

Technology**Technology MANAGED 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 Managed maturity level and have recommendations to achieve full optimization.

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.	

AdHoc

Basic

Managed

Optimized

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

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



Supercharge your marketing digital transformation. Schedule time with a
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