



# COMPETITIVE MARKETING S U M M I T




# AGENDA

Denver Marriott West - Golden, CO,

October 23-24, 2018

**The #1 competitive intelligence conference dedicated to the high tech industry.**







## TUESDAY, OCTOBER 23

TIME	EVENT	DESCRIPTION
7:00 AM to 7:45 AM	<b>Breakfast and Registration</b>	
7:45 AM to 8:00 AM	<b>Welcome and Opening Remarks</b>	A long time in the making, the Competitive Marketing Summit is the only B2B marketing conference focused <u>exclusively</u> on empowering high-tech product marketing and product management professionals by leveraging their competitive intelligence efforts and delivering improved sales enablement results.
8:00 AM to 9:10 AM	<b>Keynote:</b> <b>“The Chasm” Revisited</b>  <b>Michael Eckhardt</b> Managing Director, Chasm Institute	<p>Michael Eckhardt is a Managing Director &amp; Senior Program Leader at Chasm Institute. He is a veteran of PwC, Harbridge Consulting, HP, and Pepsico.</p> <p>An MBA graduate of Harvard Business School and Wall Street Journal Award winner, Eckhardt is a recognized expert in leading one-day/two-day market strategy workshops aimed at this specific client outcome: achieving competitive advantage and growth for their tech-based products and services in the next 12-36 months.</p> <p>Michael provides tech-based clients in the U.S., Europe, &amp; Asia Pacific with workshops/tools/training to gain and sustain leadership positions in highly competitive markets. His three primary areas of focus are:</p> <p>(1) target market strategy, (2) achieving sustainable competitive advantage, (3) and driving successful product launches.</p> <p>Clients include Adobe, Google/Nest, Citrix, NetApp, RSI, HotChalk, Intel, Autodesk, SAP, Plantronics, Agilent Life Sciences, Jive Software, QAD, Siemens/Mentor Graphics, RSI, Philips Medical, and many other tech-based businesses, from large enterprises to mid-sized companies to venture-backed start-ups.</p>
9:10 AM to 9:30 AM	<b>Break</b>	Opportunity to interact with our expo sponsors, network and enjoy refreshments
9:30 AM to 10:30 AM	<b>Session 1:</b> <b>Digital Intelligence</b>  <b>Andreas Mueller</b> Co-founder, Bloofusion	<p>Grasping your competitors' intent requires that you immerse yourself into their digital marketing efforts. Harnessing existing data through digital tools helps a company create a picture of your competitive ecosystem. Dig deep and find out what is really taking place behind the public screen of your rivals' online presence.</p> <p>Takeaways:</p> <p>Never look at competitors the same way again. Using specific examples, you will learn how peek behind the curtain</p> <ul style="list-style-type: none"> <li>• How a company's stated competitors are not always the same as a search engines' results.</li> <li>• Learn what digital tools to use that provide insight to your hypothetical CI questions:</li> <li>• Uncover historical trends: What was their product offering one year ago? Which solutions did they feature five years ago, before the acquisition?</li> <li>• Chart of 15 free and paid tools that one can use that cover six categories: 1) Rankings, 2) Advertising, 3) Authority, 4) Social Media, 5) Traffic, 6) and Technographics.</li> <li>• Expose current focuses: Which marketing automation systems are they using? Where is their social media focus? Which sensitive or revealing questions are being asked about them?</li> <li>• Monitor future directions: What is their content strategy? Why are they ramping up their video channel and e-books?</li> </ul> <p>Andreas' mantra: <i>“Your stated competitors are often different than what appears in search engine results.”</i></p>
10:30 AM to 11:15 AM	<b>Session 2:</b> <b>Leadership Beyond the ‘Quadrant’</b>  <b>Carter Lusher</b> Director, Industry Analyst Relations, Informatica	<p>While IT industry analysts are noted for their signature deliverables like the Gartner Magic Quadrant, The Forrester Wave™ and Ovum Decision Matrix in reality their influence goes way beyond the “quadrant” on a 2x2 graphic.</p> <p>In this speech, both sides of the coin will be addressed: influencing the analysts and leveraging analyst insights to achieve competitive advantage. In fact, to be effective in the influence game, vendors must turn what is often a monolog of talking AT the analysts into a dialog WITH the analysts.</p> <p>You will learn:</p> <ul style="list-style-type: none"> <li>• How is the analyst landscape evolving in the age of limitless free information, social media, review sites, and machine learning?</li> <li>• What are key characteristics of an effective outreach program to ensure that the vendor is leveraging the unique position of the analysts to drive top-line results?</li> <li>• How can analyst advice and research be used to improved decision making... and be part of the influence game?</li> <li>• What is role that analyst research can be used to support marketing and sales?</li> </ul> <p>Speaker: Carter Lusher is long-time player in the analyst game: IT manager end-user client, Research Fellow at Gartner and Ovum, co-founder of analyst-of-the-analysts firm SageCircle, and AR professional. He tweets at @CarterLusher and can be found on LinkedIn at in/CarterLusher.</p>

