

Process**People BASIC Level Description**

The right processes allow teams to become agile and adjust to changing needs; align teams across the organization; are planned, predictable and compliant; can be traced to business outcomes; are aligned with corporate objectives and are frequently evaluated.

If the following characteristics sound like your organization, you fall into the Basic category. We have recommendations on how to achieve the next level in your digital transformation journey.

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 exist 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.

AdHoc

Basic

Managed

Optimized

24% of CMO's said that a poor Digital technology Strategy is one of the top 3 items inhibiting customer acquisition and loyalty.
– Gartner June 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 Initiative Scenarios in Workfront Scenario Planner
- Capture Budget Information in Allocadia
- Templatize strategy, planning and budgeting workflow in Workfront



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