

Directions 2010, Santa Clara, California ~ CONFERENCE AGENDA ~

Directions 2010

Capitalizing on the Recovery: Building the Foundation for the Intelligent Economy

7:30 am Registration and Breakfast

7:30 – 10:55 am Coffee Chats & Demos

Join analysts, product specialists and peers to discuss business practices and experience demos that will help you realize future growth potential. These informal tables will be hosted throughout the morning for walk-up service.

Going Global: Taking Your Content-Based Marketing to New Levels in New Ways, *Laura Nurzynski, Group Vice President, Go-to-Market and Sales Enablement Services; and Heather Levinson, Vice President, Consulting*

Join IDC Go-to-Market Services and IDC Consulting to discuss best practices in creating global campaigns in various media formats and the use of social networking and social media to reach all audiences, meeting their needs and preferences for consuming information. IDC discusses how these methods help you do your job and how IDC's third-party, objective research can help support you in reaching all audiences: internal and external, such as IT buyers, sales and partner enablement professionals, channel partners and more. Join us to learn about IDC's best-kept secret and how we work with teams such as yours.

Maximize Your Marketing and Sales Effectiveness: New Software Deals Database, *Melita Marks, Vice President, Global Software and Services Product Management*

This discussion will focus on a powerful tool, representing the world's only database of customer software deals, that can be used to identify early stage software spending; drive account development; understand which competitors are gaining traction by segment; identify cross-segment wallet share competition; and better align campaigns and messaging to active purchasing areas.

Pursue IT/BPO Services Deal Renewals and Generate Leads, *Alexander Motsenigos, Program Director, Worldwide Services Contracts Analysis and Trackers*

Learn about a powerful tool, which represents the world's largest database of IT and Business services deals, that can be used for lead generation, account development and deep customer segmentation, contract benchmarking, partner tracking and assessment, and competitor monitoring by industry, geography, and market.

Sales and Marketing Alignment, *Michael Gerard, Program Vice President, Sales Advisory Practice*

The term sales and marketing alignment must no longer be a simple platitude within a company's strategy, lacking real substance needed for execution. Best-in-class technology organizations have established specific initiatives to improve sales and marketing alignment: for example, developing a campaign management role and process, creating and executing a sales enablement strategy, and better aligning corporate marketing, business unit marketing and field marketing with sales organizations. Join us for a discussion about some of these changes that best-in-class sales and marketing organizations have made to improve the productivity of their sales organization and to improve the level of customer interaction and their organization's overall competitiveness.

Selling IT in the Recovering Economy: IDC Business Value Research, *Randy Perry, Vice President, Business Value Consulting; and Eric Hatcher, Senior Research Analyst, Business Value Consulting*

With IT budgets still under close review, and only the most compelling investments receiving approval, it is critical to quantify the value of a new IT investment to the organization. IDC has a proven approach to measuring the business value of IT that is prescriptive and highly quantified. This discussion will illustrate the benefits of our approach with real world examples.

Target Marketing for a Competitive Edge: Custom IDC Market Analysis, Segmentation and Share Measurement, *Meg Dings, Vice President, Services Consulting; and Andrew Ware, Vice President, Software Consulting*

This discussion will be centered on IDC's approach to creating custom market forecasting models for clients. In a period of heightened competition, it is essential to understand your market opportunity and competitor dynamics at a very granular level. IDC analysis helps to uncover opportunities to take share from competitors.

Trackers: The Golden Compass, *Hoang Nguyen, Program Vice President, Worldwide Tracker Program; and Kathy Nagamine, Director, Worldwide Trackers*

A compass always points north, while our Tracker tools guide clients towards the right business opportunities by providing detailed, timely, and accurate quantitative information on the rapidly changing global IT market.

Understanding the Buyer: IDC Custom Primary Research, *Michael Cousins, Vice President, Personal Systems Consulting; and Warren Childs, Consulting Director, Desktop Systems*

IDC conducts many custom primary research projects every year. Consumer and B2B research is growing in importance. This informal discussion will focus on our approaches to qualitative and quantitative primary research.

8:00 – 8:45 am Breakfast Briefings

These early-bird breakouts are open to all. Attendees are welcome to pick up breakfast before proceeding to these sessions.

Adapt or Vanish: The Impact of Cloud Computing on the IT Channel Ecosystem, *Janet Waxman, Vice President, Infrastructure Channels and Alliances*

In the new era of cloud computing and the ramping of other cloud-like IT services including SaaS and Managed Services, the solution provider community must assess the potential impact to their businesses and make the necessary adjustments for continued growth and profitability. In this thought leadership session, Janet Waxman and Chris Ilg will explain the macro effects on the channel of the transition to cloud services, including IDC's prediction as to how quickly we expect to see the effects in the marketplace. Ms. Waxman and Mr. Ilg will also detail what will be the success factors for solution providers in this new era and what the vendor community will need to do to attract and support the channel as it adapts to the "new normal" that is cloud computing.

Opex vs. Capex: How Lingering Capital and Budget Constraints Are Shaping IT Strategies, *Joseph Pucciarelli, Program Director, Technology Financing and Executive Strategies*

For IT organizations worldwide, improving economic circumstances have heightened pressure on virtually every aspect of business operation – from tight capital spending to limited operating expense budgets. Most IT organizations believe that these new, more demanding, operating practices have become the “new normal.” In this presentation, IDC explores strategies and best practices for organizations evaluating, employing or striving to optimize an IT funding and financing strategy.

The Rebirth of IT: Why Tech is Emerging Stronger from the Great Recession, *Stephen Minton, Vice President, Worldwide IT Markets and Strategies*

2009 was a year to forget for the IT industry, as the Great Recession inevitably resulted in significant declines across most tech markets. After the last recession in 2001, the hangover for the IT industry lasted for more than three years. This time around, the industry will recover more quickly. What are the differences between now and then? Where are businesses choosing to invest their IT dollars now, and what can you do to capitalize on these leading growth opportunities? What are the key drivers for tech investment in this post-recession market, and what does this mean for you? Answers to these questions and more will be discussed.

