

## Gartner Customer 360 Summit 2011

March 30 – April 1
JW Marriott at L.A. Live • Los Angeles, CA gartner.com/us/crm

CRM Strategies and Technologies to Understand, Grow and Manage Customer Experiences

#### 2011 Organizational Opportunities

Increasing sales revenue

Customer acquisition

Customer satisfaction

Organizational change management

Customer data and information



Within the next five years, customer-centric organizations will gain tremendous advantages through customer experience strategies, marketing integration, social media and leveraging customer data and information.

#### Building more profitable customer relationships

Tapping the full potential of today's customer-empowered marketplace requires a complete view of the customer across the organization and across every touchpoint in every medium. Understanding what customers want, need and expect—and having the right people, processes, cultures and technologies in place to respond in real time—will be critical to how successful your organization can be.

By 2020, customers will manage 85% of their relationship with the enterprise without interacting with a human.

Gartner Predicts

#### Driving business in a customer-driven world

The **Gartner Customer 360 Summit** delivers complete coverage of the new strategies and technologies that are enabling organizations to better understand and engage their customers, build loyalty and grow the business. Learn how to:

- Make the customer the center of your business and IT strategy.
- Develop a customer-centric culture that lets you listen to your customers, learn from them and change to meet their needs better.
- Understand the potential of building your business around customers.

## Explore the full range of CRM possibilities

The year's single most important presentation of Gartner research and insight on CRM, the Gartner Customer 360 Summit brings together senior business and IT leaders to focus on creating a strategic, unifying vision for customer engagement and experience management.

## **New for 2011**

- NEW! Marketing Strategies and Technologies Program
- Expanded coverage on effective digital and social media strategies that deliver business results
- C360 Workshop Series
- New case studies that deliver real-life insights
- C360 Power Networking Forum
- Gartner & 1to1 Media CRM Excellence Awards
- Colocated with Gartner Portals, Content & Collaboration Summit

## Who should attend

Senior business and IT leaders responsible for understanding, growing and engaging customers:

- Chief customer officers
- Chief marketing officers
- Chief information officers
- Marketing and sales leaders
- Customer experience and service executives
- Web and social media strategists
- Managers of customer data and analytics

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## Agenda Programs



Don Tapscott
Author,
"MacroWikinomics:
Rebooting Business
and the World,"
Chairman, nGenera
Insight, and
Adjunct Professor
of Management,
University of Toronto

## **Guest keynotes**Rebooting Business and the World

The global economic crisis of 2009 was a wake-up call. Economic and social pillars of the Industrial Age have come to the end of their life cycle and are being rebuilt around a new collaborative model. The advent of new media and a new economy, generation and age of networked intelligence will require dramatic change and lead to breakthroughs in performance, customer engagement and marketing. Don Tapscott, arguably the world's leading thinker on new technologies and media, will share insights from his new book, "Macrowikinomics," including how social media and collaboration are transforming the way firms perform and compete, from innovation to business analytics, knowledge management and the customer experience.



Bernd Schmitt, Ph.D. Author and Robert D. Calkins Professor of International Business at Columbia Business School

#### **Experience Marketing**

The customer experience has emerged as a key differentiator for today's marketers. Using numerous case examples, Bernd Schmitt will provide the key concepts and tools of experience marketing and customer experience management. He will show how a great experience contributes to customer lifetime value and how important technology and people are for providing great service, attractive customer interfaces and innovative solutions.



Val Sribar Group Vice President, Gartner Research

## Gartner keynotes Matching the Pace of Your Customers

Your customers expect you to change at their pace. Your organization would prefer to set the pace of change. Competitors, regulators, social media, mobile technologies and any number of other factors also drive change. The key to being successful at both organizational change and keeping pace with customers expectations is being able to recognize the different paces of change and use a pace-layered approach to designing your processes, information, systems and behaviors to deal with different rates of change.

#### Gartner & 1to1 Media CRM Excellence Awards

Join Gartner and 1to1 Media as we celebrate our 2011 CRM Excellence Awards winners. See page 11 for more details.

#### What to Do on Monday?

After two-and-a-half days of listening to and exchanging your opportunities and challenges with Gartner analysts, sponsoring solution providers and fellow conference peers, you may still be wondering how you're going to apply what you've learned to your business. In this interactive session, Gartner analysts share best practices to consider upon returning to the office on Monday.

