



~ CONFERENCE AGENDA for BOSTON ~
[subject to change]

Directions 2018**Innovating in the DX Economy: From Experimentation to Automation**

7:15 am Registration and Breakfast

7:15 am – 4:00 pm Pavilions

Join analysts, product specialists, and peers to discuss business practices and experience demos that will help you realize future growth potential. Pavilions are open until 4:00 pm for walk-up service and discussions. All attendees are welcome to stop by without appointment.

IDC Custom Solutions Pavilion

Visit the IDC Custom Solutions Pavilion any time throughout the day and meet with experts who can help you harness the power of IDC's global research, thought leadership, and innovative best practices to drive your business forward. Learn how IDC Custom Solutions practice areas can assist you to develop and deliver programs designed around your specific business goals using a foundation of research and insights across technologies, geographies, and industries as well as hear from experts who focus on strategy, sales and marketing, buyer behavior, and business measurement and management.

IDC Tracker Pavilion

Stop by the IDC Tracker Pavilion where our team of experts can introduce you to IDC's new Tracker products and tools to utilize IDC Tracker data, including the online Tracker Query Tool. IDC's Trackers provide accurate and timely market size, vendor share, and forecasts for hundreds of technology markets around the globe. Using proprietary tools and research processes, IDC's Trackers are updated on a semiannual, quarterly, and monthly basis. Trackers are provided to clients in our online Web query tool as well as through user-friendly Excel deliverables.

8:00 am – 8:30 am Power Breakfasts

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

Digital Transformation Through the Back Door: How SMB Tactical Needs Will Drive DX Embrace, Ray Boggs, Vice President, SMB Research

The past 12 months have seen a "digital awakening" among small and medium-sized businesses (SMBs) (firms with fewer than 1,000 employees) worldwide. SMBs have long been interested in leveraging technology for competitive advantage but are increasingly looking to coordinate resources and invest for the most efficient digital economy engagement. For many, though, digital transformation (DX) is still less a priority than improving other performance areas. This is the "DX paradox." Join Ray Boggs for an update on the SMB DX journey and how SMBs globally are sharpening technology investments for maximum impact. What technology areas are SMBs looking to strengthen, and what key capabilities will SMBs be looking for in the future from technology providers?

The Impact of Hyperconvergence on People, Process, and Technology, *Eric Sheppard, Research Director, Enterprise Storage and Converged Infrastructure*

Hyperconverged infrastructure (HCI) has now matured into a mainstream infrastructure option for small to large enterprise IT organizations and from edge to core datacenters. The collapsing of compute, persistence, and data services brings with it the opportunity for organizations to refine their application architectures, team structures, operational processes, and workload placement. Over the next decade, IT organizations will continue to consolidate workloads on hyperconverged architectures as a means to reduce cost, enable greater levels of automation, and increase efficiency. The ability of the IT organization to streamline and consolidate infrastructure services can have a strong influence on the enterprise's ability to drive IT and business innovation. This session will discuss the use cases, adoption patterns, and outlook for hyperconverged architectures and their role in different types of datacenters from core to edge locations. Deployment challenges to be anticipated, as well as factors that influence the shift of workloads from three tier to hyperconverged architectures, will be discussed as a means to deliver agility and economic benefits to the organization.

Developing a Business Value-Based Digital Marketing Strategy, *Randy Perry, Vice President, Business Value Strategy Practice*

IDC research has shown that 90% of large organizations have deployed IT initiatives in support of digital transformation. Demand for technology that accelerates digital transformation is here today and growing. Companies unable to take advantage of this trend may be gone in five years. In this session, Randy Perry will offer best practices: Provide research-based content, tie your technology solutions to improving business outcomes and business performance, integrate your sales and marketing activities to deliver a compelling business value case, leverage new interactive tools (80% of the buyers' journey is done online), improve customer experience with targeted personalized programs and content, and differentiate your marketing message (everybody is talking digital transformation, what's your unique story?).

8:45 am – 10:20 am General Sessions

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

The 3rd Platform's Second Chapter: The Digitized Economy, Digital-Native Enterprises, and the New IT World Order, *Frank Gens, Senior Vice President and Chief Analyst*

Within the next three years, over half of the global economy will be digitized. This onrushing digital transformation (DX) tipping point will become a ticking clock in the heads of all business leaders, sounding out a message of "faster, faster" around enterprises' efforts to become digital native.

The technologies of the 3rd Platform's second chapter will turbocharge this race to the DX economy, unleashing enterprises' "multiplied innovation" through platforms, open innovation ecosystems, massive data sharing and monetization, and hyper-agile application deployment technologies. An expanding digital developer population, the blockchain-fueled rise of digital trust, richer AI services, deeper human/digital interfaces, and much more diverse cloud services will also help drive innovation.

As the pages turn on the 3rd Platform's second chapter, a new "IT world order" will emerge around changing technologies, new offerings, evolving business models, and the hottest customer DX use cases. New power positions will emerge, and leadership ranks will be shuffled. Join Chief Analyst Frank Gens as he shares IDC's latest research and insights around prioritizing technologies and models of the 3rd Platform's second chapter, bringing value to customers on their journeys to become digital-native enterprises, and positioning organizations for leadership in the new IT world order.