9:00 – 10:25 am **General Sessions**

9:00 – 9:15 am

Welcome and Introduction, *Kirk Campbell, President and Chief Executive Officer*

9:15 – 9:50 am

ICT Outlook: Recovering into a New World, *John Gantz, Chief Research Officer and Senior Vice President*

While the global economy has been going through the worst downturn since World War II, the ICT landscape has been quietly transforming. Cloud computing, Software-as-a-Service, Web 2.0, machine-to-machine computing, a smarter and smarter grid, mobile everything, and a data center revolution that will help us fight global warming, revitalize our cities, and streamline health care delivery. Now, as the industry and its customers recover, the question is... recover into what? How has the landscape changed? How have spending patterns shifted? What new pressures are CIOs facing beyond tight budgets? What should IT vendors do about allocating still-scarce resources? How much can we trust this recovery? In this session IDC Chief Research Officer, John Gantz, will talk about how the collision between the economic crisis and a technology renaissance has permanently changed the ICT market and the industry that supplies it. There will be no "new normal" as we enter the 2010s – only new opportunities and challenges.

9:50 – 10:25 am

Tech Marketing and Sales: The Transformation Accelerates, *Rich Vancil, Vice President, Executive Advisory Group*

Across the industry, inside marketing and sales organizations, major changes are taking place. Marketing organizations are being restructured in a forced-alignment with Sales organizations. Budgets are being stripped-down and re-built to accommodate major shifts in media preference and delivery. And as the tech industry consolidates to a fewer number of "scale" vendors, the very biggest and best vendors are centralizing and investing in powerful, centralized marketing and sales operations centers. Is your company a leader or laggard in this Transformation? How does the "average" company build a successful marketing and sales operation - and do so in times of lean budgets? In this session, IDC will examine the under-lying factors of marketing and sales transformation, and will provide its guidance for strategic and tactical organizational response. Presenter Rich Vancil, VP of IDC's Executive Advisory Group, will include the very latest marketing and sales budgets and investment trends for 2010. In addition, IDC's latest "Customer Experience" research will provide guidance on what really matters: how do our customers want to receive and consume materials and information from the vendor community?

10:25 – 10:55 am **Networking Break, Coffee Chats & Demos, Email Kiosk**

10:25 – 10:55 am **Analyst One-to-One Meetings**

Open to all attendees by appointment. Visit the Analyst Connection Kiosk to schedule your meetings. Visit www.idc.com/directions10 for a list of analysts available for one-to-one meetings.

10:55 am – 12:05 pm General Sessions

10:55 – 11:30 am

Smart Cities: Proving Ground for the Intelligent Economy, *Rick Nicholson, Vice President of Research, IDC Energy Insights*

The intelligent economy will be enabled by the deployment of certain "foundation" technologies that include intelligent devices such as sensors, smart phones and smart meters, pervasive broadband communication networks, and analytic and social media applications. This foundation will drive transformation across all industries. However, this trend will accelerate in smart cities and other intelligent economic clusters where the level of interaction among utility companies, health care providers, retailers, banks, public transportation authorities and their customers is the most intense. For example, a resident in a smart city that wants to get from home to work to shopping and back again, while minimizing either cost or carbon footprint, will interact in real-time with intelligent energy, transportation, retail and banking networks on a daily basis. As such, smart cities will be both the proving ground for the intelligent economy and the leaders in addressing sustainability issues through the use of intelligent technologies. ICT vendors cannot, however, continue to use traditional strategies to address the needs of this market. Vendors must understand the connections and data flows between the various participants in this market to capitalize on this opportunity. This session will explore the government policy, business and technology trends driving smart city initiatives, provide case study examples of smart city initiatives, highlight the ICT opportunities in each industry, and provide guidance on how to pursue these opportunities.

11:30 am – 12:05 pm

The Maturing Cloud: What It Will Take to Win, *Frank Gens, Senior Vice President and Chief Analyst*

For the past three IDC Directions events, we've pointed to the emerging Cloud model as the next transforming paradigm for the IT industry. In the last 12 months, we've seen signs that the cloud model is entering a critical stage – "crossing the chasm" and evolving for mainstream adoption. A flood of established IT and telecom players have jumped into the competition (along with first generation of cloud leaders) and are claiming they're better equipped to serve the mainstream market's needs. The solution developer community is preparing to migrate existing solutions – and develop many new solutions – on cloud platforms, and channel players are evolving to bring these cloud solutions across the "last mile" to customers, particularly SMBs. Deployment models are expanding to include public and private cloud models and many hybrid combinations. Users are exploring what parts of their portfolios are ready to leverage the cloud, and vendors are assessing their opportunities to both deliver cloud services and enable others' delivery of others' cloud services. This session will look at the cloud's evolving opportunity landscape and use IDC's latest research to identify several critical paths to success in this IT industry transformation.

12:05 – 1:30 pm Lunch and Lunch Sessions

Pick up a box lunch before your meeting or session.

12:05 – 12:35 pm Analyst One-to-One Meetings

Open to all attendees by appointment. Visit the Analyst Connection Kiosk to schedule your meetings. Visit www.idc.com/directions10 for a list of analysts available for one-to-one meetings.

12:05 – 1:20 pm Lunch Roundtables

Open to all attendees on a first-come, first-served basis. Note: Numbered roundtables not available in this location have been omitted.

Table 1: 2010 Enterprise Applications, Analytics, Application & Integration Platform Buyers – Who Are They and What Are They Buying? *Maureen Fleming, Research Director, Business Process Management Team and IDC Worldwide Software Deals Database Team*

With more than 10,000 enterprise applications, analytics software, and application development and deployment tools deals aggregated in our Worldwide Software Deals Database, this lunch roundtable identifies the latest purchasing trends that will help software and services providers take advantage of the economic recovery by winning new business in 2010. The session is designed to be interactive, with participants sharing insights.

