



IDC Sales and Marketing Effectiveness Summit

Best Practices in Acquiring and Retaining Customers

NEW YORK MARRIOTT EAST SIDE HOTEL, NEW YORK, NY • APRIL 16, 2007

LEARN FROM EXPERTS AND YOUR PEERS FROM THESE ORGANIZATIONS:

AT&T, Avnet, Cardinal Health, Cisco Systems,
Dow Corning Corporation, FedEx, IDC,
JPMorgan Chase, Kodak, LogLogic, SAVO Group,
Siemens Medical Solutions, Xerox and more!



www.idc.com/smesummit07

EXCITING NEW CONTENT WILL ENSURE THAT YOU LEARN HOW TO:

- > Create a common mission between Marketing and Sales
- > Identify and serve your most promising prospects and customers for greatest ROI
- > Create a consistent customer experience and drive customer-centric thinking throughout the organization
- > Integrate the sales process and pipeline with the core marketing process thus accelerating sales and improving close rates
- > Enable your sales organization to clearly articulate the value and differentiation of your product or solution
- > Utilize Business Intelligence to improve sales performance
- > Effectively use new tools and techniques for Marketing Operations, Planning and Measurement

IDC Sales and Marketing Effectiveness Summit

Best Practices in Acquiring and Retaining Customers

The B2B sales and marketing functions can improve process and productivity through better alignment in goals, planning, budgeting and execution. This one-day interactive summit provides best practice case studies from leading executives on how to prioritize and address these issues. The summit explores the emerging tools and techniques successful organizations are implementing to increase marketing and sales productivity.



AGENDA, APRIL 16, 2007

7:30 am – 8:30 am

Registration, Continental Breakfast and Tabletop Exhibit Viewing

8:30 am – 9:00 am

Welcome and Opening Remarks from Conference Co-Chair

Rich Vancil, Vice President, CMO Advisory Practice, IDC

Sales and marketing leaders are seeking to better coordinate the complex and expensive processes that link marketing and sales. These include improved techniques for the lead generation and lead management process, development of new "closed-loop" metrics that tie marketing activity to sales results and the deployment of information tools that are adopted and shared by the sales and marketing teams. This session will present IDC's latest observations and insights on how B2B marketing and sales professionals are seeing productivity gains at the intersection of sales and marketing.

9:00 am – 9:45 am

Aligning Marketing and Sales to Create a Superior Customer Experience

Mike MacDonald, President, Global Accounts & Marketing Operations, Xerox

This presentation will examine the common ground between marketing and sales strategies, focusing on the power of alignment. When "big brand" initiatives are reflected in "little brand" interactions, the results can be powerful. Mr. MacDonald will delve into the shared mission and inter-dependencies of creating a superior customer experience around the world.

9:45 am – 10:15 am

Networking Break, Tabletop Exhibit Viewing and One-to-One Meetings

Who Should Attend?

B2B Senior Sales and Marketing Executives in charge of:

- Brand Strategy
- Business Development
- Corporate Marketing
- Field/Events Marketing
- Marketing Communications
- Marketing Operations
- Product Marketing
- Sales Management

TAKE ADVANTAGE OF THE ONE-TO-ONE OPPORTUNITY ONSITE

Attendees have the opportunity to sign up for complimentary one-to-one meetings with select analysts and industry experts at event registration. This will enable you to gain strategic advice on your company's sales and marketing initiatives. Arrive early since meetings are scheduled on a first-come, first-served basis. Some of the analysts who will be available for meetings are:

Rich Vancil, Vice President, CMO Advisory Practice, IDC

Lee Levitt, Research Director, Sales Executive Practice, IDC

Michael Gerard, Director, CMO Advisory Practice, IDC

Clare Gillan, Group Vice President Executive Advisory Group and Go-to-Market Services, IDC

10:15 am – 11:00 am

Increase Revenue and Measure ROI with Effective Lead Management

Michael Gee, *Marketing Process Leader, Dow Corning Corporation*

Effective lead management is a critical part of a marketing measurement framework. It requires cross-functional teamwork, common definitions, intuitive systems and pipeline visibility. Dow Corning has implemented a global web-based lead management engine to qualify, cultivate and track leads sent to direct and indirect sellers in multiple languages. This session shares experiences from a global B2B context. Learn to: Integrate lead management into a marketing metrics framework; Design lead processes for direct and indirect channels; Leverage technology to track and manage leads.