Developers in the Driver's Seat: The New DX Power Brokers, *Al Gillen, Group Vice President, Software Development and Open Source*

Software developers have long been the engine behind digital transformation (DX), and their value has never been higher. Today, most companies need to become software companies — in one form or another — if they hope to be competitive in the future. The early movers in the industry, including Amazon, Uber, Tesla, and Airbnb, demonstrated how software innovation and an original business model could disrupt and undermine competing business that held on to manual processes for too long.

Join Al Gillen as he examines five major developer/development trends that are reshaping business today: a shift of developer skills away from monolithic application design to microservices; a shift away from waterfall staging to an agile, fast-fail development process that values innovation and risk; the embrace of modern development languages and polyglot development tools; the consumption of cloud services for application functionality and as deployment environments; and perhaps most important, multiple demographic shifts in the skills that define a developer and the changing center of gravity for developers — which is moving to Asia. This presentation will include examples of how companies successfully negotiated a development transition and highlight the challenges for businesses that don't have the luxury of starting with a clean slate.

10:20 am – 10:50 am Networking Break and Pavilions

10:20 am – 10:50 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/directions for a list of analysts available for one-to-one meetings.

10:50 am – 12:00 pm General Sessions

Blockchain, Security, and the Future of Digital Trust — Why This Matters Now, *Bill Fearnley, Research Director, Worldwide Blockchain Strategies*

Blockchain, distributed ledger technology (DLT), and smart contracts continue to gain momentum in a myriad of use cases across a wide variety of industries. Enterprises are increasing their investments in blockchain to transform how they deliver products and services, gain new insights to gain a competitive edge, and improve their financial and operational performance. The fact that blockchain ledger records are secure, sequential, and immutable is improving the security of customer information as well as business and transaction records.

Blockchain and distributed ledgers will continue to change the future of digital transactions in the new data economy and transform the nature of digital trust. Regulators and central banks have also voiced their support for blockchain and DLT and smart contracts because they can improve the security of financial systems and transactions worldwide. In his presentation, Bill Fearnley will share an update to our Four Forces model and how distributed ledgers and smart contracts will change digital trust between enterprises and their customers, suppliers, and regulators and provide guidance on how industries will want to invest in blockchain technology to gain a competitive advantage and improve financial performance.

When Computing Becomes Human: Automation, Innovation, and the Rise of the All-Powerful Service Provider, *Michelle Bailey, Group Vice President, General Manager, and IDC Research Fellow, Datacenter and Cloud*

With the advent of new cognitive capabilities along with massive computer-generated automation, three things are immutable: Applications and data will be increasingly fragmented across a new generation of infrastructure, service provider ecosystems will challenge the relevancy of incumbent technology vendors, and the new IT buyer will favor innovation over perfection.

For many enterprises considering the digital disruption in their industries today, the risk of doing nothing is becoming greater than the risk of failure. The allure of new revenue streams, rapid adoption in customer-first business models, and data-driven operational efficiencies is leading to a watershed moment for enterprise technology adoption. With the new expectation that technology will not only provide computational support but be an intrinsic part of decision making and predicting success, a new class of providers is emerging in support of a new IT buyer.

In this session, Michelle Bailey will discuss the winners and losers in the evolving interconnected enterprise, examine how cloud will drive continuous innovation, and highlight why service providers will dominate every technology sector. She will also examine how successful enterprises will address the looming talent gap and provide insight on how to win mindshare with the new IT buyer.

12:00 pm – 1:30 pm Lunch and Lunchtime Sessions

Pick up a box lunch before your meeting or session.

12:15 pm – 12:45 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/directions for a list of analysts available for one-to-one meetings.

12:15 pm – 1:20 pm Lunch Roundtables

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

Table 1: Artificial Intelligence in Retail Selling, Marketing, and Supply Chain, *David Schubmehl, Research Director, Cognitive/Artificial Intelligence Systems*

Artificial intelligence (AI) is in production in customer-facing, associate-facing, and process use cases. It's not rocket science. Implementation needn't be a science project. Vendors need to demystify AI for retail business and IT executives. We'll discuss what differentiates AI from advanced analytics, why vendors succeed, examples of AI's benefits, and keys to customer adoption. Learn what it takes to position your company in the accelerating AI ecosystem.

Table 2: Becoming the Service Company of the Future, *Rebecca Segal, Group Vice President, Worldwide Services, and Curtis Price, Vice President, Infrastructure Services*

IDC has created a framework to help services companies evaluate their readiness to succeed in the future focused around four key dimensions: leadership, organization, tooling, and customer focus. This roundtable will explore those dimensions with particular focus on the tooling dimension and how automation is disrupting and enabling greater efficiencies in services delivery.

Table 3: Blockchain, *Bill Fearnley, Research Director, Worldwide Blockchain Strategies*

Blockchain can change how goods and services are delivered and the power to change the revenue and expense equation of market participants and intermediaries in multiple industries. As a result, blockchain is likely to drive changes in market share, operating profits, and competition over time. We will discuss near-term and longer-term uses case trends with advice on how to take advantage of opportunities and how to address business and technology challenges in a variety of industries.

Table 4: Blowing Up the Funnel: New Strategies for Marketing and Sales Collaboration, *Kathleen Schaub, Program Vice President, CMO Advisory and Customer Experience Practice*

IDC predicts that one in five marketing leaders will abandon the traditional funnel in favor of a customer-centric approach. Already, 40% of tech companies use a customer journey model to inform their marketing investment decisions. We'll discuss how strategies such as account-based marketing, AI-driven engagement, concierge selling, and loyalty-first marketing are radically upending the 20th century sales funnel model.

