

People**People MANAGED Level Description**

Modern strategy, planning and budgeting capabilities depend on an efficient process, advanced technology, and integrated information; however, it is the people who create strategies, plans, and budgets that matter most. Contributors must understand their roles and responsibilities. They must have the knowledge, ability, and desire to craft innovative strategies and the commitment to execute them.

Based on your responses in the SPB Calculator, your organization has a Managed level of readiness. This level may be described using the characteristics below.

Does this sound like you?

✓ SPB participant roles and responsibilities are defined.	✓ Levels of SPB responsibility and participation have been communicated.	✓ Internal and external contributors to SPB know what is expected of them but may not understand exactly what to do and when.	✓ The overall SPB process is defined.	✓ Creative strategies and non-traditional ideas are welcomed and may be considered.
✓ Reward systems generally encourage SPB participation, timely completion, cross-team cooperation and overall quality.	✓ SPB contributors willingly participate in SPB activities.	✓ SPB participants believe that they have a voice and that they can impact the SPB outcomes.		

Ad Hoc

Basic

Managed

Optimized

47% of surveyed marketing leaders indicated that one of their top three most urgent 2020-21 problems is a mismatch between marketing staff skillsets and emerging capability needs.
- Gartner, January 2020

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

BUSINESS RECOMMENDATIONS

- Augment strategy, planning and budgeting roles and responsibilities in work management systems with effort estimates and standard operating procedures.
- Create formal, role-based strategy, planning and budgeting education curriculum and require completion by strategy, planning and budgeting participants.
- Set strategy, planning and budgeting effort level and timing expectations and reinforce them in strategy, planning and budgeting digital work management systems.
- Fold level 3 and 4 process into digital work management systems and include strategy, planning and budgeting activities throughout the organization.
- Recognize and reward contributions to the strategy ideation portal and encourage participation throughout the organization and from partners by fairly considering all ideas internal and external.
- Survey strategy, planning and budgeting participants for experience, and conduct strategy, planning and budgeting participant peer reviews.

TECHNOLOGY RECOMMENDATIONS

- Build an internal, searchable strategy, planning and budgeting knowledge management portal.
- Develop strategy, planning and budgeting training and publish it in Adobe AEM.



Map your path to nimble, agile strategy.
Meet with a CapabilitySource SPB Specialist today.