TUES, Oct. 23









# TUESDAY, OCTOBER 23 *(continued)*

TUES, Oct. 23

TIME	EVENT	DESCRIPTION
11:15 AM to 12:00 PM	<p><b>Session 3: Influencer &amp; Practitioner Communities</b></p>   <p><b>John Mark Troyer</b> Co-CEO, Influence Marketing Council</p> <p><b>Kathleen Troyer</b> Co-CEO, Influence Marketing Council</p>	<p>Branding is what a company does, brand is what others say about you. Influencers, advocates, developer advocates, customer advocates, and practitioner communities are some of today's roles that can be a powerful force for marketers to increase brand affinity, brand advocacy, and uncover market insights through this listening post. Peers and technical experts are becoming increasingly influential in the purchasing process over corporate messaging. Communities of practice have always grown around professional domains - professionals coming together to learn and succeed. Online social platforms have supercharged the ability of these communities of technologists to come together around your product or solution, and of individuals to have increased influence. By participating in these communities, online and off, and by connecting with individual influencers, competitive marketing professionals can create deep relationships and experiences that can change "what everybody's saying" about your company.</p> <p>You will learn:</p> <ul style="list-style-type: none"> <li>• How to build your industry ecosystem, and influence through relationships</li> <li>• Amplification of your message through this influencers</li> <li>• Using the newly created Influence Program Canvas to help define an influencer program</li> </ul> <p>Takeaways: Influence Program Canvas</p>
12:00 PM to 1:00 PM	<b>Lunch</b>	Enjoy lunch at a table with a subject matter expert & your peers while discussing a topic of interest highlighted at the Summit
1:00 PM to 1:45 PM	<p><b>Session 4: Innovation Thinking for Intelligence</b></p>   <p><b>Bruce Montgomery</b> President, ExperienceYes</p> <p><b>Gail Montgomery</b> CEO, ExperienceYes</p>	<p>The Yes, And... Principle</p> <p>As the approach to competitive marketing and intelligence continues to evolve, the field of creative thinking and problem solving has done the same. The drive for a new idea or a new method of looking at a challenging situation is at the heart of all innovation. Engage with these two dynamic speakers as they take you through the "Yes, And... Principle", one of the most unique and powerful methods to getting individuals, teams and organizations to step up and solve problems. Steeped in the world of improv comedy, this highly experiential approach sheds light into the neuroscience behind creativity and truly "out-of-the-box" thinking.</p>
1:45 PM to 2:30 PM	<p><b>Session 5: Product Lifecycle Intelligence</b></p>  <p><b>Wayne Greene</b> VP of Marketing, RigD</p>	<p>Product management expert Wayne Greene will articulate an often missing part of competitive - how product management uses competitive intelligence in influencing product direction.</p> <p>This session will highlight:</p> <ul style="list-style-type: none"> <li>How CI is used in the different phases of the product lifecycle</li> <li>How to avoid getting lost in the product-feature gap analysis trap</li> <li>How competitive information should be used in product roadmaps, and which ones</li> <li>How product strategy uses competitive information</li> </ul>
2:30 PM to 3:00 PM	<p><b>Session 6: Pricing Decoded</b></p>  <p><b>Sagar Thakur</b> Senior Manager, Pricing, Packing and GTM, OS/soft</p>	<p>Are you maximizing your revenue share, profitability, or market share? Poor goal setting with pricing leads to chaos.</p> <p>In this session, you will learn how:</p> <ul style="list-style-type: none"> <li>• Isolating the pricing problem is key and the red herrings to watch out for (e.g. value articulation, sales behaviors, or simply a bad product-market fit) that is not tied to a pricing problem.</li> <li>• When the pricing element is identified as a root-cause problem, scope the problem to: packaging, licensing metric, price setting, policies or a combination of all.</li> <li>• Why the licensing metric deserves the most attention, and finding the one key metric that most closely scales with value.</li> <li>• Study the contextual elements that impact pricing: psychology, recent buyer purchases, and category facts are some examples.</li> <li>• Use soft skills to drive organizational alignment with regards to pricing.</li> </ul>
3:00 PM to 3:30 PM	<b>Break</b>	Opportunity to interact with our expo sponsors, network and enjoy refreshments
3:30 PM to 4:15 PM	<p><b>Session 7: Product Launch &amp; GTM</b></p>  <p><b>David Daniels</b> VP, Customer Success, Pragmatic Marketing</p>	<p>Is your product launch doomed? According to statistics, 35-80% of launches fail. Ignoring or discounting the competition when planning a product launch contributes to this casualty. Pragmatic Marketing's Dave Daniels will share a few ideas on how to build a strategy to launch a product into a highly competitive product category. After decades of launching products and studying product launches, Daniels has identified examples of companies that launched products into crowded product categories. And despite conventional wisdom that pointed to an abysmal failure, the product launches still succeeded.</p> <p>You'll Learn:</p> <ul style="list-style-type: none"> <li>• Unveil the new Pragmatic Marketing Framework, and the responsibilities answering the age old questions: Is it product marketing or product management?</li> <li>• How can you launch a product into a highly competitive product category and survive?</li> <li>• Seven metrics every product marketing manager should know</li> </ul>
5:00 PM to 6:30 PM	<b>Evening Networking and Cocktails</b>	Enjoy light appetizers and refreshments while networking after the Day 1 of the Competitive Marketing Summit