Table 6: Cloud Data Management and Protection — Going Beyond Protection, Availability, and Recovery, *Andrew Smith, Senior Research Analyst, Storage Software*

This roundtable will focus on IDC's new cloud data management and protection market segment, key players and market trends, and efforts underway at IDC to track vendor and market performance across three new functional markets: disaster recovery as a service, archive as a service, and backup as a service.

Table 7: Collaborative Innovation: A Cross-Team, Cross-Tool Sport, *Aly Pinder, Program Director, Service Innovation and Connected Products*

As innovation is a team sport that requires a cross-discipline team working across multiple business processes and systems, the collaborative innovation market encompasses a wide range of technology and services. Innovation is not only related to new products — it is also necessary in manufacturing, supply chain, marketing, and services. Attend this roundtable session to discuss how your organization can support collaborative innovation success.

Table 8: Container Infrastructure Software — Driving the Next Generation of Compute, *Gary Chen, Research Manager, Software-Defined Compute*

Containers have been immensely hyped as the next compute primitive for next-generation applications. Learn how enterprises are adopting containers and how they're using them. We'll also discuss the impacts on server virtualization and private and public cloud.

Table 9: Content-Centric Workflow Transformation and Your DX Initiatives, *Holly Muscolino, Research Vice President, Content Technologies and Document Workflow, and Terry Frazier, Research Director, Content Technologies and Document Workflow*

In a recent IDC survey, over 91% of respondents with DX initiatives said that their strategy specifically included how structured and unstructured content is used and managed by their organization. Respondents were asked to especially consider content-intensive workflows including creation, collaboration, access, distribution, and storage. This discussion will center on the technologies and trends transforming content-centric workflows.

Table 10: Data Intelligence in the DX Platform, *Stewart Bond, Research Director, Data Integration and Integrity Software*

Data is at the heart of digital transformation and requires a shift in focus from the three Vs of big data to the three As: awareness, augmentation, and automation — providing the data intelligence needed to locate and leverage information assets. Join Stewart Bond and peers for a discussion of how data integration and integrity software is giving data professionals the intelligence needed to reduce time and effort achieving data-driven outcomes.

Table 11: Data Lakes: Success Mantra, *Ritu Jyoti, Research Director, Enterprise Storage, Server and Infrastructure Software*

Data is core to digital transformation (DX). While the term data lake is usually associated with Hadoop, data lakes can also be used effectively without incorporating Hadoop. Data lakes are becoming a core data analytics platform, but for many organizations, they are failing to support the business objectives. Learn best practices to turn data lake investment into a valuable tool for DX.

Table 12: Digital Advertising: Traditional TV Advertising? Connected TV Advertising? Both? *Karsten Weide, Vice President, Media and Entertainment*

There are now seven video channels through which advertisers can market their products and services: traditional TV, programmatic TV, addressable TV, connected TV, desktop video, mobile video, and video on demand. Given this fragmentation of channels, where should you put your marketing dollars? How real is "omni-channel" advertising? And where are customers in their transition from traditional TV to digital video anyway?

Table 13: Digital Divide Evidenced by New CIO Sentiment Survey, *Bill Keyworth, Research Vice President, IT Operational Excellence*

As digital transformation (DX) accelerates business change within almost all enterprises, IDC's research confirms a growing chasm between "digital-native enterprises" and lagging IT organizations. Unique DX challenges for both IT and LOB executives are explored within IDC's 2017 *CIO and LOB Sentiment Surveys*, identifying those characteristics of thriving versus surviving enterprises being transformed through DX innovation accelerators.

Table 14: Digital Transformation in the Federal Government, *Adelaide O'Brien, Research Director, Government Digital Transformation Strategies, IDC Government Insights, Shawn McCarthy, Research Director, IDC Government Insights, and Ruthbea Yesner, Research Director, Smart Cities Strategies, IDC Government Insights*
This roundtable will delve into the challenges and successes of the federal government in deploying digital transformation initiatives.

Table 15: A Discussion of IDC Innovation Accelerators in Health and Life Science, *Lynne Dunbrack, Research Vice President, IDC Health Insights*

Come join IDC Health Insights analysts for a roundtable discussion of how healthcare and life science organizations are leveraging IoT, cognitive computing, robotics, 3D printing, AR/VR, next-generation security, and blockchain to support value-based health and knowledge-based medicine.

Table 16: Enabling Better Adoption and Deployment of HCM Analytics: What Role Do Vendors Play? *Kyle Lagunas, Research Manager, Emerging Trends in Talent Acquisition and Engagement*

As the business embarks on its digital transformation journey, HR buyers are looking to their vendor partners to lead them to the proverbial promised land. In this roundtable, we will discuss the opportunities and challenges that this megatrend presents to those willing to step up to the plate.

Table 17: Enabling Quality/Security for DevOps and Agile Automation, *Melinda Ballou, Research Director, Agile ALM, Quality and Portfolio Strategies*

Continuous testing is a DevOps bottleneck; yet agile quality and security drive digital transformation. What strategies are enterprises adopting to address these challenges? Using four ASQ IDC MarketScapes, we will discuss tools decisions, process change, and quality for code analytics, for DevSecOps and for modern development.