#### Two comprehensive agenda programs in 2011

The Gartner Customer 360 Summit 2011 includes two agenda programs across five in-depth content tracks, each packed with new research, case studies and more.

#### **Agenda tracks**

#### Customer 360 Main Program:

#### Growth Through Strategic Vision

Serving the customer is most effective when individual projects are linked to an overarching strategy. This track will explore how to grow profitable customer relationships by placing the customer at the center of your business and IT strategies, processes, and organizational culture.

#### **Understand Your Customer**

Enterprise customer data is increasing at an exponential rate. This track will examine the dynamics of capturing, organizing, analyzing and acting upon this data, as well as the key challenges and rewards.

#### **Customer Experience Management**

Customer service excellence has proven to be the only defensible long-term business strategy. This track will uncover the five top obstacles to success, examine the key technologies for customer service organizations and look at the people and skills issues faced by leaders focused on customer strategy.

#### **NEW! Marketing Strategies and Technologies Program:**

#### Creating an Integrated Marketing Organization

Integrated marketing enables marketing organizations to improve the customer experience, drive revenue, build stronger brands and manage costs. This track will showcase important points of marketing integration, including processes, campaigns and channels, planning, and measurement across industries.

#### Marketing in a Social World

Developing effective digital and social marketing strategies that deliver business results is critical to move beyond the hype. This track will provide the latest strategic insight and practical advice on digital marketing and show how to take advantage of social CRM to acquire new customers and drive loyalty among existing ones.

## Summit Highlights

## Benefits of Attending

## C360 Power Networking Forum

Gartner

Join us Tuesday evening for a special preconference Power Networking Forum, where you'll get to meet your peers through facilitated, structured and fun networking activities before the event begins.



## Agenda navigation

Choose online from a variety of suggested agendas:

- Business and IT
- Maturity level
- Tactical and strategic

Visit gartner.com/us/crm.

## Maximize your Customer 360 Summit experience

#### 50-plus Gartner analyst sessions:

21 Gartner analysts will be on-site to personally present their latest research with tactical and strategic advice and Q&A.

#### Visionary keynotes:

Engage with today's thought leaders and be inspired by big ideas that are sure to generate new insight you can leverage both professionally and personally.

#### Case studies, best practices and solutions:

Leading solution providers and customer practitioners share best practices, strategies and offerings.

#### **Networking opportunities:**

Network on-site with attendees, analysts and solution providers: vertical industry and hot-topic networking breakfasts, roundtables, receptions and a special preconference Power Networking Forum.

#### **Solution Provider Showcase:**

Meet with today's leading solution providers under one roof and get the latest information and demonstrations on new products and services.

## What you can do with what you learn

- Make the customer the center of your business and IT strategy, processes and culture of the organization.
- Create an integrated strategic plan to unite the efforts of sales, marketing and customer service.
- Reach more customers and prospects using new digital marketing capabilities and social media.
- Develop effective digital and social marketing strategies that deliver business results.
- Use social, Web and predictive analytics to understand customer needs and improve the customer experience.
- Gain a better understanding of customers by improving customer data quality and integration and moving toward a single, coherent view of customer interactions.
- Create a customer-centric strategy for your enterprise.
- Communicate CRM business value and justification for the investment.
- Build a world-class e-commerce environment.
- Harness the potential of social media to radically change customer engagement.
- Align marketing and sales for effective lead management.

## Focus **on**

#### CRM strategy:

- CRM vision and strategy
- CRM change management
- Social media strategies
- Sales technologies

#### Customer analytics:

- Social, Web and predictive analytics
- Business intelligence and data quality
- Mining social networks

#### Customer experience:

- Self service
- Feedback managemen
- Service metrics/reporting
- Social networking and media

#### Marketing:

- Marketing resource management
- Performance
   measurement
- Mobile CRM
- Lead management
- Campaign management
- Social marketing, tools and techniques



This has been a very insightful experience. I will be able to report back to my employer all the valuable information I have learned.

## Meet the Analysts

What sets us apart? For over 25 years, Gartner analysts have been the trusted advisors to many of the world's largest and most demanding organizations. Gartner analysts continually draw from the real-life challenges and solutions experienced by 60,000 clients worldwide.

