Experience Scenario: The Magnificent Seven

Ed Thompson

A4. Act as One: How to Deliver an Outstanding Multichannel Customer Experience

Gene Alvarez

E1. Defining a CRM Vision and Strategy

Scott Nelson

B6. To the Point: The 10 Habits Of Highly Effective Customer Service Organizations

Olive Huang

A3. To the Point: Listen to the Voice of the Customer — Now Louder Than Ever

Jim Davies

B1. Building a Customer Engagement Center That Wows Customers

Michael Maoz

B2. The Anatomy of a Social Customer Service Organization

Jenny Sussin

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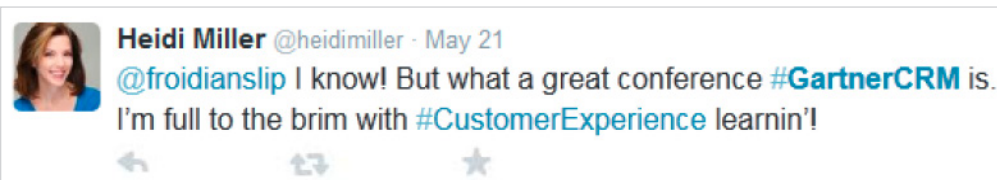
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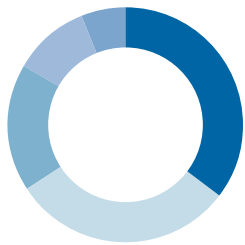


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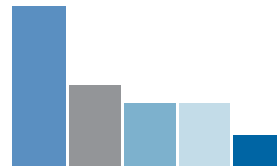
Snapshot of attendees

Top 5 job titles



30% Director
26% Manager
15% Vice President
9% C-level
5% Analyst

Top 5 industry sectors



20% Banking/Finance and Insurance
13% Manufacturing
10% Healthcare
10% Services
5% Government

Sample titles of some of your fellow attendees

Vice President,
Customer Experience

Director, CRM Business
Process Management

Solution Architect

Supervisor,
Registration Services

Director, Contact
Center Development

Manager,
Process Management

Operations Leader Strategy
and Execution

User Experience Lead

Director, e-Commerce and
Digital Marketing

Senior Vice President
Corporate Communications

Director of CRM Application
Development

Group Marketing Manager

26% of you went with colleagues to divide and conquer the agenda!



Yan Rozovsky @YanRozovsky · May 20

Can't agree more @Gartner_inc: Call to action #GartnerCRM 12 ways to create a customer driven culture pic.twitter.com/tdam78DpLd



Beth Torrie @bethtorrie · May 20

Either everyone wants advice from the wizard @AdamSarner or a selfie #GartnerCRM another great session!!

pic.twitter.com/YzlaXyK62U



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Post-event resources

Customizable post-event worksheet

Take a moment to complete your own post-event trip report, a valuable resource for future reference and a great way to share with colleagues what you learned. [Click here](#) to access the trip report worksheet.

Learn more with relevant research

Want to learn more about the topics that interest you most? Turn to the end of each session presentation for a list of related Gartner research notes. Select Gartner research is available on demand at gartner.com.



Heidi Miller @heidimiller · May 19

5 skills that make a good social #custserv agent: social dialogue, brand communication, comm strategy, persuasion, management

#GartnerCRM



Vala Afshar @ValaAfshar · May 19

A customer-centric services and support mantra: "dear customer, it's our problem until it's no longer yours." #GartnerCRM



5 – 9 October | Orlando, Florida

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We'd like to congratulate the winners of the 2014 Gartner and 1to1 Media CRM Excellence Awards

Gartner and 1to1 Media

CRM Excellence Awards



Through this joint awards program, Gartner and 1to1 Media honor leading customer experience organizations and spotlight the standards of excellence among these organizations that have taken a customer-centric approach to improving their business performance. The winners were selected by a panel of judges that consisted of Gartner analysts and the 1to1 Media editorial staff.

"The 2014 winners all shared the common goal of improving the lives of their customers and recognized the significance of looking at their organizations from their customers' perspective," said Penny Gillespie, Research Director at Gartner. As these winners demonstrate, nothing great is ever achieved without talking to the customer."

[Learn more](#) about the Gartner and 1to1Media CRM Excellence Awards.

Customer Analytics

Gold: Hilton

Silver: DirectTV Panamericana

Bronze: T-Mobile

Integrated Marketing

Gold: Syngenta Brasil

Silver: Banco Espirito Santo

Bronze: Isbank

Customer Service

Gold: SanDisk

Silver: City of Buffalo

Bronze: MedicAlert Foundation

Sales Force Effectiveness

Gold: HDFC Bank

Silver: Akbank

Innovation (Emerging Technologies)

Gold: Portugal Telecom



The identification of a Gartner and 1to1 Media Award winner or finalist is not an endorsement by Gartner or 1to1 Media of any vendor, product or service.



Heidi Miller @heidimiller · May 19

Stop looking at social as something separate; work across business units to apply social as a discipline - @JSussin #GartnerCRM



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Your customer has gone digital. Now what?

Deliver digital-age customer experiences that set you apart from your competition and build customer loyalty and advocacy

Key Benefits

Craft your digital CRM vision and strategy

Differentiate through customer experience

Engage customers across channels

Deploy new sales and marketing tools

Deepen your understanding of the customer

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