Table 18: Enterprise Mobility: Unlocked Device Strategies and Trends, *Bryan Bassett, Research Analyst, Mobile Enterprise: Device Solutions; Anthony Scarsella, Research Manager, Mobile Phones; and William Stofega, Program Director, Mobile Device Technology and Trends*

Unlocked smartphones are quickly gaining ground among consumers and business users alike — with cost savings being the leading cause of enterprise IT buyers choosing to adopt and unlocked device strategy. Learn why flexibility between carriers, faster OS updates, and broader handset selections are causing unlocked mobile devices to proliferate in U.S. enterprise environments.

Table 19: The Evolving Use of NVMe in Enterprise-Class Storage Arrays, *Eric Burgener, Research Director, Storage*

NVMe is starting to have a real impact on enterprise storage revenue. There are vendors of high-performance systems targeting dedicated application deployment as well as more mainstream vendors beginning to use NVMe technologies in their flagship enterprise storage arrays. This roundtable session will discuss how NVMe is evolving in the enterprise storage space.

Table 20: The Future of AI Interfaces, *Carrie Solinger, Senior Research Analyst, Cognitive/AI Systems and Content and Rich Media Analytics*

There are two dominant conversations about artificial intelligence: AI in broad strokes and AI in minutia. Our roundtable focuses on a burgeoning topic that should be on everyone's mind: the future of AI interfaces. From voice control to motion and gesture control, we will talk about these specific market technologies as well as how this specific market fits into the overall cognitive and AI systems conversation overall.

Table 21: Future of Building Applications with New Platform Technology, *Larry Carvalho, Research Manager and Lead Analyst, Platform as a Service*

APIs, containers, microservices, and cloud functions are increasingly being adopted by enterprises to accelerate application development, deployment, and delivery enhanced by DevOps. Open source initiatives are increasingly changing the platform ecosystem. Join Larry Carvalho in a discussion to understand how these changes are affecting the consumption of platform services.

Table 22: IDC's Five Digital Masteries: Assessing an Enterprise's Digital Journey, *Shawn Fitzgerald, Research Director, Digital Transformation Strategies*

This lunch roundtable will present, define, and discuss IDC's five digital dimensions and masteries for digital transformation. Beyond these five masteries, levels of maturity will be presented and discussed including overall maturity trends, the digital divide comparing and contrasting thriver and survivor performance along the masteries, and attributes of leading companies in the context of DX investment priorities.

Table 23: The Impact of Collaboration and Communication on Customer Experience, *Alan Webber, Research Director, Customer Experience, and Wayne Kurtzman, Research Director, Social and Experiential Solutions*

A key component to providing a differentiated customer experience is how companies and customers communicate and collaborate. Face-to-face communication was relatively simple. Technology has changed that by providing more channels to communicate and shifting the value applied to communication. Help us discuss the impact different technologies are having on collaboration and communication in the context of the customer experience.

Table 24: Open APIs in Retail Banking — Striving for Connected Banking, *Marc DeCastro, Research Director, Consumer Banking, and Karen Massey, Senior Research Analyst, Consumer Banking*

IDC Financial Insights coined the phrase "connected banking" to describe the ecosystem of omni-experience platforms, payment networks, legacy systems, fintechs, and IT providers that is evolving toward connectedness, with Open APIs leading the charge. Join this discussion on how financial institutions are leveraging Open APIs across the organization for a competitive customer experience and an enhanced approach to legacy transformation.

Table 25: The Power of Analysis: Augmenting Human Efforts with Intelligent Automation, *Ali Zaidi, Research Director, IT Consulting, Systems Integration and Project-Based Services, and Ali Close, Senior Analyst, Finance and Accounting, BPaaS, and Analytics Services*

As the volume of data increases and as data utilization becomes more imperative, the role of RPA, artificial intelligence, and cognitive computing is becoming a key method to increasing efficiencies and collating data enterprisewide. Join this roundtable to discuss how intelligent automation is impacting business analytics services including a look into the competitive landscape, buyer behaviors, and a future view of the market.

Table 26: Quantifying the Business Value of Digital Transformation Initiatives, *Matthew Marden, Research Manager, Business Value Strategy Practice*

Organizations are using digital technologies and initiatives to meet demand from their customers and support their increasingly digital workforces. IDC's Business Value team speaks with organizations about these digital transformation efforts on a regular basis. Learn how organizations are leveraging digital transformation initiatives to generate value by winning more business and becoming more operationally agile and efficient.

Table 27: Rent Versus Own: How Service Providers Make Infrastructure Choices, Kuba Stolarski, Research Director, Computing Platforms

Service providers face a rent versus own decision for their underlying shared services infrastructure. They either "own" a public cloud infrastructure deployment that they will operate or "rent" a third-party public cloud infrastructure as a service as the underlying infrastructure platform for their cloud service. Learn how the three Ss (scale, speed, and sensitivity), coupled with cloud operational and business expertise, factor into a service provider's decision making.

Table 28: SD-WAN an Enabler for Digital Transformation, Ghassan Abdo, Research Vice President, Virtualization/Cloud Services and CDN

This roundtable will provide enterprises and service providers a perspective on how WAN is critical to digital transformation and why SD-WAN is a key enabler as it improves agility, bandwidth management, routing policies, and security. The discussion will include references to an enterprise survey that provide details on SD-WAN adoption by enterprises.