Table 2: Achieving the Next Generation of Sales Enablement, *Rich Vancil, Vice President, Executive Advisory Group; and Michael Gerard, Program Vice President, Sales Advisory Practice*

The lead analysts of IDC's CMO and Sales Advisory Practices will facilitate an interactive discussion amongst roundtable participants regarding the key success factors to achieving the next generation of sales enablement. IDC's extensive research in marketing and sales has uncovered significant gaps in companies' abilities to optimize sales' productivity and customer interaction; and sales enablement offers us a unique opportunity to close these gaps. IDC will share some of its best practices insight from an organizational structure, process and technology perspective, as well as lead a discussion on what other companies are doing and/or should be doing to optimize the potential of sales enablement.

Table 3: Cloud Security: What Do Customers Want? *Chris Christiansen, Program Vice President, Security Products & Services*

Security is a major impediment to cloud deployments. In this session, Mr. Christiansen will lead a group discussion around customers' issues such as authentication/authorization, data protection, vulnerability assessments, co-managed consoles, and other concerns.

Table 6: Exploring the Evolving Channel Ecosystem, *Janet Waxman, Vice President Infrastructure Channels and Alliances; and Chris Ilg, Research Director, Infrastructure Channels and Alliances*

This session will be about the changing landscape of the channel ecosystem. As new companies emerge and the cloud looms large over the market, IDC believes that the U.S. IT market is really becoming a channels market, where the power of the channel is starting to eclipse that of the suppliers. This session will provide additional insight and thoughts on how best suppliers can prepare for this change.

Table 7: Global Risk Management Current Issue Discussion, *Dana Wiklund, Director Global Risk Management Practice, IDC Financial Insights*

Global issues and implications for Risk Management within Financial Services are dynamic and changing nearly constantly. This roundtable discussion will be an interactive exchange on issues of credit, market and operational risks that have received recent attention. The importance of enterprise risk management and necessary transparency of strategies between solutions providers and end-users will be a topic explored. Additional risk discussions relative to the participants' business models will be welcomed as well.

Table 9: Growth Opportunities in the Consumer Semiconductor Market, *Michael Palma, Senior Research Analyst, Enabling Technologies and Semiconductors; and Ajit Deosthali, Research Manager, Flash Memory, Consumer Devices and Wireless Semiconductors*

This roundtable will focus on the opportunities for semiconductor suppliers and other supply chain participants in the consumer device market. We will examine the opportunities for key categories of semiconductors-processors, connectivity ICs, analog ICs, MCUs, and power solutions in various end-markets. We will also discuss market demand over the next five years, how technologies will evolve, and what features IC suppliers will need to enable or support for system OEMs. We will also review the competitive landscape, as well as the issues driving OEM selection of semiconductor suppliers.

Table 10: Healthcare Reform and IT Transformation, *Scott Lundstrom, Research Vice President, IDC Health Insights*

Healthcare reform will drive broadly based investment across the full spectrum of IT – hardware, software and services. Federal stimulus funding for Health IT in excess of \$20 billion is fueling a transformation in the way IT is used to provide and manage care. Healthcare providers are being challenged to transform healthcare delivery. Increasing demand for quality care is placing stress on every facet of health delivery and provider IT departments are being challenged to implement systems that improve care quality, reduce costs, and foster communication and advancement in clinical best practices.

Table 11: Hot New Media and Social Media Trends, *Karsten Weide, Program Director, Media and Entertainment*

The breakthrough of online video, the surge in mobile Internet usage, the incredible popularity of social media and the struggle to monetize them, and dramatic changes in the online advertising workflow – all prove the new media are as emergent as ever, shaken by powerful new trends and disruptors. Join this lunch roundtable to discuss the latest challenges in today's new media, how to confront them, and how to successfully develop your new media business.

Table 14: Making a Case for Investing in Business Intelligence and Analytics, *Dan Vesset, Vice President Business Analytics Solutions*

IDC research points to growing evidence of the competitive value and ROI of business intelligence and analytics solutions. Application, SaaS, and BPO vendors should consider adding BI and analytics functionality to their solutions to meet the growing demand from end-user organizations. This roundtable will address the latest demand and supply trends as well as highlight the latest IDC end-user research.

Table 15: Mobile Apps: Outlook for Consumer and Enterprise Markets, *Stephen Drake, Program Vice President, Mobility and Telecom; and Scott Ellison, Vice President, Mobile and Wireless*

This roundtable will discuss the current state of and outlook for the consumer and enterprise mobile applications spaces. Major issues that will be discussed will include what is driving the mobile apps opportunity, the interplay between OS platforms and the mobile apps space, opportunities to expand the mobile apps market beyond smart phones to netbooks and feature phones, competitive dynamics among the major apps storefronts and their underlying developer communities, and key consumer and enterprise mobile apps segments to watch over the course of 2010.

Table 16: Mobile Device Technology and Trends, *Will Stofega, Program Manager, Mobile Device Technology and Trends; and Flint Pulskamp, Program Manager, Wireless Semiconductors*

This roundtable will discuss current trends in mobile devices. Topics for discussion will include mobile operating systems, vendor strategies, a deep dive into hardware capabilities and the ongoing relationship between vendor and mobile operator. Also, as mobility becomes the dominant access technology, some discussion will be devoted to examination of air interface standards such as 3G and various 4G technologies, such as LTE, especially as they relate to the mobile device. The goal of the table will be to both educate participants and clarify IDC views on the trends in this high growth market.