Our entire team of CRM analysts will be on-site, ready for your questions. For your convenience, we've identified them by focus area. In addition to conference sessions, you'll have plenty of opportunities to interact with them in a variety of stimulating settings, including open and interactive presentations and private one-on-one sessions.



Gene Alvarez Vice President

Focus areas: B2B and B2C e-commerce; e-commerce context-aware user experience and mobile commerce; Web customer experience management



Tiffani Bova Vice President

Focus areas: Indirect sales strategies and channel program development; channel marketing and partner relationship management



Kimberly Collins Managing Vice President

Focus areas: Integrated marketing management; marketing resource management; marketing performance management



**Johan Jacobs**Director

Focus areas: Web self service; Web customer service; co-browse; ERMS; virtual assistants; knowledge management; Web chat; multichannel



Michael Maoz Vice President and Distinguished Analyst

Focus areas: CRM/customer service strategies; multichannel applications; SaaS on-demand applications; social networking; strategies; e-customer; mobile CRM



Scott Nelson Managing Vice President

Focus areas: CRM strategy; CRM visioning; social media strategy and CRM; CRM and broader application strategy



Jim Davies Director

Focus areas: Customer service; workforce optimization; enterprise feedback management; customer experience management, voice of the customer



Alexander Drobik Managing Vice President

Focus areas: Evolution of business applications; e-business and e-commerce trends; social media strategy; emerging business models



Michael Dunne Vice President

Focus areas: Sales automation; sales operations; sales and marketing alignment; social selling; sales analytics; price optimization; CPQ processes



John Radcliffe Vice President

Focus areas: Single view of customer; customer data integration; master data management; data quality



Carol Rozwell
Vice President and
Distinguished Analyst

Focus areas: Social media strategy and impact on business models; social networks; collaboration; organizational change



Adam Sarner Director

Focus areas: Marketing automation; digital marketing; multichannel campaign management; lead management; Social CRM



Christopher Fletcher Director

Focus areas: CRM; e-commerce; lead management; payment service providers; partner relationship management; social CRM



Andrew Frank Vice President

Focus areas: Advertising; metrics; social media marketing; targeting and privacy; emerging channels; demand- and supply-side platforms



Bill Gassman Director

Focus areas: Web analytics; social media metrics; business intelligence; cross-channel analysis; Web A/B testing



**Val Sribar** Group Vice President

Focus areas: Pace-layered application strategy; application portfolio management; Pattern-Based Strategy™; application governance and organizational issues



**Ed Thompson**Vice President and
Distinguished Analyst

Focus areas: Customer experience management; CRM strategy and implementation; CRM vendors; feedback management



Ray Valdes Vice President

Focus areas: Web and user experience design; social media strategy and implementation; portal technology; mobile application development



and innovation

Focus areas: Collaboration

Kimberly Harris-Ferrante Vice President and Distinguished Analyst



Matthew Goldman Vice President

Focus areas: Consulting, system integration and customer analytics services



Gareth Herschel Director

Focus areas: Customer segmentation; predictive analytics; text mining; real-time recommendations; CRM metrics; performance management

#### Gartner analyst one-on-ones

Meet face-to-face with your choice of Gartner analysts to consult about your opportunities and/or your challenges. Get the solutions to your problems or realize new ideas for your opportunity.

These sessions fill up quickly-reserve your meeting in advance using Agenda Builder.

## Marketing Strategies and Technologies Program

New! Two tracks that bring you to the intersection between the business of marketing and the latest technology developments in the marketplace

#### Helping CMOs deliver more ROMI

Our new Marketing Strategies and Technologies Program is designed to help CMOs and other senior marketing leaders better leverage the latest technology developments to deliver more effective marketing, more business value and greater ROMI. The first of two tracks showcases important points of marketing integration, including processes, campaigns and channels, planning, and measurement across industries. The second explores marketing in a social world, offering practical advice on the best approaches to digital marketing and showing how to take advantage of social CRM to acquire new customers, grow existing ones and drive customer loyalty.