Table 29: Secondary Data Storage — Exploring IDC's New Vision of the Market, Phil Goodwin, Research Director, Storage Systems and Software

The secondary data storage market, including the data protection market, is a major area of focus for both vendors and end users alike. The market continues to undergo changes with new entrants, new means of storing secondary data, and new use cases. Join Phil Goodwin for a discussion on how IDC's market view is expanding to encompass these changes in the secondary storage market and where the market is expected to go.

Table 30: Service Robotics: The Role of AI, IoT, and Mobility in Delivering Smart Collaborative Robots, Bob Parker, Group Vice President, Retail, Energy, Manufacturing, and Financial Services

Intelligence, mobility, and the IoT are playing significant roles in the emergence of the smart collaborative robot. Robots are increasingly being looked upon as a mechanism to deliver business value. This value is being achieved by both deploying robots to automate certain processes but also by the data that is now being captured relative to the business process through connected robots. We will discuss how IoT, AI, and mobility are helping to enable the next generation of robots.

Table 31: Seven Things to Know About Consumer IoT and Wearables in 2018 and Beyond, Ramon Llamas, Research Manager, Devices and Displays, and Adam Wright, Senior Research Analyst, IoT: Consumer

Although the consumer Internet of Things (IoT) remains in its infancy and the wearables market takes slow steps forward, both markets have evolved rapidly in the past few years with a multitude of new products, platform capabilities, services, and partnerships. This roundtable will discuss the emerging developments in these fast-moving markets and explore evolving trends where the consumer IoT and wearables intersect today and in the months ahead.

Table 33: Transforming Mobility in Cities, Mark Zannoni, Research Director, Smart Cities and Transportation

As vehicles become increasingly connected and autonomous and urban mobility continues its digital evolution, transportation in cities will transform, with impacts to city residents and businesses and the overall urban movement itself.

Table 34: UC&C: Cloud and Intelligent Collaboration Solutions Take Center Stage, Amy Lind, Research Manager, VoIP and Unified Communications and Collaboration Services, and Rich Costello, Senior Research Analyst, Unified Communications and Collaboration

Organizations planning to implement UC&C indicate a preference for cloud-based solutions (versus premises) in future deployment plans but a hybrid approach remains a popular option. Organizations are also more likely to invest in UC&C to improve collaboration among employees and external parties, and cognitive and intelligent capabilities such as AI and ML are being integrated into next-gen team collaboration offerings.

12:35 pm – 1:15 pm Lunch and Learns

Pick up a box lunch before your session.

Digital Commerce Marketplaces in the Age of the 3rd Platform, Mickey North Rizza, Program Vice President, Enterprise Applications and Digital Commerce, and Jordan Jewell, Research Analyst, Digital Commerce and Enterprise Applications

Digital commerce marketplaces are creating new commerce experiences for B2C, B2B, B2B2C, and C2C business models. This session will discuss the impact of digital commerce platforms and marketplaces in the DX economy, and how business and consumer transactions are evolving in turn. Topics will include the impact of marketplaces on supply chains, commerce experience evolution, and the role of the sharing economy. This will leave you with ideas on how to rethink your commerce strategy and move beyond the status quo.

Building a Utility Model to Deliver Datacenter Capacity, Susan Middleton, Research Director, Technology Financing Strategies, and Jennifer Cooke, Research Director, Datacenter Management

Increasingly, technology consumers prefer a utility-like model for procuring IT capacity. Leasing colocation space, pay-as-you-go compute, and IaaS and SaaS are a few of the many examples of how on-demand datacenter resources have disrupted the traditional datacenter procurement model. Changes in FASB rules have created a perfect storm. Today, organizations can achieve the benefits of shifting to opex while increasing CEO/CFO insight into total costs. But this will challenge technology providers — as an inability to enable this new procurement model could result in being left off the "short list" of vendors, regardless of technology or service merits. Adopting this model will drive more customer engagements and open up opportunities.

Infrastructure-as-a-Service Customer Adoption Journey — Key Levers to Optimization, Deepak Mohan, Research Director, Public Cloud Infrastructure as a Service

Public cloud infrastructure as a service (IaaS) has now matured into a mainstream infrastructure option for enterprise IT organizations, and IT leaders are increasingly looking to public cloud services to enable and accelerate their digital transformation (DX) initiatives. However, most enterprises are in the early phases of public cloud IaaS adoption and still working through their organizational learning curves around the usage of cloud. It is critical for organizations to navigate this carefully, as early experiences can have a disproportionately strong influence on the enterprise's perception of cloud and its appetite for IT innovation. This session will discuss a model that outlines the typical public cloud IaaS adoption journey, phases and challenges to be anticipated, and factors that organizations need to prioritize and pay attention to at each phase. A good understanding of this can help proactively manage the cloud adoption experience and truly deliver the agility and speed benefits enabled by public cloud platforms.

12:50 pm – 1:20 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/directions for a list of analysts available for one-to-one meetings.

1:30 pm – 2:10 pm Track Sessions

Track 1: Next-Generation Networking for the Intelligent Edge, *Brad Casemore, Research Director, Datacenter Networks*

As the edge plays host to a growing array of new applications, the focus ultimately turns to edge networking, which must deliver the requisite connectivity, bandwidth, low-latency, and network services for both enterprise and service provider deployments. Indeed, as IoT and other edge services proliferate, a one-size-fits-all approach to edge networking and network security will not suffice. In this session, IDC examines the diversity of network requirements and solutions at the edge, covering physical, virtual, and network-as-a-service (NaaS) use cases and application scenarios.