Table 17: New Trends and Directions in HPC Technical Computing, *Earl Joseph, Program Vice President, High-Performance Computing; and Jie Wu, Research Manager, Technical Computing*

This discussion will focus on the latest results from IDC's HPC research, including five-year market forecasts. Also discussed will be new trends in emerging countries China and Russia, the changing nature of the largest supercomputers (will we see a \$1 billion supercomputer?), and the HPC User Forums in 2010.

Table 18: Prioritizing Resources in a Challenging Economy with IT Portfolio Management and Focusing on Quality with Testing as a Service, *Melinda Ballou, Program Director, Application Life-Cycle Management and Executive Strategies; and Rona Shuchat, Program Director, Application Outsourcing Services*

Increasingly, G2000 organizations struggle with effective resource allocation across their IT portfolios of people, finances and assets. IDC analysts are collaborating to publish effective analysis in this area across disciplines to help users address this key emerging market (including two MarketScapes for IT Project Portfolio Management). At the same time, as cloud computing explodes as a market opportunity, vendors and users need to understand both the evolving tools and services markets sustaining and supporting Testing as a Service. Join veteran analysts Melinda Ballou and Rona Shuchat as they present their most recent user analysis and Testing Services MarketScape research and discuss opportunities across tools and services markets in this dynamic, rapidly evolving key market.

Table 19: Semiconductors Enabling Convergence in the ICT Markets, *Mario Morales, Program Vice President, Semiconductors and EMS*

This roundtable will discuss current technology adoption trends in the IT and Telecom industries and how semiconductor suppliers are enabling the convergence of systems, networks, and software. Topics for discussion will include key technologies being adopted in next generation mobile devices, consumer electronics, embedded, and automotive. Mr. Morales will also provide our perspective on what these new technologies mean in terms of revenue and volume opportunities for semiconductor suppliers, OEMs, and OS companies as these markets continue to collide.

Table 20: Smart Cities as Drivers of Intelligent Technology Investment, *Rick Nicholson, Vice President, IDC Energy Insights*

Smart cities are emerging as markets where intelligent technologies such as smart devices, communications networks and business analytics are converging to enable the transformation of energy, transportation, banking, retail and health care. Although this is an emerging market opportunity, there are already some examples such as Smart Grid City in Boulder, Colorado, and the Amsterdam Smart City initiative. Join IDC Energy Insights vice president Rick Nicholson to discuss this emerging opportunity.

Table 21: Social Business Transformation, Michael Fauscette, Group Vice President, Software Business Solutions

We are starting to see the signs of a significant business movement in response to the social web that is transforming business behavior both inside and outside the firewall. The change is being driven by several different converging factors including worker demand for web 2.0 tools and customer demand for more social online experiences and interaction, as well as the need for businesses to innovate and scale globally. The economic downturn has intensified this need for new ways of doing business. During this lunch roundtable, participants will be asked to share their own personal experience of how the social web is impacting how they conduct business and will learn how this compares to the larger market trends IDC is observing.

Table 22: Storage and Virtualized Environments – Strategies for Optimizing Deployments, Benjamin Woo, Vice President, Storage Systems

As enterprises move from a data centric to information centric IT environment, optimizing a storage strategy in terms of efficiency, architecture, scalability and reliability becomes critical. This discussion will include strategies for the optimization of these environments as they relate to storage – especially as both individuals and corporations alike increasingly see data and information as digital assets within their organizations.

Table 23: Taking the Show on the Road: Recent Developments in Mobile Entertainment, Susan Kevorkian, Program Director, Mobile Media and Entertainment

This roundtable discussion will focus on current trends in mobile entertainment, recent developments in connected consumer electronics and related services, including integration of 3G connectivity in CE devices, and content and service business model winners and losers.

Table 24: Technology Financing – A Critical Business Enabler, Joseph Pucciarelli, Program Director, Technology Financing and Executive Strategies

As markets continue their recovery from an unprecedented capital crisis, tight capital budgets remain the norm for most companies. As a result, IT providers continue to aggressively integrate financing offers into core Go-To-Market business strategies. Whether equipment, software or services, IT leasing and financing programs are an important issue on which IDC clients are seeking advice and counsel. Join IDC's veteran technology financing analysts to discuss the latest market developments and requirements.

Table 25: Telco Survival Strategies in the Cloud Era, Courtney Munroe, Group Vice President, Worldwide Telecommunications; and Melanie Posey, Research Director, Telecom Markets

The convergence of the network infrastructure, end-user expectations for the seamless mashup of wireless and wireline applications, and emerging cloud-based services are all rapidly transforming the telecom landscape. These trends have broad implications for the telecommunications industry. The legacy models for revenue generation, investment and transformation are evolving. Telcos worldwide face a massive shift in consumption patterns in a relatively short timeframe, while facing competition from a myriad of new sources. This roundtable discussion will focus on how telecom providers can remain relevant in light of evolving trends and leverage new opportunities for profitable growth.

Table 26: Telecommunications Growth Opportunities in the Smart Grid, Marcus Torchia, Research Manager, IDC Energy Insights

Investment in the smart grid – spurred by stimulus dollars, regulatory mandates, and venture capital investment – is one of the hottest topics in the utility industry. A recent IDC Energy Insights study indicates that this market will grow to \$17.5 billion by 2013 in North America alone. This growth presents unique opportunities for telecommunications hardware, software and services providers. Join IDC Energy Insights analyst Marcus Torchia to discuss recent market developments, case studies and future predictions.

Table 29: The Future of Cloud Services in Banking, David Potterton, Vice President of Global Research, IDC Financial Insights; and Jeanne Capachin, Research Vice President, Global Banking and Insurance Practices, IDC Financial Insights

This roundtable discussion will focus on cloud computing within banking. The analysts will discuss current trends as well as future directions for the industry. We will also look at what applications are making the move to cloud and which are not.

