

**Technology****Technology MANAGED 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 a Managed level of readiness. This level may be described using the characteristics below.

**Does this sound like you?**

✓ SPB contribution activities are clearly defined and managed in project and task technologies.	✓ Specialty tools are used for goal setting, scenario planning and budgeting, but integration between these tools is lacking or absent.	✓ SPB contributor interactions are generic, with similar click paths, edits and tools used to complete each task.	✓ SPB information is entered once but may need reentry to be referenceable and useable across all SPB systems.	✓ Links between goals, strategies, plans and budgets are often established manually.
✓ Organization and team SPB workflow is standardized and pre-defined but may not be formally represented in work management systems.	✓ Specialty systems (e.g. budgeting) are invoked independently of workflow and often require searching once invoked.	✓ Approval activities are defined but must be applied and invoked by SPB participants.	✓ Compliance to SPB policy is difficult to enforce or monitor.	

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 an OPTIMIZED maturity level:

**BUSINESS RECOMMENDATIONS**

- Manage activities performed by all strategy, planning and budgeting participants in a single digital work management system.
- Unify the user experience with specialty tools used to create goals, scenarios, plans and budgets.
- Integrate backend data flow between specialty systems and work management systems to automatically link and map data across these systems, so they appear as if they are the same system to participants.
- Automatically generate, template-based strategies and plans based on wizard style inputs, recurring and historical activities.
- Fully automate strategy, planning and budgeting assignment, approval, execution, change control and versioning.

**TECHNOLOGY RECOMMENDATIONS**

- Simplify and personalize contributor views and input experience in CapabilitySource Connect.
- Lock in and control strategy, planning and budgeting workflow with CapabilitySource Connect.
- Track historical strategy, planning and budgeting changes and versions with CapabilitySource Connect.



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