

# Strategy, Planning and Budgeting Readiness Report

This report was dynamically generated from your responses to the CapabilitySource SBP Readiness Calculator. This report includes personalized findings and recommendations about your organization's level of alignment and agility in strategy, planning and budgeting. Use information in this report to understand the strengths and weaknesses in your current strategy development, planning and budgeting processes and create a plan to improve them using modern business capabilities and technology.

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

The SPB Calculator uses 24 simple questions related to people, process, technology and information. Responses are rated as Ad Hoc, Basic, Managed and Optimized. SPB Calculator readiness ratings have been established using real customer experiences, research and analyst consultation. The ratings in this report provide a benchmark perspective. Use the SPB Calculator and this report to determine understanding and alignment across your organization, develop an SPB improvement journey and rate your progress along the way.

## Next Steps

- Analyze results that surprise you and determine the root causes of poor performance.
- Share this report with colleagues, and ask them to take the assessment and evaluate rating discrepancies across teams and organizations.
- Determine your desired level of readiness and consider both the costs and benefits of achieving it.
- Get started by picking one of the four dimensions (people, process, technology and information) and create a tactical plan to improve it.

## Your SPB Readiness Calculator Results



## SPB Readiness Framework - Primary Business Concerns

SPB Calculator questions and ratings are based on a rich set of people, process, technology and information concerns. These concerns are common across organizations of all types and sizes. They are foundational and may be used to determine the level of precision, efficiency and agility in your strategy, planning and budgeting capabilities. Consider how the concerns below map to your organization.

### SPB People Concerns



Knowledge of how SPB is performed  
Awareness of one's roles and responsibilities during SPB  
Trust that information can be shared without reprisal during SPB  
Assurance that creative and innovative SPB ideas will be seriously considered  
Clarity on when and how to engage in the SPB process  
Alignment of human motivation with SPB outcomes  
Clear ownership of SPB outcomes

### SPB Process Concerns



SPB outputs are agile and adjust to changing business needs  
SPB captures and aligns teams across the organization  
SPB changes use an effective change control process  
SPB activities are traceable to desired corporate outcomes  
SPB processes are planned, predictable and compliant  
SPB activities are visible and coordinated amongst participants  
Strategy is aligned with corporate objectives  
Strategy scenarios are frequently evaluated

### SPB Technology Concerns



SPB Tech simplifies user experience  
SPB Tech is adaptable to handle unique and complex business needs  
SPB Techs are tightly integrated with each other  
SPB Tech is specialized to the needs of specific markets  
SPB Tech tightly controls access and visibility  
SPB Tech tracks data and document changes and versions  
SPB Tech maps, allocates and reconciles data relationships

### SPB Information Concerns



External and competitor information awareness  
Internal and external SPB insights  
SPB trending and performance results accessibility  
SPB data awareness and understanding  
SPB data richness, unification and extensibility  
SPB data accuracy and version control