Table 30: Transforming the Workforce, *Lisa Rowan, Program Director, HR, Learning, and Talent Strategies; and Cushing Anderson, Vice President, Project Based Services Research*

How do we change people and their roles in the workplace to be able to fulfill the goal of the intelligent economy, a major opportunity for services? The changing business environment presents opportunities for growth, but is inhibited by a pool of high-performing talent that is either shrinking, inaccessible or under-utilized. After layoffs and right-sizing, many organizations have a shortage of quality employees in critical roles to take advantage of new opportunities. The ability to anticipate talent needs, optimize a talented workforce, and keep retention rates high will become key to a company's ability to maintain a competitive advantage. Organizations must shift to a more flexible human capital management approach that facilitates sustainable change. Such a shift requires HR organizations (and the technology vendors and business consultants who support them) to transition from administrative tasks to strategic relevance. Human capital management processes are a system of interrelated parts that can be strategically leveraged and positioned for business advantage and the most successful organizations manage their human capital and talent as strategic assets. Aligning the workforce with business objectives and using talent, performance and workforce measurement to drive decisions improve an organization's ability to succeed.

Table 32: Utility Business Processes and Enterprise Apps for the New Energy Economy, *Jill Febowitz, Practice Director, IDC Energy Insights*

Utilities have spent a lot of time and money installing smart metering and advanced meter infrastructure as part of smart grid projects. Energy efficiency, demand response, dynamic pricing, and buy-back of customer generation are all enabled by smart metering, however, these changes require the utility to revisit business processes and the applications to support them. Challenges abound including making use of volumes of new data, scaling up marketing for energy efficiency, and developing the right pricing to get the desired response. This session will cover those back office changes that utilities will be making as system-wide rollouts of smart meters unfold.

12:40 – 1:20 pm Lunch Special Interest Sessions

Pick up a box lunch before your session.

Building the Decision Management Platform, *Stephen Hendrick, Group Vice President, Application Development and Deployment Research*

Today, most IT activities are process-led and pre-scheduled or on-demand. However, organizations stand to gain by making IT activities data-driven and decision-led. In this lunchtime presentation, Mr. Hendrick will discuss how decision-oriented technologies including business rules, analytics, and complex event processing are converging into a decision management platform and the challenges, opportunities, and benefits that result.

Creating a Dynamic Competitive Pricing Tool, *Brian Clarke, Vice President, Pricing Evaluation*

No pricing strategy is complete without a firm understanding of the competitive pricing landscape. However, this assessment is typically under served by choppy pricing intelligence in the form of occasional bid intelligence from sales or limited checks of competitor pricing off the Web. In today's market, prices and products change rapidly on a regular basis. Mr. Clarke will show you how to build a dynamic competitive pricing tool that stays relevant in this changing market, by examining techniques for product comparison and finding various types of pricing data.

The SMB IT Spending Bounceback of 2010 – Not Where You Think, Not Who You Think, *Ray Boggs, Vice President, Small/Medium Business and Home Office Research*

The IT spending decline among SMBs last year was sharper than anticipated and came from segments that had previously resisted economic pressure. But even more interesting will be the recovery patterns, as the return to "business as usual" simply doesn't happen. New U.S. SMB survey work and worldwide forecasts will help us aim the spotlight on the transformed SMB market. Join IDC's SMB team in a discussion of shifts in customer attitudes and changes in key market segments that will set the stage for SMB acquisition and use of advanced technology for the coming year and beyond.

12:45 – 1:15 pm Analyst One-to-One Meetings

Open to all attendees by appointment. Visit the Analyst Connection Kiosk to schedule your meetings. Visit www.idc.com/directions10 for a list of analysts available for one-to-one meetings.

Track 1: Tech Marketing in 2010: Trends, Forecast, and Essential Guidance, *Rich Vancil, Vice President, Executive Advisory Group*

Rich Vancil will provide IDC's new "Tech Marketing Barometer" survey results, just completed in March. Where are marketers placing their bets for 2010? This session will outline detailed budget guidance and marketing mix allocations analysis. Also provided will be a review of marketing staff and headcount trends.

Track 2: Three Data Centers – One Vision? *Michelle Bailey, Research Vice President, Enterprise Platforms and Datacenter Trends*

In addition to the continued evolution of traditional enterprise data centers and distributed branch office sites, a new data center type has emerged over the past decade. The "Mega Data Center" leverages IT in new and interesting ways in order to create a highly dense, power efficient and low cost heterogeneous infrastructure that scales exceptionally well. Although they clearly have unique differences, this session will include what can be learned from the development of the "Mega Data Center" and how these learnings can be applied to large heterogeneous data centers or small branch office sites.

Track 3: The Global Digital Consumer – Who Are You? *Michael DeHart, Research Director, ConsumerScape 360° and Primary Research*

Across the globe, consumers are more connected than ever and using digital devices, services and media at dizzying, yet varying rates. Some regions tend to use more mobile technologies while others are more compute-intensive, but universally, we all need to be connected and entertained – the question involves how different segments accomplish this. Building on IDC's global ConsumerScape 360 survey, this presentation will include a global and regional comparison of who makes up these digital consumer segments and how they differ in terms of device and service ownership and usage, psychographics, and demographics and will share key insights into how these groups and their behaviors are expected to evolve.

Track 4: Intelligent Workspaces, *Sue Feldman, Research Vice President, Search and Discovery Technologies*

The next decade will see the transformation of today's software applications, reflecting the current migration to information-centered enterprises. Today's applications for business users are centered on a specific technology or application, such as search, business intelligence, content management or CRM. This enforces an unproductive work environment in which users must move from one application or information silo to the next in order to get their jobs done. Intelligent workspaces create a polished integrated work environment for information workers – hiding silos and applications while combining collaboration, information, information access, information management, and workflow into a single environment with a well-designed interface. Successful vendors will build intuitive applications that combine multiple technologies and information sources with embedded knowledge of a specific vertical industry or business process to facilitate processes such as sales, research, loan processing, marketing, financial analysis, eDiscovery, or call centers.

