

Strategy, Planning and Budgeting (SPB) Readiness Calculator Results

Information

Information **AD HOC** Level Description

Strategy, planning and budgeting information includes data related to business goals, objectives, strategies, strategic choices, brands, products, markets, communications, and financials. Information readiness may be measured based on foundational data concerns relate to the richness, accuracy, accessibility, and usefulness of this information.

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?

✓ External market factors, macro influences and competitor insights are rarely evaluated and reconciled to strategies.

✓ Depth and accuracy of external findings may be in question or unknown to SPB participants.

✓ SPB change signals do not exist.

✓ Goal results may be calculated but are not reconciled to plan.

✓ General SPB data is not captured from SPB systems and documents and only exists in source documents.

✓ SPB information is not centrally accessible.

✓ SPB information rarely includes input from Sales, Product, Marketing, other business units and third-party agencies.

Ad Hoc

Basic

Managed

Optimized

50% of surveyed marketing leaders indicated that their most urgent 2020-21 problem is an inability to measure and monitor marketing effectiveness.
– Gartner, January 2020

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

BUSINESS RECOMMENDATIONS

- Establish learning plans and research capability.
- Establish market and competitor optics (e.g. Forrester, Gartner).
- Conduct periodic review of internal and external insights and consider strategy implications.
- Share insights with strategy, planning and budgeting stakeholders and solicit input.
- Mine strategy, planning and budgeting information from document sources and organizations and load it into a data lake.
- Begin calculating strategy, planning and budgeting performance results that align to strategy goals, measurements and metrics.

TECHNOLOGY RECOMMENDATIONS

- Extract and aggregate strategy, planning and budgeting information from document sources using Workfront Fusion, Workato or CapabilitySource Connect.



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