

Gartner Customer Strategies & Technologies Summit 2014

28 - 29 April 2014 | London, UK | gartner.com/eu/crm

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

Trip Report

The annual Gartner Customer Strategies & Technologies Summit was held on 28-29 April, 2014, at the Park Plaza Westminster Bridge Hotel in London. This report summarizes and provides highlights from the event.

Overview

The impact of moving to a “digital world” where information is everywhere and customers can engage whenever and wherever they like should not be underestimated. A new strategy is needed. We hope that the 2014 Customer Strategies and Technologies Summit has enabled you to unravel this complexity and helped to spark some new ideas that will help your organization to grow through digital participation and elevated customer engagement.



Park Plaza Westminster Bridge



Jim Davies speaking at Gartner Customer Strategies & Technologies Summit 2014

Save The Date

The 2015 Customer Strategies & Technologies Summit will be held on June 10-11, 2015 in the Lancaster London Hotel.

We look forward to seeing you there!

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Key take-aways

We'd like to leave you with these key pieces of advice from the event.

- 1** Develop a balanced, eight-building-block approach to CRM and stop trying to do CRM without any organizational changes.
- 2** Lead the digital charge. Start setting the digital business agenda and increase the sense of urgency. Educate your colleagues. Ask for forgiveness — not permission.
- 3** Look for mobile innovation, great opportunities are still waiting to be discovered. Find partners or skills to develop innovative user experiences. Define a measurable business goal, only then will you know if you succeed.
- 4** Social marketing's hype is under increasing scrutiny. The most advanced organizations establish a correlation between social marketing activities and business outcomes, and use that knowledge to plan and prioritize marketing efforts.
- 5** Ensure that your customer analytics strategy is the appropriate balance of measurement, process improvement, and business innovation. Expand analytic information to the people who actually come in contact with the customer.
- 6** Maintenance is a critical revenue stream for CRM vendors and highly protected. Do not overbuy licenses, as the maintenance will be very difficult to reduce. Consider buying individual licenses, and forsaking some discounts if you have large shelfware concerns.
- 7** Do not expect technology by itself to solve your revenue and customer acquisition challenges. Encourage and invest in organizational alignment between sales, marketing, and IT to agree on business objectives.
- 8** Seek out your BPM colleagues. Discuss where BPM and CRM can partner to achieve improved customer experience and profit. They will want to partner with you.
- 9** Organizations creating their MDM strategies should view master data as a key organizational asset, and should think in terms of the MDM lifecycle. They also should scope out the MDM strategy in terms of the data domains and use cases relevant to their organization and their industry sector. Finally, they need to decide where to start their MDM journey.
- 10** Gauge the importance of customer experience to your organization and your senior executives' real commitment before expending resources. Go beyond customer process re-engineering to customer process reinvention and use the customer life cycle as a framework to hold it together.

“ The event has re-assured me that my company is headed in the right direction but also provided inspiration on how we can accelerate and build on the current direction of travel. ”

Rosa Legassick,
Portfolio Manager,
Severn Trent Water

“ We are a team from the same company and the conference raises topics that we all from CMO to CEO/CIO will have to discuss ”

Mette Bossen,
Marketing Manager,
ASE

Gartner Keynote Sessions

The Digital Industrial Revolution, Your Customers and You

Mark Raskino

We opened the summit with a keynote presentation that examined how over the coming decade, every industry will be digitally remastered. What happened to Kodak and Blockbuster will happen in your industry too. In this digital industrial revolution, superficial pseudo-loyalty marketing will do more harm than good and a deep understanding of unmet customer needs will be the key to success.

Mark's guidelines for the new customer centric digital business world:

- There is no big packaged solution - You must invent and compose
- You must prepare to hack hardware
- The default architecture will be cloud and mobile
- Customers will give you their data... But only if you give them value and trust
- It's all about creativity with data. New kinds of information are the center of design

Keynote: Taming the Digital Dragon: Implications of The 2014 CIO Agenda For Customer Strategies

Dave Aron

In this keynote, Dave Aron continued the discussion about digitalization and the implications for Customer strategies. Using Gartner's 2014 CIO survey as a basis, this session examined how businesses should evolve their approach to information and technology in order to win. Dave's recommendations were:

- Digital opportunities and threats cut across traditional functional boundaries, and require increased collaboration
- Play your part in building bimodal capability
- Act on talent challenges — don't just admire the problem
- Invest in influencing and educating the senior leadership team



Mark Raskino



Dave Aron



Top 5 Best Rated Track Sessions

Best Practices for Negotiating with Microsoft, Oracle, Salesforce.com and SAP

Alexa Bona, Gartner

Four companies dominate the world of IT CRM software, and the challenges of negotiating pricing and contracts with them are formidable. In this presentation, Alexa Bona addressed the challenges of negotiating with the big four and advised on how to orchestrate a successful contract. Alexa's advice was:

- Include functional software definitions and robust repackaging protections.
- Negotiate in the initial contract that incremental units of that software can be purchased according to the same defined metric for a period of at least three to five years.
- Maintenance is a critical revenue stream for these vendors and highly protected. Do not overbuy licenses, as the maintenance will be very difficult to reduce.
- Consider buying individual licenses, and forsaking some discounts if you have large shelfware concerns.
- Vendors are doing more audits — ensure you have contractual audit protections and audit management processes in place.

