

## Strategy, Planning and Budgeting (SPB) Readiness Calculator Results

### Information

### Information **MANAGED** Level Description

Using searchable digital portal technologies, the ability to gather and share external market factors, macro influences and competitor insights that impact strategy are critical keys to success which enable teams to quickly compare goal results against the larger plan.

Based on your answers, your company falls into the Managed category. See if the characteristics below sound like your company and our recommendations for achieving full optimization.

### Does this sound like you?

- ✓ External market factors, macro influences and competitor insights are periodically evaluated and reconciled to strategies.
- ✓ Findings may be shared with SPB participants during SPB execution and evaluated against SPB change signals and conditions to determine if change is needed.
- ✓ Goal results are periodically calculated and compared to plan.
- ✓ General SPB data is captured from SPB systems but data set extensibility and enrichment is limited and field level versioning and tracking may not exist.
- ✓ SPB information is centrally accessible but accuracy and timeliness may be in question.
- ✓ SPB information often includes input from Sales, Product, Marketing, other business units and third-party agencies.

AdHoc

Basic

Managed

**Optimized**

*40% of CMOs expect budget cuts greater than 15% in 2020  
– Gartner April 2020*

Consider the following activities to achieve an **OPTIMIZED** maturity level:

### BUSINESS RECOMMENDATIONS

- Establish ongoing research and competitor analysis work management and portal capabilities.
- Continually evaluate internal and external factors and how they impact strategy and automatically initiate notifications and change management activities.
- Publish research and learning plan findings to strategy, planning and budgeting participants and stakeholders based on their preferences and interests.
- Automatically monitor pre-defined strategy change signals.
- Extend and augment strategy, planning and budgeting information to include unique business area information and 3rd party data.
- Provide a strategy, planning and budgeting information portal that controls access and use of strategy, planning and budgeting information.

### TECHNOLOGY RECOMMENDATIONS

- Build an Internal, Searchable strategy, planning and budgeting portal
- Extract, transform and load strategy, planning and budgeting extracts into IDW tools



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