Technology

Technology AD HOC Level Description

Although many modern marketing technologies exist, few technologies provide modern strategy development, planning and budgeting functionality. Those that do tend to be siloed and poorly integrated. Where technologies fall short, participants often augment with spreadsheets and PowerPoints. Fortunately, leading MarTech providers' recent advancements enable simplified user experiences, comprehensive goal setting, scenario planning and budget management without confusion or disconnect.

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

Does this sound like you?

✓ SPB contribution activities are not formally tracked.

✓ Varying spreadsheets and Powerpoints are used for goal setting, scenario planning and budgeting and they are difficult to reconcile and aggregate.

✓ Integration between these tools is absent.

✓ SPB contributor interactions are generic, and often a matter of editing a document that is passed serially from participant to participant.

✓ SPB information is not entered in systems and only referenceable in source documents.

✓ Links between goals, strategies, plans and budgets do not exist and it is difficult to determine how plans support strategy.

✓ Organization and team SPB workflow is either not defined or defined at a high level and is not broken down into activities.

✓ Specialty systems (e.g. budgeting) must be invoked independently of SPB workflow and may not reflect SPB outputs.

✓ Approval activities are informal may not be reflected in systems.

✓ Compliance to SPB policy can't be accurately evaluated.

Ad Hoc	Basic	Managed	Optimized

Approximately 43% of marketers surveyed still do not use any kind of modern MarTech to manage key marketing activities, hindering the marketing team's ability to meet objectives.
– Gartner, August 2020

Consider the following activities to achieve a BASIC maturity level:

BUSINESS RECOMMENDATIONS

- Begin tracking activities performed by strategy, planning and budgeting participants and gain an understanding of what they do and when they do it.

- Create document templates for primary strategy, planning and budgeting inputs and outputs, and store them in a shared document repository.

- Share documents with participants and leverage online document editing capabilities.

- Establish naming, coding and mapping conventions to link goals, scenarios, plans and budgets across documents, systems, groups and teams.

- Establish standard operating procedures for approvals and encourage participants to use them. Where possible, leverage document approvals.

TECHNOLOGY RECOMMENDATIONS

- Create project templates in project documents (e.g. Spreadsheet).

- Model strategy, planning and budgeting workflow in PowerPoint and spreadsheets.

- Store and share strategy, planning and budgeting documents in a cloud document repository (e.g. Box, OneDrive, Google Drive, etc.).

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