#### Understand today's new marketing technologies

The rise of digital marketing, social media and mobile, and the critical role marketing plays in returning the company to growth, as well as continued pressures for accountability and measurement, are making marketing management more complex than ever. Integrated marketing is enabling marketing organizations to improve the customer experience, drive revenue, build stronger brands and manage costs. Meanwhile, effective digital and social marketing strategies can deliver business growth, customer loyalty and greater brand resilience.

By 2020, marketing to virtual personas will overtake B2C spending on known customers. Gartner Predicts



#### If you're a senior marketing or business leader...

Join us for a full two-and-a-half days of strategies and tactics to help you use today's marketing innovations for real business value, including how to:

- Drive revenue growth while managing costs effectively.
- Manage marketing performance and strategic planning.
- Improve measurement, analysis and optimization.
- Get value out of social and mobile marketing initiatives.
- Integrate new media initiatives with traditional marketing efforts.

#### **Gartner & 1to1 Media CRM Excellence Awards**





Celebrate organizations that have achieved dramatic customer experience impact with their CRM strategies and initiatives. Hear the successes, challenges and insight from winners in the following categories:

Customer Analytics, Customer Experience, Enterprise Efficiency, Integrated Marketing and Social Engagement. Hear directly from the award winners and gain the best practices to move your own customer initiatives forward.

## Why Gartner?

This was my first Gartner conference and it was fantastic. Great mix of vendors, customer success stories and variety of content.

Gartner produces the world's leading technology conferences for senior IT and business leaders. Gartner events equip you with the knowledge, insight and trusted advice you need to create the most effective technology strategy and become more successful in your role.