Track 5: Balancing Information Conservation with Information Proliferation, *Benjamin Woo, Vice President, Storage Systems*

As the amount of data continues to grow exponentially, technologies that help to protect, conserve and manage this data in an efficient manner become increasingly critical. Technologies like deduplication, scale out architectures, thin provisioning, compression, and space efficient snapshots can provide relief, but conflicting technologies like replication ensure reliability, performance and accessibility. What is the balance between information conservation and information proliferation, and what is necessary to manage and maintain this balance?

Track 6: The Path to Social Business Enlightenment, *Michael Fauscette, Group Vice President, Software Business Solutions*

Web 2.0 has created a groundswell of change that is spilling over into the business world. What started as a way to leverage the potential of the Internet to interact in new and different ways online has morphed into new ways to market, sell and service customers and design products, as well as new ways for employees to do their jobs in an open, connected way. The opportunities for business to transform the way they interact with customers, partners and employees as well as change the fundamental way they design products and services are increasing at a break-neck pace as we gain more real world experience and understanding of the power of a social business transformation. In this presentation, IDC senior analyst and group vice president Michael Fauscette will look at how we evolved from consumer Web 2.0 to the concepts of social business, as well as look at real world examples of how these concepts are changing business today. Survey data will be used to show current and planned adoption of social software tools and where companies and technology vendors will likely take the rapidly evolving social business movement.

Track 7: Transforming and Building the Intelligent Enterprise, *Rebecca Segal, Vice President, Global Services Markets and Trends; and Sebastien Ruest, Vice President, Infrastructure, Software and Services Group*

Companies seeking to transition from legacy infrastructures to newer, more efficient, more intelligent, cloud-friendly models lack the expertise and capabilities to do the job themselves and turn to services firms for help. Recent surveys indicate that the majority of customers seeking to undergo a major transformation will not do so on their own, but with the help of services providers. They will seek out strategy and assessment services, help in piloting and developing proof of concepts, building, testing, integrating and deploying new models, and establishing governance and management practices. This session will explore how customers plan to engage Professional Services providers as they seek to leverage more intelligent computing platforms and achieve the business results they need.

Track 8: Evolution of Wireless Services: Market Landscape, *Amy Lind, Research Manager, Consumer Broadband and Mobile Services; and Carrie MacGillivray, Senior Research Analyst, Mobile Enterprise and Telecom*

The U.S. wireless industry is evolving rapidly as mobile operators struggle to transform their networks and business models. Operators are increasingly under pressure to respond quickly to shifting demand dynamics, intensified pricing pressures, and changing end-user requirements. The current global economic crisis has further exacerbated these trends. In this session, Ms. Lind and Ms. MacGillivray will identify the key trends that have the potential to alter the wireless landscape in the coming decade. They will present an overview of the U.S. wireless market including the growing battle between prepaid and postpaid wireless services; emerging device trends; the rise of mobile broadband and the evolution from 3G to 4G; and the impact of wireless displacement on wireline voice and data services. They will also provide an outlook for operator prospects and what the services and business models that operators should be exploring will look like in this new and rapidly evolving market environment.

2:20 - 3:00 pm Track Sessions

Track 1: Three Recipes for Sales Success, *Michael Gerard, Program Vice President, Sales Advisory Practice*

What are the top three ways to ensure sales success? Mr. Gerard will offer real strategies and tactics to improve marketing and sales alignment with the ultimate objective of significantly impacting sales productivity and success. Key focus areas will include account planning techniques, market and customer intelligence, and pipeline health. Mr. Gerard will also illustrate where marketing can best support each of these sales activities. IDC leverages its Sales Productivity Framework for this insight and guidance, coupled with recent best practices and benchmarking studies completed with sales organizations.

Track 2: Ten Tips to Run IT and the Data Center in a Converged, Intelligent Infrastructure, *Vernon Turner, Senior Vice President, Enterprise Infrastructure, Consumer and Telecom Research*

When server, storage and network environments begin to blend into a single converged platform, what are the key challenges and opportunities for CIOs, CFOs, and IT Management? Customers will be excited by the potential to reduce complexity within their environments, but what steps will have to be taken to look after their legacy systems and storage? Does a converged platform mean that this is the end for stove pipe organizations? Does it mean that IT will be driven by a true services model that measures and distributes consumption and usage based models? Will this trend develop into an infrastructure filled with intelligence, or one filled with liabilities? There are lots of questions to be asked if indeed convergence is what the CIO wants.

Track 3: A Stack of Nodes: The Connected Living Room, *Greg Ireland, Research Manager, Consumer Markets: Video*

Traditional consumer electronics devices have been islands of functionality. Today they are quickly becoming nodes on an ever expanding network of connectivity as game consoles, HDTVs, Blu-ray players, set-top boxes and media adapters vie for dominance in the connected home. How do these devices stack up against one another and what will drive consumer interest? How is the market taking shape, and what does it mean for legacy content distribution channels and relative positioning of leading and emerging consumer electronics brands? Which technologies and business models are poised to enable further development? And what does all of this mean for media? Take a break from the doom and gloom of the economy and face the challenges and opportunities of CE and entertainment content distribution. 3D glasses optional.

Track 4: Achieving Competitive Differentiation Through Pervasive Business Intelligence and Analytics, Dan Vesset, Vice President, Business Analytics Solutions

Is our organization ready to leverage its data assets to gain competitive advantage? What is the level of our organization's analytical orientation? Are we investing scarce resources to have the greatest effect on improving our organization's business intelligence competency and pervasiveness? End-user organizations of all sizes are trying to answer these questions as evidence of the competitive value of BI and analytics is growing. The latest IDC research of over 1,100 organizations shows that there is a correlation between indicators of pervasive BI and the organization's competitiveness within its industry. In this session, Mr. Vesset will present IDC research identifying six indicators of pervasive BI and analytics and the five factors that management can affect to have the greatest impact on these indicators. The session will also provide recommendations to technology vendors for addressing end-user demand for more pervasive business intelligence and analytics.