# WEDNESDAY, OCTOBER 24

Wed, Oct. 24

TIME	EVENT	DESCRIPTION
7:15 AM to 8:00 AM	<b>Breakfast and Registration</b>	
8:00 AM to 8:15 AM	<b>Recap and Day 2 Highlights</b>	
8:15 AM to 9:15 AM	<b>Keynote: Competitive Messaging</b>  <b>Ken Rutsky</b> Strategist & Author, KJR Associates	Today's B2B markets are conversations; however, these conversations are often loud, confusing, and colorful. Breaking through and beating competition has less to do with your volume and more to do with your understanding of the market conversation and the most effective ways to influencing not just the content, but the context of your markets. <p>This presentation will draw on both classic and leading edge thinking about storytelling, influence, and competition in B2B markets and takes you on a journey from the grand bazaars of antiquity to the highly competitive B2B markets of today. Ken's keynote will leave you both inspired and informed on how to begin to apply these concepts to your messages and methods, tilting the market in your favor, and making competition irrelevant.</p> Ken's mantra: "Tilt the playing field and make the competition irrelevant."
9:15 AM to 9:45 AM	<b>Break</b>	Opportunity to interact with our expo sponsors, network and enjoy refreshments
9:45 AM to 10:30 AM	<b>Session 8: Product Teardowns</b>  <b>Curtis Gunderson</b> Sr. Product Marketing Engineer, VMware	Making the best use of your time and budget to best serve your business is always a challenge. In this session you will learn from the subject matter experts on how to both prioritize and create a strategy for competitive product teardowns. Whether it's dissecting a product from a YouTube video, a trade show, or an in-depth lab analysis, we will explore the pros and cons of each as well as how each aligns with a business priority. Be prepared to learn best practice techniques, budget friendly options and creative approaches!
10:30 AM to 11:15 AM	<b>Session 9: Win/loss analysis</b>  <b>Clara Smyth</b> Competitive Intelligence Analyst, NetSuite  <b>Ellen Naylor</b> CEO, The Business Intelligence Source  <b>Richard Case</b> Industry Analyst, Aberdeen	Win/loss customer analysis uncovers the reasons prospects chose your company's products and services over a competitor's solutions. Incorporating these practices will help a company understand, "Why do we win when we win and lose when we lose." <p>This session covers:</p> <ul style="list-style-type: none"> <li>• Why do win/loss interviews</li> <li>• Types of interviews: Blind versus non-blind</li> <li>• Finding customers or prospects to interview</li> <li>• Creating the questionnaire</li> <li>• Transcripts and key customer comments</li> <li>• Summarizing many interviews: Wizard Chart</li> <li>• Prioritizing Action: Battle Plan</li> <li>• Particular actions one can take</li> <li>• Real life win/loss example</li> </ul> TAKEAWAYS: <ul style="list-style-type: none"> <li>• Sample questionnaire</li> <li>• Actual win/loss interview transcription</li> </ul> THE PANEL <p>Now that you understand the power of win/loss analysis, this panel will discuss and share their experiences while answering some pointed questions on the complexities of win/loss.</p> Moderator: TBD
11:15 AM to 12:00 PM	<b>Session 10: The 5 Secrets of Battlecards</b>  <b>Jay Nakagawa</b> Director, Competitive Intelligence, Dell EMC	We all know the purpose of battlecards. Win/loss rates are trending downwards, and the competitive team is under pressure to produce ammunition for some quick wins. Sales detests them, and sales management has lost confidence in using them as competitive intelligence tool because they're old, uninspiring, stale, and outdated. Certainly there has to be a better way!! <p>This session will focus on how to beat the battlecard challenge; even if you're the only person in the company doing them!</p> With Dell EMC consistently averaging a win rate in excess of 85% over the past five years, Jay will reveal how his group managed to overcome the traditional challenges with battlecard creation. <p>Key takeaway: "Battlecards are the lifeblood of sales engaged in combat with the competition. When done right, it enables and enhances sales' ability to win deals. When done wrong, it leads to a loss of trust in the information provided and damages the credibility of CI as seen in increased losses."</p>
12:00 PM to 1:00 PM	<b>Lunch</b>	Enjoy lunch at a table with a subject matter expert & your peers while discussing a topic of interest highlighted at the Summit
1:00 PM to 1:45 PM	<b>Session 11: Competitive Marketing Programs</b>  <b>Clara Smyth</b> Competitive Intelligence Analyst, NetSuite	Collecting and aggregating competitive information is often overlooked when designing public, customer facing content. Compelling marketing programs should be designed to best serve your organization, as well as understand where to expect the best ROI. NetSuite's Clara Smyth is not only a competitive intelligence expert, but has a unique twist with her <b>her</b> career starting in the marketing communications department. <p>You'll learn:</p> <ul style="list-style-type: none"> <li>• The nuances between internal facing sales material, conventional content, and competitive content</li> <li>• How to transform conventional content into competitive content</li> <li>• The seven different types of marketing programs, and where competitive replacement programs fit</li> </ul>
1:45 PM to 2:15 PM	<b>Session 12: Competitive Workflows</b>  <b>Jay Goodman</b> Product Manager, Competitive Intelligence Lead, McAfee	Conducting competitive intelligence can be a difficult path to follow for CI professionals. The speaker will walk the audience through the complete competitive intelligence workflow from start to finish. The session will cover how McAfee identifies competitors for analysis, an overview on procurement of competitor products, and a tour of the teardown process. The speaker will provide recommendations and best practices for legal considerations, generating a repeatable teardown process, and the most effective ways to disseminate that data across your organization.

