

**Technology****Technology BASIC Level Description**

Optimizing your martech stack allows for a streamlined and personalized process based on roles and preferences. It allows you to integrate data across SPB systems, track historical data values and changes, and easily distribute financial information across systems while generating role-specific information and dashboards.

Based on your answers, we determined that your organization is in the Basic maturity level and have recommendations to achieve the next level on your digital transformation journey.

**Does this sound like you?**

✓ SPB contribution activities are defined but loosely managed and tracked.	✓ Template based spreadsheets and PowerPoints are used for goal setting, scenario planning and budgeting but integration between these tools is manual.	✓ SPB contributor interactions are generic, and often a matter of editing shared documents.	✓ SPB information is reentered in multiple systems and may be different in those systems.	✓ Links between goals, strategies, plans and budgets do not exist or must be entered manually.
✓ Organization and team SPB workflow is defined but is not formally represented in work management systems.	✓ Specialty systems (e.g. budgeting) must be invoked independently of SPB workflow and often requires searching once invoked.	✓ Approval activities must be set and invoked by SPB participants and are often document level and different for each activity.	✓ Compliance to SPB policy is rarely considered and difficult to evaluate.	

AdHoc

Basic

**Managed**

Optimized

Marketers report using only 58% of their  
MarTech stack's full capabilities.  
– Gartner 2019

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

**BUSINESS RECOMMENDATIONS**

- Manage activities performed by strategy, planning and budgeting participants in an automated project or work management system.
- Adopt specialty tools for the creation of goals, scenarios, plans and budgets.
- Integrate backend data flow between specialty systems and work management systems to limit data reentry.
- Expand strategy, planning and budgeting work management to include the orchestration of activities for both internal and external participants.
- Standardize approval workflow and include it in standard strategy, planning and budgeting workflow.
- Begin tracking versions of goals, strategies, scenarios and budgets in source systems and data repositories.
- Integrate risk and compliance into the strategy, planning and budgeting process.

**TECHNOLOGY RECOMMENDATIONS**

- Pre-Define unique strategy, planning and budgeting workflow in Workfront
- Sequence and orchestrate strategy, planning and budgeting contributor activities in Workfront
- Integrate and synchronize strategy, planning and budgeting information with Workfront Fusion, Workato or CapabilitySource Connect
- Link and distribute financial information with Workfront Fusion, Workato or CapabilitySource Connect



Supercharge your marketing digital transformation. Schedule time with a  
CapabilitySource SPB Specialist to improve your readiness.