Track 5: Making Sense of and Taking Action on Unstructured Data, Scott Lundstrom, Research Vice President, IDC Health Insights

Leading-edge organizations are leveraging unstructured information to automate business processes, gain new business insights, and improve decision making. These organizations are taking advantage of the intelligence in their unstructured information to improve workflow and event management, risk management and process quality. They are also using the analysis of unstructured information to identify new business opportunities and reduce costs. Join us for a discussion on how leading organizations are extracting maximum value from unstructured information today. This session will provide a series of case studies of customers from diverse industries including healthcare, life sciences, manufacturing, media and entertainment, and others.

Track 6: Social for All: How Social Technologies are Used Around the Globe, Karsten Weide, Program Director, Media and Entertainment

We all know social media usage is soaring in the United States – but what is the situation in other major markets around the world? From developed nations such as the U.S., Japan and the U.K. to developing countries such as Brazil, Russia, India and China, this presentation will tell you about the different levels of adoption of social media amongst consumers and compare usage of social technologies for personal and business use across PC and mobile platforms. Learn how online behavior is different between users who consume social media and those who do not. What are the attitudes driving the use of social media across the globe? Come and join this presentation by IDC's Karsten Weide, who will introduce you to some of the highlights from our latest worldwide ConsumerScape 360 survey, as well as other recent survey work from across IDC which explores how social media revolutionize our lives across the world.

Track 7: Transforming the Workforce: Models for Intelligent Workforce Management

Moderator: Cushing Anderson, Vice President, Project Based Services Research; and Panelists: Lisa Rowan, Program Director, HR, Learning and Talent Management Strategies; and Stephen Loynd, Research Manager, Contact Center Services

How can enterprises leverage "human capital management" and "workforce analytics" to enable employees to fulfill the goal of the intelligent economy? Will this be a major opportunity for services firms? High performing organizations will leverage a variety of models to maximize efficient workforce performance. Some firms will rapidly retrain their workforces to adapt to new circumstances, others will leverage work-at-home models or contingent workforces to ensure appropriate capabilities. But whatever models are leveraged, the ability to anticipate talent needs, optimize a talented workforce, and keep retention rates high will become key to a company's ability to maintain a competitive advantage. Technology and services firms must be in a position to help their clients manage human capital and talent as strategic assets.

Track 8: Coming of Age in the Energy Economy: Networks Power Up the Intelligent Grid, Marcus Torchia, Research Manager, Intelligent Grid Strategies, IDC Energy Insights

The new energy economy builds on a modernized electric grid driven by efforts to support sustainable development, carbon cap and trade markets, and energy efficiency programs. Supporting new classes of devices and applications in the energy sector, communication network and services investments provide fresh growth opportunities. In this session, we discuss market drivers, innovation centers, and technology selection preferences in the utility vertical, as well as examine value created by new service models.

Track 1: Leadership Panel: Best Practices in Marketing and Sales for 2010, *Moderators: Rich Vancil, Vice President, Executive Advisory Group; and Michael Gerard, Program Vice President, Sales Advisory Practice*

A big hit at Directions last year, we have once again assembled a panel of some of the best and brightest in Tech marketing and sales for their guidance and outlook. Mr. Vancil and Mr. Gerard will moderate the discussion, asking panelists to comment on sales and marketing trends as well as the specific themes covered elsewhere in this track. Panelists will also be asked to provide illustrative examples of success from which others can learn. This is an interactive session where members of the audience will be invited to ask questions of this select group of sales and marketing leaders. Panelists include some of the most active and insightful members of the IDC CMO and Sales Advisory Services – on-going membership of sales and marketing executives who come together regularly to discuss investments, operations, and best practices.

Track 2: Bringing the Private Cloud to a Data Center, *Matt Eastwood, Group Vice President, Enterprise Platforms*

On the heels of a significant reduction in infrastructure investment, many IT organizations continue to struggle to balance IT and business goals and objectives. Blades, multi-core processing and virtualization continue to hold great promise for the traditional enterprise data center, but most organizations are only beginning to realize the true benefits associated with a consolidated IT environment. As consolidation extends deeper into many organizations and workloads, IDC believes that in 2010 many CIOs will begin to look at private clouds as an important path in the journey to a dynamic IT. This session will explore not only what it will take to build and implement a Private Cloud Infrastructure, but also what impact it will have on the IT skills in the traditional data center.

Track 3: Notebooks to Smartphones: Devices on the Go, *Bob O'Donnell, Program Vice President, Clients and Displays*

In an increasingly mobile society, the demand for devices that provide access to information, communication and entertainment on the go is also on the rise. From mininotebooks and smartphones to handheld GPS, portable media players, gaming handhelds, e-book readers, mobile internet devices and more, there is, in fact, a plethora of device options. But while some segments of people own and use more than one of these devices, most only want to carry and prioritize one or two of them – so which ones will win and lose and with whom? In this talk, Mr. O'Donnell will discuss IDC's latest views on these categories as well as some of the critical services and software that need to develop in order to bring best-in-class solutions to market tomorrow and in the coming years.

Track 4: Strategic, Tactical, and Operational Decision Management: Exploring Opportunities in Vertical Industries, *Moderator: Henry Morris, Senior Vice President, Worldwide Software and Services; and Panelists: Simon Ellis, Practice Director, Supply Chain Strategies, IDC Retail Insights; and Jill Feblowitz, Practice Director, Business Technology, IDC Energy Insights; and Dana Wiklund, Director Global Risk Management Practice, IDC Financial Insights*

IDC presents a model for decision management, followed by a discussion of high value decisions amenable to optimization in three key vertical industries. Strategic decisions set the long-term direction for the organization, a product, a service, or an initiative and result in guidelines within which operational decisions are made. Operational decisions focus on a specific project or process and result in the formation of a type of policy, coordinated through a policy hub. Tactical decisions must apply the policy or rule in a specific case, which lends itself to automation. The key to performance management is to improve decision effectiveness at each level, closing the loop between strategy and execution. Analytics and optimization is being widely applied to a broad range of decisions with the highest payback on vertical-specific processes.

