

**Process****People BASIC Level Description**

Strategy, planning and budgeting processes begin with corporate planning and continue with ongoing strategy refinement, program planning and budget adjustment. Tasks and timing are defined. Reviews are conducted and approvals granted. Periodic checks are performed and revisions are made in an orderly, efficient manner.

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

**Does this sound like you?**

✓ Goals exist but they do not flow through the organizational hierarchy and may not be tied to SPB significant effort is required to create and approve strategies.	✓ A single integrated strategy exists and is developed, vetted and prioritized in spreadsheets and PowerPoints and is supported by a single budget scenario.	✓ Stakeholders throughout the organization occasionally consult on SPB but only by exception or late in the process.	✓ A large portion of annual budgeted spend is not in a plan.	✓ There is no controlled process for managing SPB changes. Change signals are not clearly defined and rarely used to invoke SPB shifts.
✓ When shifts occur, it is not clear what will change and the impact it will have.	✓ Assumptions are often used to determine SPB performance.	✓ SPB inputs and outputs are unknown and quality is not evaluated.	✓ The SPB process occurs annually at best and guides activities for 12-36 months.	✓ When the SPB process occurs it directly impacts capacity, availability and scheduling.

Ad Hoc

Basic

**Managed**

Optimized

66% of surveyed marketing leaders indicated that a lack of team collaboration or poorly designed or missing business processes are amongst the top four weaknesses impacting their team's ability to execute and deliver.  
– Gartner, August 2020

Consider the following activities to achieve a **MANAGED** maturity level:

**BUSINESS RECOMMENDATIONS**

- Link goals top to bottom and across the organization to establish goal relationships and impacts.
- Define detailed processes for end-to-end strategy, planning and budgeting activities and manage them within work management systems.
- Develop multiple planning scenarios and link them to goals and projects.
- Capture goals, plans and budgets in specialized tools and move away from the use of spreadsheets and PowerPoints to capture, store and share strategy, planning and budgeting information.
- Find ways to expedite the strategy, planning and budgeting process with parallel activities and smart approvals.
- Simplify the creation of recurring and planned items when it is time to begin work on them.
- Establish on-going, incremental strategy, planning and budgeting performance reporting and initiate changes to strategy, planning and budgeting based on performance findings, predictions and external signals.

**TECHNOLOGY RECOMMENDATIONS**

- Capture strategy details in Workfront.
- Capture strategy goals in Workfront Align.
- Evaluate initiatives scenarios in Workfront Scenario Planner.
- Capture budget information in Allocadia.
- Templatize strategy, planning and budgeting workflow in Workfront.



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