

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

### Information

### Information **BASIC** 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 Basic category. See if the characteristics below sound like your company and our recommendations for unlocking your next maturity level.

### Does this sound like you?

✓ External market factors, macro influences and competitor insights are occasionally evaluated and reconciled to strategies.	✓ Depth and accuracy of external findings may be in question.	✓ Findings may be shared with SPB participants periodically but are not considered inputs to the SPB process.	✓ SPB change signals do not exist or rarely invoke SPB changes.	✓ Goal results may be calculated but are rarely reconciled to plan.
✓ General SPB data is captured from SPB systems and documents but the data set is basic and versioning is absent.	✓ SPB information is centrally accessible but linking data relationships and quality are poor.	✓ SPB information may include 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 **MANAGED** maturity level:

### BUSINESS RECOMMENDATIONS

- Establish ongoing research and competitor analysis function. Continually evaluate internal and external factors and how they impact strategy.
- Publish research and learning plan findings to strategy, planning and budgeting participants and stakeholders.
- Monitor pre-defined strategy change signals.
- Mine strategy, planning and budgeting information from specialty strategy, goal, scenario, plan and work management systems and load it into a data lake.
- Routinely and accurately calculate strategy, planning and budgeting performance results that align to strategy goals, measure and metrics and share this information with strategy, planning and budgeting participants and stakeholders.

### TECHNOLOGY RECOMMENDATIONS

- Extract Integrated strategy, planning and budgeting Information from systems with Workfront Fusion, Workato or CapabilitySource Connect
- Generate strategy, planning and budgeting analytics and insights using BI tools
- Audit, archive and attest to strategy, planning and budgeting data using BI tools
- Benchmark to historical performance using BI tools



*Supercharge your marketing digital transformation. Schedule time with a  
CapabilitySource SPB Specialist to improve your readiness.*