Track 2: Getting Past the Digital Deadlock, *Joe Pucciarelli, Group Vice President and IT Executive Advisor*

From the beginning, there have been numerous obstacles impeding digital transformation, including legacy culture, process, and financial incentives. A new set of challenges that are slowing progress have cropped up. They manifest themselves only after an organization begins its digital journey, growing on the underbelly of a DX initiative and creating a drag on an organization's transformation. Learn how outdated KPIs, siloed organizational structures, tactical digital plans, silos of innovation, and limited expertise are slowing down the progress and potential investments for digital transformation. We will identify ways in which organizations are overcoming these and the opportunities for IT suppliers to assist.

Track 3: What Does It Take to Make AI Work for You? *David Schubmehl, Research Director, Cognitive/Artificial Intelligence Systems*

AI is hard! Is your company building a digital assistant, incorporating image or audio analytics into an application, or developing an intelligent recommendation engine? IDC research shows that an ever-expanding number of vendors are doing so already. The road to AI-enabled solutions is paved with good intentions but littered with roadblocks such as incomplete cognitive/AI software platforms, difficult-to-use open source components, and a lack of staff with relevant expertise. In this session, IDC's lead cognitive/AI solutions analyst, David Schubmehl, will examine end-user and vendor AI requirements that span over a dozen functional technology categories. Schubmehl will draw on lessons from organizations at various stages of adopting open source and commercial AI technology. Recommendations from this session will help your company develop a framework for assessing whether and when to build, buy, or partner for AI capabilities.

Track 4: Leading Customer Experience When You Don't Own It All, *Kathleen Schaub, Program Vice President, CMO Advisory and Customer Experience Practice*

The number 1 objective that enterprises give for embarking on a digital transformation is to "improve our customers' experience with new engagement models," according to a 2017 IDC global study. This response will come as no surprise to CMOs. Marketing has been blazing this trail for more than a decade. In most companies, the CMO has the best resume for leadership in this pivotal area and a high percentage of marketing leaders believe they should lead. Yet another IDC study finds that fewer than 10% of U.S. companies with customer experience initiatives accept that it is primarily a marketing effort and few have put the CMO in charge. Why? Kathleen Schaub shares new data about the customer experience readiness of the marketing organization and insights for leaders who want to drive progress in this compelling cross-company strategy.

Track 5: Autonomy in the Datacenter: What AI Means to IT Orchestration, *Matt Eastwood, Senior Vice President, Enterprise, Datacenter, Cloud Infrastructure and Developers*

Digital transformation involves the management of an increasingly diverse application and data portfolio, which extends from edge to core to cloud. Many organizations are struggling to scale their IT environments while supporting the convergence of IT, OT, and service providers in ways that deliver strategic market advantage. Fortunately, new technologies are rapidly maturing to the point where they can emulate and augment the power of human cognition. Cognitive automation in the datacenter is allowing repeatable tasks to be administrated in ways that enable enterprises to scale infrastructure and increase flexibility. In this session, Matt Eastwood will explore how datacenter design and operations will be redefined by new forms of organizational intelligence that spans pattern detection across multiple data sources.

Track 6: The Unfolding of Modern ERP and Enterprise Applications, *Mickey North Rizza, Program Vice President, Enterprise Applications and Digital Commerce*

Digital transformation is fundamentally changing ERP and enterprise applications. The digital economy is driving businesses to enhance their decision-making abilities to significantly improve their business outcomes. The customer experience has driven the changes in the front-office applications, and now the back-office systems must catch up. This session will help you move your ERP systems and enterprise applications beyond their current state to systems that propel you into a digital enterprise. We will help you navigate your journey from on-premises to cloud, providing insights into the modern ERP and enterprise application systems, lessons learned from those who have traveled this journey, a list of expected future enhancements, and finally guidance so you can digitally transform your back office.

Track 7: Industrial IoT: Enabling Business Outcomes and Industry Use Cases, *Kimberly Knickle, Research Vice President, IDC Manufacturing Insights*

In this session, Kimberly Knickle will discuss the top IoT use cases that are gaining ground in industries such as manufacturing, oil and gas, and utilities. She will identify what's driving the adoption and key challenges, including the divide between IT and operational technology (OT). Knickle will also share examples of the connection between IoT and digital transformation and why this connection is so important to industrial customers. Join this session to learn why industrial companies continue to invest in IoT, IoT's impact on their products and processes, and the role of IT suppliers and partners as organizations develop IoT-enabled solutions with real business impact.

2:20 pm – 3:00 pm Track Sessions

Track 1: Delivering Intelligence at the Edge with New Computing Platforms and Architectures, *Ashish Nadkarni, Program Director, Computing Platforms*

This session will provide essential guidance for vendors and buyers on how they can embrace a shift in the computing paradigm as they chart out their IT/OT infrastructure strategy to deliver intelligence at the edge. It will analyze the convergence of IT and OT, the proliferation of industry-standard systems at the edge, and the decoupling of OT and CT applications from hardware — leading to a software-defined OT revolution. The session will also assess important developments in fog computing, accelerated computing, heterogeneous computing, and composable infrastructure that will play key roles in extending compute resources to edge locations.