11:00 am – 11:45 am

Bridging the Sales and Marketing Gap

Bappa Choudhury, *Vice President of Segment Management, Global Solutions, Siemens Medical Solutions*

The chasm between marketing and sales organizations has existed for years and continues to be a challenge. Now more than ever, with the speed and complexity of today's marketplace, the need to bridge the gap is crucial to enabling profitable revenue growth. The key to successful alignment is to institute a uniform process and language that encompasses the sales and the marketing organizations into one closed loop of communication, measurement and follow-through. Gain invaluable insights into how aligning marketing and sales through this unique approach will translate your marketing strategy into sales results.

11:45 am – 1:00 pm

Lunch, Facilitated Roundtable Discussions, One-to-One Meetings

During lunch, the roundtable discussions will provide attendees the opportunity to interact with peers, speakers and subject matter experts on key topics in an interactive format – with the discussion led by an industry expert. Attendee participation is strongly encouraged. Sign up sheets will be available at registration on a first-come, first-served basis. The following are some of the roundtables available at the Summit:

Marketing Dashboard Development

Michael Gerard, *Director, CMO Advisory Practice, IDC*

Delivering a Rich Customer Experience for the "I Decide, Not You" Generation of Buyers

Clare Gillan, *Group Vice President Executive Advisory Group and Go-to-Market Services, IDC*

Ball of Confusion: Achieving Success in Global Selling

Donald Best, *Senior Vice President, WW Sales and Marketing, IDC*

1:00 pm – 1:45 pm

CONCURRENT SESSIONS

Group 1: Marketing Marketing Analytics

IDC research has consistently shown that the best performing marketers are those who make significant use of business intelligence and analytic applications. These marketers are distinguished by their ability to bring the "Voice of the Customer" inside their organization. Through better listening and analysis of many types of customer data, these marketers are better able to act on what they are hearing from the customer base. This session will explore the "people, process, and technology" of marketing leaders who are making most effective use of BI and analytics.

Group 2: Sales

The Critical Mission for 2007: Sales Enablement

John Aiello, *Co-Founder and CEO, SAVO Group*

Recent studies indicate that 85% of a company's brand image is driven by the direct interaction between the salesperson and the buyer. This reality, combined with the need to prove direct impact on revenue growth, is causing a radical shift in the focus of all organizations. Marketers are maniacally focusing on aligning their solutions, value propositions and differentiators with specific selling situations. Once aligned, the sales organization must be "enabled" to deliver these messages in clear, consistent, and compelling ways. In this session a SAVO client will highlight leading practices and success factors in deploying Sales Enablement solutions across their organization.

1:45 pm – 2:30 pm

CONCURRENT SESSIONS

Group 1: Marketing Strategic Marketing Framework: Integrating Sales & Marketing

Nam Vo, *VP Marketing, Cardinal Health*

In today's dynamic, fast paced environment and competitive landscape, the need of integration between sales and marketing is even more critical in order to compete and succeed. There are fundamental best practices that stand the test of time and having a proven Strategic Marketing Framework will help to guide the business in the right direction. Marketing is about strategy and innovation - two of the most important characteristics of a proactive, flexible organization. In this session attendees will learn about the experience Cardinal Health, Inc., an \$82 billion dollar healthcare solutions provider, had in deploying a Strategic Marketing Framework.

Group 2: Sales

Panel Discussion: Best Practices in

Account Planning

Moderator: Lee Levitt, *Research Director, Sales Executive Practice, IDC and Conference Co-Chair*
Pat Elizondo, *Senior Vice President, Industry & Major Accounts Operations, Xerox*
Leslie Canning, *Director of Operations, US Enterprise Sales, Cisco*

Account planning is one of the key strategic sales activities that drive revenue, customer satisfaction and long term customer loyalty. In this session senior sales executives from Cisco, Xerox and others will discuss key issues and best practices in account planning. Attendees will learn the three most important components of any successful account plan and discover the most common pitfalls to avoid.

2:30 pm – 3:15 pm

CONCURRENT SESSIONS

Group 1: Marketing

Panel Discussion: Customer

Segmentation: Identifying and Serving Your Most Promising Prospects & Customers for Greatest ROI

Moderator: Rich Vancil, *Vice President, CMO Advisory Practice, IDC*

Jeff Hayzlett, *CMO & VP, Kodak's Graphic Communications Group*

Alicia Dietsch, *VP, Business Segment Marketing, AT&T*

Eileen Zicchino, *Treasury & Securities Services Global Marketing, Chief Marketing Officer, JPMorgan Chase*

Today's marketers are challenged to effectively reach their target audiences with the right message and the right media at the right time! This session will empower you to speak to your segmented customer base in new ways. Attendees will hear how Kodak's Graphic Communications Group leveraged rich customer

information to create customized and personalized messages in their cross media campaigns to drive significant ROI; how AT&T is measuring the impact of their customer programs to drive value for individual customer segments; and how JPMorgan Chase is leveraging consumer marketing techniques in the B2B space.