#### NEW! Mix-and-match sessions from two comprehensive agenda programs

	Customer 360 Main Program				NEW! Marketing Strategies and Technologies Program	
	Track A	Growth Through Strategic Vision	Track B Understand Your Customer	Customer Track C Experience Management	Creating an <b>Track D</b> Integrated Marketing  Organization	Track E Marketing In Social World
	March 29 (Preregistration	reconference)				
4:30 p.m.	C360 Power Netw	orking Forum				
ednesd	ay, March 30	)				
	Registration					
8:00 a.m.	. Networking Breakfast: Meet the Gartner Analysts					
8:00 a.m.	n. Fast Forward: CRM Solutions in 60 Seconds or Less					
9:00 a.m.	K1. Gartner Open	ing Keynote				
			omics: Rebooting Business and the World"			
	Together to Genera	nd Strategy: Putting the CRM Pieces ate Success Scott D. Nelson	B1. Planning a Customer Analytics Strategy Gareth Herschel	C1. The Customer Experience Management Scenario Ed Thompson	D1. Integrating Marketing Processes to Drive ROMI Kimberly Collins	E1. Mobile CRM: Marketing and Sales Gene Alvarez
•	Michael Dunne	vation Wave for Modernizing Sales	<b>B2.</b> Thinking-as-a-Service: Using Managed Analytics to Fuel Customer Strategies <i>Matt Goldman</i>	<b>C2.</b> Web Customer Service Applications and Technologies <i>Johan Jacobs</i>	<b>D2.</b> Optimizing the Media Mix in Today's Fragmented World Andrew Frank	<b>E2.</b> Case Study: How to Use Social Cl to Drive Additional Business Value
		nd Solution Showcase Reception  er Trends Impact CRM Technologies and	B3. Predictive Analytics: Now More Than Ever	C3. Customer Service Harnesses the Potential	D3. Flying in Formation: How to Align Marketing,	E3. Social CRM: The Next Generation
2:50 p.m.	the Vendor Landso		B3. Predictive Analytics: Now More Than Ever Bill Gassman and John Radcliffe	of "Social" to Radically Change Customer Engagement Michael Maoz	Sales and Indirect Channels Chris Fletcher	Customer Innovation Adam Samer
2:50 p.m.	Workshop #1: Gr	Workshop #1: Great Customer Experience Secrets			Workshop #2: Engaging With Your Customers Through Social Channels: Tips for Success Adam Samer	
3:00 p.m.	Solution Provider Sessions Solution Provider Sessions					
		<u> </u>	ners Val Sribar, Group Vice President, Gartner Research			
5:25 p.m.	Solution Showcas	e Reception				
ursdav.	, March 31					
	Registration					
7:15 a.m.	Networking Breakt	fast: Meet the Gartner Analysts				
8:10 a.m.	A4. CRM Change Process and Chan	Management: The Intersection of People ge Chris Fletcher	, B4. How Marketing Benefits From Business Intelligence an Data Quality Skills Bill Gassman	d C4. Best Practices and Technologies for a World- Class Customer Service Contact Center Michael Maoz	<b>D4.</b> MRM: Integrating Operational Processes via Marketing Resource Management <i>Kimberly Collins</i>	<b>E4.</b> How to Develop a Rational and Realistic Social Strategy Carol Rozwe
9:30 a.m.	K4. Keynote: Gartner & 1 to 1 Media CRM Excellence Awards: Customer Experience, Enterprise Efficiency, Customer Analytics, Integrated Marketing and Social Engagement					
10:35 a.m.	m. Workshop #3: Change Management: Creating a Customer-Centric Culture  Workshop #4: Tips for Turning Vague Cross-Channel Leads Into \$\$ Chris Flee					el Leads Into \$\$ Chris Fletcher
	n. Solution Provider Sessions					
12:05 p.m.	A5. Case Study: H Organization	ow to Create a Customer-Centric	<b>B5.</b> Case Study: Using Customer Analytics to Build Stronger Customer Relationships	C5. Case Study: Can the Service Organization Operate 100% in the Cloud?	<b>D5. Gartner Panel:</b> How to Integrate Social Marketing Into Your Marketing Strategy Kimberly Collins, Carol Rozwell, Adam Sarner	<b>E5.</b> End-User Panel: Social/Digital Marketing <i>Andrew Frank</i>
12:35 p.m.	Attendee Meals an	nd Solution Showcase Reception				
2:35 p.m.	. Solution Provider Sessions					
2:35 p.m.	Workshop #5: Customer Experience Metrics—Is Effectiveness a Realistic Goal? Michael Maoz			Workshop #6: Marketing Performance Management: Measuring Results and Calculating RC Kimberly Collins		
3:50 p.m.	<b>A6.</b> The Building B Scott D. Nelson	locks of Social CRM	<b>B6.</b> How Many Single Views of the Customer Can You Afford? <i>John Radcliffe</i>	C6. Voice of the Customer: Listen, Analyze and Act to Improve the Customer Experience  Jim Davies	<b>D6.</b> Insurance Marketing: Blending Direct Marketing With Intermediary-Based Business Models <i>Kimberly Harris-Ferrante</i>	<b>E6.</b> Lead Management in a Digital Wo Chris Fletcher
5:00 p.m.	K5. Guest Keyno	te: Experience Marketing Bernd Schr	nitt, Author, and Robert D. Calkins Professor of Internationa			
6:00 p.m.	Sponsored Hospit	ality Suites				
day, Ap	ril 1					
	Registration					
		fast: Meet the Gartner Analysts				
7:00 a.m.	networking break			C7. Customer Self-Service: Bringing the Processes Together Johan Jacobs	<b>D7.</b> Integrating Channel Partners in Marketing and Sales Initiatives <i>Tiffani Bova</i>	E7/B7. Desperately Seeking Insight? Mining Value From Social Media!
7:00 a.m. 7:00 a.m.		es: Emerging Marketing, Sales and Service h <i>Michael Maoz</i>	Social Media! Bill Gassman and Carol Rozwell			
7:00 a.m. 7:00 a.m. 8:00 a.m.	A7. Innovation Live Processes to Wato				Workshop #8: Mastering Your Customer Data and O John Radcliffe	Bill Gassman and Carol Rozwell
7:00 a.m. 7:00 a.m. 8:00 a.m. 8:00 a.m.	A7. Innovation Live Processes to Wato	h Michael Maoz Istomer Analytics for Financial Services ar				Bill Gassman and Carol Rozwell

#### Build your own customized agenda online

Use our convenient Agenda Builder to custom-create your own summit curriculum. Visit gartner. com/us/crm.

#### Solution Showcase

## Registration

#### Today's leading CRM solutions, all in one place

The solution showcase is the place to connect with today's leading providers and top innovators in the CRM space. Access relevant research, streamline the vetting process and walk away with a shortlist you can act on immediately.

