

Process

People **OPTIMIZED** 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 an Optimized level of readiness. This level may be described using the characteristics below.

Does this sound like you?

- ✓ Detailed OKR based SMART goals are considered, captured and communicated electronically.

✓ SPB goals align with strategies and clearly flow from corporation to contributor.

✓ Alternative business strategies exist and are developed, vetted and prioritized electronically.

✓ Alternative budget scenarios exist and are developed, vetted and assigned electronically.

✓ Stakeholders throughout the organization actively contribute using digital technologies.
- ✓ A well defined process is in place and used to actively manage SPB changes.

✓ Change signals are defined and monitored to invoke SPB shifts.

✓ Incremental check points are in common use to determine SPB performance.

✓ SPB inputs and outputs are clearly defined and quality is evaluated.

✓ The SPB process is a living process that runs continually, is always on and adapts naturally to internal and external factors.

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

Congratulations, your responses indicate that you have achieved an **OPTIMIZED** level of maturity for strategy, planning and budgeting.



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