Track 2: Building the Enterprise Digital Platform, *Bob Parker, Group Vice President, Retail, Energy, Manufacturing, and Financial Services*

One of the impediments to digital progress at enterprises is the implementation of a comprehensive digital platform. In this session, IDC will share its research on what constitutes a digital platform and how companies will approach deployment. The presentation will also look at the critical points of differentiation that will determine which vendors will get serious consideration.

Track 3: How Do You Build a Successful Data-as-a-Service Business? *Dan Vesset, Group Vice President, Analytics and Information Management*

"The world's most valuable resource is no longer oil, but data" proclaimed the cover of the May 6, 2017, issue of *The Economist*. IDC research shows that end users are increasing investments in monetizing their data externally and in incorporating third-party data to train AI models, feed new analytic solutions, and enable a new generation of decision-centric computing. In parallel, technology vendors have started to acquire or partner with data providers to create new standalone data product or wrap data around other products and services. However, most enterprises have neither the technology nor the business expertise to bring data-as-a-service (DaaS) to market. In this session, Dan Vesset will examine trends that have led DaaS to becoming the fourth layer of the services-enabled architecture along with IaaS, PaaS, and SaaS. Recommendations from this session will help your company examine options for participating in the DaaS economy and to consider the myriad technology, pricing, partnering, and go-to-market aspects of data monetization.

Track 4: Closing the CX Overconfidence Gap: Going from Satisfied to Delighted, *Alan Webber, Research Director, Digital Strategy and Customer Experience*

Do you know how your customers experience your brand? Do you know how they feel about your brand? Great products are not enough just as creative marketing and awesome customer support may get customers in the door, but it won't keep them there. Experience is the most important thing in business, yet the difference between what companies think their customers feel and what their customers actually feel is often significantly different. This creates an overconfidence gap between where companies are and where customers want them to be, and often, the key to closing that gap is technology. Alan Webber will demonstrate how companies are deluding themselves about the experiences they deliver, what makes a great experience and who is delivering it, and how technology is the key in this ever-evolving world.

Track 5: Are You Ready for Intelligent Infrastructure in Enterprise Datacenters? *Ritu Jyoti, Research Director, Enterprise Storage, Server and Infrastructure Software*

Cognitive is poised to transform next-generation datacenters, improving productivity, managing risks, and driving overall cost reduction. This session will discuss how AI/ML will be employed by infrastructure — across the datacenter, varying from intelligent network automation to self-configurable/self-healing enterprise compute and storage, and the associated IT impact. It will also review how AI/ML will be leveraged by data services for hybrid cloud with support ranging from data location optimization and costing to cybersecurity.

Track 6: Multicloud: New Priorities in a Multicloud World, *Stephen Elliot, Program Vice President, Management Software and DevOps, and Mark Thomason, Research Director, Digital Business Models and Monetization*

As organizations undergo digital transformation and continue to increase their cloud consumption, more and more organizations are finding that a "multicloud" environment is the new norm. From IDC's *CloudView Survey*, the vast majority of cloud users are running more than one type of cloud deployment and work with more than one major cloud provider — and this new world of "multicloud" comes with new challenges and new priorities. There's a significant difference between merely adopting multiple types of cloud and having the skills and processes in place to manage a hybrid IT environment. This session will highlight best practices used to thrive in a multicloud world across operations and management, it will share data from IDC's *CloudView Survey* illustrating multicloud adoption and market progress, and it will analyze market growth, vendor tools, and pitfalls to avoid.

Track 7: Deconstructing the IoT Platform Wars, *Stacy Crook, Research Director, Internet of Things*

The Internet of Things is made up of a vast array of endpoints, connecting over a variety of networks and creating unprecedented amounts of data. Organizations are eager to harness this data for many purposes, but the ability to access and process the data at scale has proved challenging. IoT platforms can serve as a key tool in IoT application development, abstracting the complexity of connecting and managing IoT devices, as well as offering a means to integrate IoT data with existing enterprise processes. Given the central role these platforms play in IoT solution enablement, the market has become a hotbed of competitive activity. In this session, Stacy Crook will provide insight into the key trends driving IoT platform adoption and identify the top use cases that are expected to drive growth in the coming years. The session will also deep dive into the competitive landscape and outline the characteristics that will ultimately define winning strategies in this space.

3:10 pm – 3:50 pm Track Sessions

Track 1: Creating the Data Space: When Edge Is at the Core of the Business, *Rick Villars, Vice President, Datacenter and Cloud*

Success in digital transformation requires new thinking about the consumption of IT resources in increasingly "smart" edge locations. These warehouses, hospitals, airports, and even amusement parks are where augmented/virtual reality, IoT, robotics, 3D printing, and rapid image processing are delivered, and they must be optimized to deliver digital-ready experiences. This session will assess the need for highly standardized and automated hardware, infrastructure software, and applications software bundles that can be deployed in a specific location to deliver SaaS-like services with low latency, high availability, and local data governance. Focusing on the IT hardware/software bundle alone is misguided as many of these solutions will be deployed in non-datacenter "spaces" and must accommodate "bring your own network" and "bring your own facilities" approaches.