#### Premier Sponsors

as of December 20, 2010



Autonomy Corporation, a global leader in infrastructure software for the enterprise, spearheads the Meaning Based Computing movement. Autonomy's technology allows computers to harness the full richness of human information, forming a conceptual and contextual understanding of all electronic data, including text, email, web pages, voice, or video. Autonomy's multichannel customer interaction analytics solution consolidates all customer interactions from contact center, website, storefront and social media, to identify patterns in customer behavior and improve the customer experience.



Jive Software is the largest and fastest growing independent Social Business Software company in the world. Jive's vision is to change the way work gets done, by extending the innovation from consumer social to the enterprise. The company was founded in 2001, with its headquarters in Palo Alto, CA. Learn more at iivesoftware.com.

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IBM Business Analytics software delivers complete, consistent and accurate information that decisionmakers trust to improve business performance. A comprehensive portfolio of business intelligence, advanced analytics, financial performance and strategy management, and analytic applications gives you clear, immediate and actionable insights into current performance and the ability to predict future outcomes. For more information, visit ibm.com.



Microsoft Dynamics CRM offers businesses of all sizes the ability to create and grow profitable customer relationships via a complete sales, service and marketing suite. Based on the familiar Microsoft Dynamics CRM Microsoft Office Outlook user experience, Microsoft Dynamics CRM provides the easiest and most natural way to deliver powerful CRM capabilities from the applications that employees use every day.



Oracle (NASDAQ: ORCL) is the world's most complete, open, and integrated business software and hardware systems company. A leader in CRM with over 5,000 CRM customers, and more than 4.6 Million CRM and 125 million self service users, customers rely on Oracle's On Demand and On Premise CRM solutions.



Pegasystems is the recognized industry leader in business process management (BPM) and a leading provider of customer relationship management (CRM) solutions. We help some of the world's largest companies achieve new levels of agility, enhance customer loyalty, generate new business and improve productivity. To learn more visit pega.com.



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#### Dan Anibal

(Companies A - N) Account Manager. +1 203 455 0570 dan.anibal@gartner.com

#### **Brian Hobbs**

(Companies M - Z) Account Manager. +1 203 316 3042 brian.hobbs@gartner.com

### 3 easy ways to register

Web: gartner.com/us/crm

E-mail: us.registration@eventreg.com

Phone: 1 866 405 2511

Conference registration fee includes conference attendance, documentation and planned functions.

Standard price: \$2,150 Public sector price: \$1,750

#### **Early-bird** price savings: \$1,850

Save \$300. Applies if credit card payment is received by February 4.

#### Bring your team, save and make a bigger impact

Attending a Gartner summit as a team lets you participate in more sessions to maximize learning, impact and value. Team benefits include:

- Team meeting with a Gartner analyst (end users only)
- Optional meeting(s) with select vendor organizations
- 10+ free audio sessions from Gartner Events on Demand
- Complimentary team lounge and meeting space\*
- Concierge service pre-event and on-site

your Gartner account manager.

Team discounts include:

- 4 for the price of 3
- 12 for the price of 8



#### New! Colocated with Gartner Portals, Content & Collaboration Summit. March 28 - 30

With two Gartner summits happening in Los Angeles, you'll experience a full week of insight for success around your hottest CRM and PCC related topics. Visit gartner.com/us/pcc for full conference details.

#### Gartner event tickets

We accept one Gartner conference ticket as full payment. If you are a client with questions about tickets, please contact your sales representative.

Interested in becoming a Gartner client?

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#### Special Gartner hotel room rate: \$229 per night

A limited block of rooms has been reserved at the JW Marriott at L.A. Live with our special rate of \$229. Since these rooms can only be held until February 28, we recommend you contact the hotel now. Be sure to indicate that you are attending the Gartner summit when you make your reservation.

JW Marriott at L.A Live 900 West Olympic Boulevard Los Angeles, California 90015

Phone: +1 213 765 8600 Web: lalivemarriott.com



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# Early-bird savings

Register by February 4 and save \$300!

# 3 easy ways to register

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56 Top Gallant Road PO Box 10212 Stamford, CT 06904-2212

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# SEE INSIDE FOR:

- The lastest agenda details
- New Marketing Strategies and Technologies Program

Priority code: