

People

People **AD HOC** Level Description

Modern strategy, planning and budgeting capabilities depend on an efficient process, advanced technology, and integrated information; however, it is the people who create strategies, plans, and budgets that matter most. Contributors must understand their roles and responsibilities. They must have the knowledge, ability, and desire to craft innovative strategies and the commitment to execute them.

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?

- | | | | | |
|--|--|---|--|---|
| ✓ SPB participant roles and responsibilities are not defined. | ✓ Responsibilities and expectations may be redefined from cycle-to-cycle. | ✓ Internal and external contributors to SPB do not know what is expected of them and do not understand what to do and when. | ✓ The SPB is poorly defined and it is unclear how the process works. | ✓ Creative strategies and non-traditional ideas are not welcomed and often shot down. |
| ✓ SPB participation, timely completion, cross-team cooperation and overall quality is not encouraged with recognition or reward. | ✓ SPB contributors openly dislike participating in SPB activities and often attempt to get out them or don't engage. | ✓ SPB participants do not feel that they have a voice and do not believe that they can impact the SPB outcome. | | |

Ad Hoc

Basic

Managed

Optimized

47% of surveyed marketing leaders indicated that one of their top three most urgent 2020-21 problems is a mismatch between marketing staff skillsets and emerging capability needs.
- Gartner, January 2020

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

BUSINESS RECOMMENDATIONS

- Define strategy, planning and budgeting roles and responsibilities.
- Communicate them to the organization using RACI or a similar role modeling standard.
- Set strategy, planning and budgeting process input and output expectations and communicate them to participants.
- Create level 1 and 2 processes and communicate them to the organization.
- Create a strategy idea submission front door and welcome participation from strategy, planning and budgeting contributors.
- Publicly recognize those that contribute to the strategy, planning and budgeting process.
- Conduct team building activities to promote cooperation and buy-in from core strategy, planning and budgeting participants.

TECHNOLOGY RECOMMENDATIONS

- Define strategy, planning and budgeting roles and responsibilities in Workfront.
- Create an internal strategy, planning and budgeting ideation portal.
- Capture strategy, planning and budgeting metadata and documents in Workfront.



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