Track 5: Information Governance in the Hyper-Extended Enterprise, *Vivian Tero, Program Manager, GRC Infrastructure*

The 2009 IDC *Digital Universe Study* concludes that digital data will reach 2501 exabytes in 2012 – five times its size in 2008. At the same time, growth in IT budgets is not keeping up with the digital volume growth. Corporations therefore have to plan for an increase in the volume of compliant-, eDiscovery- and security- intensive data while meeting operational objectives and budget constraints. Risk and compliance are the "headline grabbing" facets of information governance, but true information governance should also address the requirements of enabling sound information management to address strategic business alignment, business value creation, business service delivery, and resource allocation. This IDC presentation explores the linkages between the information management with IT operations, IT storage, and IT security and discusses why and how corporations can take advantage of current and emerging technologies to enable better alignment across these IT disciplines and enable information governance.

Track 6: Joining the Conversation: How Social Media Technologies are Enhancing Employee and Customer Relationships, *Mary Wardley, Program Vice President, CRM and Enterprise Applications*

Customers are congregating online and they're talking about you and your brand. Employees are congregating in-person - and online - talking about the organization with each other and with their customers. Are you there to listen and interact with them? In the era of the social web, customers and employees are demanding both different ways of interacting and different experiences in that interaction. Across all of the traditional CRM functions, sales, marketing, public relations and customer service, companies are witnessing a powerful shift in customer expectations. Internally, employees are demanding more immediate methodologies for interacting with colleagues and reaching out to customers. Social strategy encourages an environment where decision making is distributed, all participants have a voice, and employees and/or customers feel they can initiate change. Using newly collected survey data and customer interviews, Ms. Wardley will look at how companies can take advantage of social software and tools to join the conversation with their customers and employees, build community and transform their business to meet new desires and demands.

Track 7: Outsourcing as a Means of Enabling an Intelligent Enterprise, *Moderator: David Tapper, Vice President, Outsourcing and Offshore Services Market Research; and Panelists: Rona Shuchat, Program Director, Application Outsourcing Services; and Stephen Loynd, Research Manager, Contact Center Services; and Mukesh Dialani, Senior Analyst, Worldwide BPO Services*

The face of outsourcing is changing. Gone are the days of lift-and-shift. Today's customers are looking for innovation and value creation. Increasingly, companies are looking to outsourcers and service providers that can deliver to them services that incorporate "intelligent" capabilities that help provide competitive advantage. These capabilities are offered via outsourced product development and testing services focused on creating new application service delivery models (e.g. SaaS-enabled); BPO analytics that can help customers enhance the enterprise's "intelligence" of their customers and opportunities; new customer care outsourced services designed to optimize the quality of service via new models such as hosted contact center and homeshoring; as well as outsourced public and private clouds that support customer need in adapting to market changes more rapidly while ensuring "intelligent" financial management. The goal of this panel session is to provide vendors with an overview of these four key areas of outsourcing that are becoming more critical for vendors to include in their portfolio of offerings.

Track 8: Next Generation Wireless: LTE and the Greening of the Telecom Infrastructure, *Godfrey Chua, Research Manager, Wireless and Mobile Infrastructure*

"Going green" has become a pervasive slogan in today's marketplace. Growing awareness among policymakers, who are introducing more stringent environmental regulation and guidelines, and consumers, who are adapting buying habits and lifestyles toward more sustainable choices, is prompting businesses across the globe to enhance product sets and build marketing strategies around the new metric of green credentials. Whereas the extent to which businesses are embracing going green varies from company to company and from segment to segment, the directional path toward greater greenness is evident. For the mobile operator, the role in going green encompasses both enablement and participation. They provide the connection to critical information that allows for the more efficient utilization of resources, operational optimization, and a reduction in waste. The mobile network plays an important role in enabling behaviors that reduce carbon footprints (i.e. telecommuting and video conferencing). Mobile operators are also themselves among the more aggressive to embrace going green in their day-to-day operations. Ultimately, mobile operators both enable green and have the potential to themselves serve as role models in the green revolution.

This session will examine the key technology and market trends defining the mobile infrastructure space today, the role of new technologies, such as LTE, in enabling the next generation, "green" mobile operator, and the relationship between green networking and overall market competitiveness.

4:00 - 5:15 pm **Closing Session: CIO Panel**

The IT Executives Building the Intelligent Economy, Moderators: *Crawford Del Prete, Executive Vice President, Worldwide Research; and Meredith Whalen, Group Vice President and General Manager, Insights*

Panelists include:

- o Andres E. Carvallo, CIO, CTO, and Chairman of the Smart Grid Task Force, Austin Energy*
- o Norm Fjeldheim, Senior Vice President and CIO, Qualcomm*
- o Keith Morrow, Senior Vice President & CIO, Blockbuster*
- o Simon Nazarian, Executive Director - Information Technology - Office of the Chief Architect, Enterprise Architecture Delivery, Kaiser Foundation Health Plan*
- o Teri Takai, CIO, Office of the State of California*

As a capstone to a full day of discussion on the intelligent economy, hear directly from those building it. Join Crawford Del Prete and Meredith Whalen as they moderate a panel discussion with leading IT executives from the organizations that have already embarked on the intelligent economy journey. You'll see how various industries are employing technology to carry out initiatives such as operating smart grids, working with electronic medical records, improving citizen service and customer service, and optimizing supply chains. Bring your questions, ideas and thoughts to this interactive session.

5:15 - 5:30 pm **IDC Closing Remarks**

Crawford Del Prete, Executive Vice President, Worldwide Research