Group 2: Sales

Implementing Business Intelligence to Improve Sales Performance

Steve Phillips, *Senior Vice President & CIO, Avnet*

Effective business intelligence (BI) systems can improve sales performance, transform business processes, and enhance customer relationships. Avnet, Inc., a \$14 billion global technology distributor, developed such a BI system which has become an integral part of the daily routine of more than 2000 Avnet salespeople. This session will feature representatives from Avnet's IT and business teams who will explore best practices for developing a sales-friendly BI system. Attendees will gain a deeper understanding on how to implement an effective BI system by focusing on business alignment, users' perspectives, data relevancy, company culture, executive sponsorship, and training.

3:15 pm – 3:45 pm

Networking Break, Tablet Exhibit Viewing and One-to-One Analyst Meetings

3:45 pm – 4:30 pm

Crossing the Marketing to Sales Chasm: Rethinking Pipeline Dynamics

Andy Lark, *CMO, LogLogic*

Many companies are struggling with how to integrate the sales process and pipeline with the core marketing process to accelerate sales and improve close rates. Fortunately, the wide spread adoption of CRM systems has created a real opportunity for the first time to line-up the

marketing and sales engines. This session will provide attendees with tips and techniques for getting more from your CRM deployment, accelerating leads through the pipeline, bringing accountability to lead generation and deploying new participatory platforms from blogs to wikis to podcasts to improve the nurturing of prospects.

4:30 pm – 5:15 pm

How FedEx Cultivates A Passion for Leadership Excellence

Dave Kevern, *VP Worldwide Services, FedEx*

Recognized by FORTUNE magazine as one of the world's "Most Admired Companies" and "One of the 100 Best Companies to Work for in America," FedEx is committed to being a market leader in providing the absolute best customer experience. Thus, every day it faces the challenge of creating a culture where individual leadership drives market leadership. In this session attendees will hear how FedEx succeeds by cultivating engaged sales and marketing leaders who inspire a passion for excellence throughout a large and diverse workforce.

5:15 pm – 5:45 pm

Conference Conclusions and Closing Remarks from Conference Co-Chairmen

Rich Vancil, *Vice President, CMO Advisory Practice, IDC*

Lee Levitt, *Research Director, Sales Executive Practice, IDC*

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Registration Information

Registration Rates

Sign up by March 20 and save \$200!
\$695

Standard Registration Rate: After March 20, 2007
\$895

Group Discount

A \$100 discount per person is available for groups of three or more people from the same company registering together. We ask that all forms be submitted together and paid in full at time of registration.

Two Easy Ways to Register:

1. Online:

Visit www.idc.com/smesummit07

2. By phone:

Call 800-605-5849 or 978-597-0133.

What Your Registration Includes

- Admission to sessions
- Continental breakfast, lunch, and coffee breaks
- Access to presentations online*

** Printed proceedings will not be available at the Summit. Three days after the Summit, the presentations submitted to IDC will be available to attendees via www.idc.com.*

- IDC reserves the right to alter this program without notification.

Venue

New York Marriott East Side
525 Lexington Avenue
New York, New York 10017
Reservations: 1-800-228-9290

Hotel Reservations

If you require hotel reservations, we have reserved a limited number of rooms at the New York Marriott East Side. A special rate of \$259 will be offered until March 16, 2007. To receive this rate, please call 1-800-228-9290 and identify yourself as an attendee of the IDC Sales and Marketing Effectiveness Summit.

Payment

Registrations must be accompanied by full payment. You may pay by credit card (American Express, Visa, or MasterCard) or check, payable to IDC US Conference Group.

Cancellation Policy

Substitutions may be made any time by faxing a written request to 978-597-2395. Cancellations communicated to IDC by April 3, 2007, are subject to a \$150 processing fee. Registrants who either cancel after April 3, 2007, or do not attend the conference are liable for the full registration fee.

Special Needs

IDC fully supports the Americans with Disabilities Act. If you require special assistance of any kind, please call us at 800-605-5849 or 978-597-0133.

About IDC

IDC is the premier global market intelligence and advisory firm in the information technology and telecommunications industries. We analyze and predict technology trends so that our clients can make strategic, fact-based decisions on IT business strategy. IDC Forums are designed to provide the latest news, research, and benchmarking case studies on relevant and highly-focused topics, offering enterprise decision makers insight into how they can strategically use technology to gain competitive advantage. Case study presentations are featured at each conference providing the highest quality program content. IDC Forums offer important opportunities for attendees to network with peers and to discuss the challenges and solutions faced in the real-world.



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