Exploring the Chief Digital Officer Role

Dave Aron, Gartner

This presentation used the results of Gartner's CIO survey, case studies and Gartner insight to clarify the nature and trajectory of the Chief Digital Officer role. Key takeaways were:

- Ensure there is digital leadership at the C-level in your business.
- Understand how that relates to your role — scope, integration, touchpoints.
- Push for the right CDO, in terms of background, scope, and resources.
- Work with the CDO to make them successful, which will in turn make the business successful.

From Out to In: Customer Process Redesign

Ed Thompson, Gartner

Customer facing processes are rarely designed for the benefit of customers, they were built by and for the organization operating them. This presentation examined how organizations are redesigning customer journeys, touchpoints and moments of truth to improve the customer experience. Ed Thompson's recommendations were:

- Use the customer life cycle to hang all your other work on — use it as the big picture overview.
- Decide how bold your organization is willing to be: If the politics is tough and it's risk averse, then start with customer process improvement, it's less radical but it has value that should not be overlooked.

- Go beyond customer process improvement to customer process reinvention to radically shake-up the customer experience and differentiate.
- Accept your likely future customers' demands and prepare for them by altering recruitment, building CX process design skills as a competency and deciding on your differentiating CX process.

Customer Experience Scenario: The Magnificent Seven

Ed Thompson, Gartner

The customer experience (CX) is one of the few differentiators that is hard to imitate. Increasing numbers of executives see it as a critical competitive battleground. This session examined some of the most common issues that organizations are facing in relation to their CX strategies. Key advice from this session was:

- Gauge the importance of customer experience to your organization and your senior executives' real commitment before expending resources.
- Find out what programs, projects and initiatives are already in place and who's running them.
- Go beyond customer process re-engineering to customer process reinvention and use the customer life cycle as a framework to hold it together.
- Fix customer frustrations and get the basics right by stealing ideas from others before innovating.
- Take a business model view of digital innovation for the greatest impact when reinventing processes.

A Clear Vision and Strategy: The Key to CRM Success

Scott Nelson, Gartner

In this new era of digitalization of the customer relationship, organizations must deal with the difficult issues of vision and strategy to win. This presentation examined what a CRM vision and strategy is, and why it is critical to CRM success? Scott Nelson's advice was:

- Stop thinking in silos only.
- Avoid having a strategy that just happens.
- Identify a visionary to drive a CRM vision.
- Establish key metrics and KPIs for being customer centric.
- Build a day in the life of a customer story to drive your vision.
- Evolve to become customer centric, addressing organizational issues.
- Expand your definition of CRM.

Top 10 Most-Attended Sessions

The most popular track presentations during the event were:

- 1 Act as One: How to Deliver an Outstanding Multichannel Customer Experience
- 2 From Out to In: Customer Process Redesign
- 3 Case Study: John Lewis: Our Journey to Omni-Channel Customer Relationships
- 4 Personalize the Customer Experience to Boost Satisfaction, Loyalty, Advocacy and Profit
- 5 A Clear Vision and Strategy: The Key to CRM Success
- 6 Customer Experience Scenario: The Magnificent Seven
- 7 Better than Humans: How Customer Self Service can Revolutionize Your Business
- 8 Change Management: The Hidden Key to CRM
- 9 Social for CRM: The Next Five Years
- 10 Case Study: Thomson Reuters: Aligning Sales, Marketing and Automation to Drive Revenue Growth

Missed a session?

Have no fear. Your ticket includes keynotes and track sessions — not just those you see live! Gartner Events On Demand provides streaming access of recorded presentations to all paid attendees for one year. Watch your favorites again and see those you missed from any Web-connected device. Visit gartnereventsondemand.com.

“ A good mix of tactical and strategic tips to help in the challenging journey of omni-channel marketing in the era of digitalization.

Martin Gallagher,
Department Manager
Sales & Service,
Swedbank



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Attendee Snapshot

Who participated in the 2014 conference?

Top 5 job titles

1. Management
2. CLevel
3. VP
4. Director
5. Architect

Top 5 job roles

1. Applications
2. Enterprise Architecture
3. Program & Portfolio Management
4. Marketing
5. Consultant

Top 5 industry sectors

1. Technology and Telecom
1. Banking, Finance & Insurance
2. Manufacturing
3. Services
4. Government



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“Gartner conference is a great opportunity for being updated on new CRM technology and process.”

Sonia Hernando,
Marketing & CRM manager,
Toyota Financial Services



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“A great opportunity to get a vendor-independent overview of the market and important developments and to meet peers in industry.”

Remco van Otterdijk,
Business Architect,
Rabobank

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Post-event resources

Customizable post-event worksheet

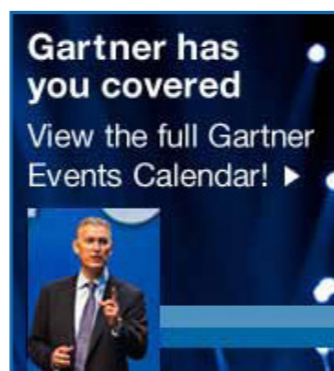
Take a moment to complete your own post-event trip report, a valuable resource for future reference and a great way to share with colleagues what you learned. [Click here](#) to access the trip report worksheet.

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.

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Explore. Search. Listen. Learn.



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Hot topics:

- CRM Strategy
- Single View and Customer Analytics
- Social and Mobile CRM
- Customer Experience Management