Track 2: Digital Transformation — Investing Intelligently for Outcomes: IDC's Business Use Case

Approach, *Shawn Fitzgerald, Research Director, Digital Transformation Strategies*

While direct digital transformation (DX) investments are forecast at \$6.3 trillion (2017–2020), many business and IT leaders are struggling with how to determine, prioritize, and execute these investments. Learn how digital-leading organizations are employing IDC's business use case methodology to outperform their industry and market peers. In this session, IDC will detail its use case model and framework, provide its world-class journey map methodology, and provide an overview of its approximately 500 use cases spanning over 16 industry verticals.

Track 3: How Does Decision-Centric Computing Drive Digital Transformation? *Maureen Fleming, Program Vice President, Business Process Management and Middleware*

Success of digital transformation (DX) initiatives, especially those involving intelligent automation, problem prevention, IoT, and digital commerce, requires a digital platform that can no longer rely on "big data" deployments of the past decade. Instead, enterprises leading in DX are investing in decision-centric computing that continuously receives and analyzes data to predict when decisions need to be made, systematically learns how to automate those decisions, and acts on each decision to improve performance. This style of computing is applied to normal business cycles where reacting to problems or opportunities quickly enough, within the flow of operations, produces immediate benefits — one decision at a time. By 2021, 90% of new intelligent systems will have an embedded decision-centric computing architecture that automatically detects and evaluates conditions and makes decisions about how to respond — leading to transformational outcomes. In this session, Maureen Fleming will define the decision-centric computing opportunity; will provide examples about how decision-centric computing is used to transform processes, enterprises, and markets; and will recommend a path for building your own decision-centric computing strategy.

Track 4: The New Super Powers of Conversational AI, *Mary Wardley, Program Vice President, Loyalty and Customer Care*

Artificial intelligence (AI) has rapidly caught the imaginations of organizations as the next holy grail for improving a broad number of business processes including the front line of customer experience interactions. Reductions in cost through streamlined processes and more rapid customer response times coupled with the cutting-edge attractiveness of such a futuristic technology is motivating organizations to look at chatbots and voice interactive enterprise applications. As always, working out the kinks and preparing for prime time can have costs. Can bots be left on their own? What is the appropriate bot-to-human ratio? Is it bot-assisted human or human-assisted bot? Mary Wardley will share the current state of conversational AI within service and support scenarios, use cases that have successfully incorporated conversational AI, and a road map for others considering the move.

Track 5: AI/Machine Learning: Prepare Your Computing Environment, *Peter Rutten, Research Manager, Server Solutions*

Artificial intelligence (AI)/machine learning is extremely compute intensive, especially the "training" component, the stage during which an AI system masters its knowledge base. Many businesses that have started developing AI applications find themselves renewing their infrastructure not once but twice in as few as two years. While such experimentation can be beneficial for data scientists, AI application developers, and infrastructure teams to collaborate and tackle AI's many hurdles, it is also costly and time consuming in a time when AI is becoming a competitive differentiator. This talk will cover the requirements for server infrastructure, on-premises or in the cloud, and for certain types of server acceleration (GP-GPUs, FPGAs, many-core processors, ASICs) that AI demands, so that you can help your customers get to market faster.

Track 6: Managed Cloud Services: An Industry on the Move, *David Tapper, Program Vice President, Outsourcing and Managed Cloud Services*

Enterprises are consuming a range of managed cloud services involving private, public, and hybrid options to support their transformation to digital enterprises. This is placing greater pressure on providers to make fundamental changes to their business and technology operations as they move from a noncloud to a cloud world. This session will look at market opportunities across these different buyer options along with critical buyer requirements in utilizing managed cloud services in areas such as technology environments, types of operation capabilities, automation and cognitive expectations, service integration and broker management, and resiliency capabilities. In addition, this session will provide insight into the competitive environment and the range of players that are pursuing this market. This will include highlighting critical investments providers need to make to support long-term strategic requirements. Finally, this session will provide key guidance on how service providers of all types need to position their managed cloud services to ensure optimal market penetration.

Track 7: Emerging IoT Data Security and Privacy Threats, Solutions, and Strategies, *Robert Westervelt, Research Manager, Security Products*

In this presentation, Robert Westervelt will explore the risks to IoT data and the technologies and deployment models that are emerging to ensure data security and privacy at the edge, in big data analytics environments, and in cloud repositories. The presentation will examine the threat landscape and the specific challenges enterprises encounter when addressing data security and privacy of sensor-equipped and network-enabled embedded devices. It will also review a recent IDC study that uncovered how IoT security buyers are using and evaluating a combination of innovative solutions and traditional security controls to meet IoT security and compliance requirements. Finally, Westervelt will conclude his presentation with essential guidance for vendors and buyers on the components that make up a modern data defense strategy and the data-centric defenses that support consistent, policy-driven enforcement mechanisms at the endpoint, at the edge, and in public and private cloud environments.

4:00 pm – 5:00 pm Featured Keynote



Automation and Employment: What Should (and Shouldn't) We Worry About? *David Autor, Ford Professor of Economics, Associate Head of the MIT Department of Economics, and Research Fellow, NBER, JPAL, and IZA*

Despite a century of remarkable labor-saving automation, the fraction of U.S. adults who work at a job has risen almost continuously for the past 125 years. Why hasn't automation already made our labor redundant and our skills obsolete? And is it about to do so this time? In this talk, MIT economist David Autor will address the paradox of why advancing automation has tended to raise rather than lower employment, highlighting that even as machines displace rote human activity, they complement human expertise, judgment, and creativity.