

Information**Information ADHOC 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 AdHoc category. See if the characteristics below sound like your company.

Does this sound like you?

- | | | | | |
|--|--|------------------------------------|--|--|
| ✓ External market factors, macro influences and competitor insights are rarely evaluated and reconciled to strategies. | ✓ Depth and accuracy of external findings may be in question or unknown to SPB participants. | ✓ SPB change signals do not exist. | ✓ Goal results may be calculated but are not reconciled to plan. | ✓ General SPB data is not captured from SPB systems and documents and only exists in source documents. |
| ✓ SPB information is not centrally accessible. | ✓ SPB information rarely 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 a **BASIC** maturity level:

BUSINESS RECOMMENDATIONS

- Establish learning plans and research capability.
- Establish market and competitor optics (e.g. Forrester, Gartner).
- Conduct periodic review of internal and external insights and consider strategy implications.
- Share insights with strategy, planning and budgeting stakeholders and solicit input.
- Mine strategy, planning and budgeting information from document sources and organizations and load it into a data lake.
- Begin calculating strategy, planning and budgeting performance results that align to strategy goals, measure and metrics.

TECHNOLOGY RECOMMENDATIONS

- Extract and aggregate strategy, planning and budgeting information from document sources using Workfront Fusion, Workato or CapabilitySource Connect



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