# WEDNESDAY, OCTOBER 24 *(continued)*

Wed, Oct. 24

TIME	EVENT	DESCRIPTION
2:15 PM to 2:45 PM	<b>Break</b>	Opportunity to interact with our expo sponsors, network and enjoy refreshments
2:45 PM to 3:15 PM	<b>Session 13: Competitive Intelligence Stacks</b> <div style="display: flex; justify-content: space-around; align-items: center;"> <div style="text-align: center;">   <b>Jay Goodman</b>                      Product Manager,                      Competitive                      Intelligence Lead,                      McAfee                 </div> <div style="text-align: center;">   <b>Jay Nakagawa</b>                      Director, Competitive                      Intelligence, Dell EMC                 </div> </div>	Join us for panelists presenting the software and applications that they use for better informed and actionable decisions.
3:15 PM to 4:00 PM	<b>Session 14: Scaling the Competitive Function</b> <div style="display: flex; justify-content: space-around; align-items: center;"> <div style="text-align: center;">   <b>Ben Scheerer</b>                      Product Marketing Manager,                      Competitive Marketing,                      VMware                 </div> </div>	Competitive marketing can take on many forms in various entities and sizes. Making the most of what you have can make the difference of an effective competitive marketing practice to a lackluster offering. Learn insights and techniques from making your budgets stretch to finding those hidden budget opportunities and making the most of them to build a world-class practice. <p>You will learn:</p> <ul style="list-style-type: none"> <li>• How to throttle resources behind a competitive practice from a start-up to enterprise</li> <li>• Assembling your competitive marketing team</li> <li>• Techniques for communicating to the business and learning how they want their intelligence delivered.</li> <li>• The do's and don'ts of trip and tradeshow reports</li> <li>• Creating compelling collateral in a setting of tight and "use it or lose it" scenarios</li> <li>• Measuring competitive intelligence ROI; metrics that justify competitive's existence</li> </ul> Handouts: <ul style="list-style-type: none"> <li>• Executive Competitive Dashboard Template</li> <li>• Trade Show Template</li> </ul>
4:00 PM to 4:15 PM	<b>Closing Remarks</b>	Achieving competitive change

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