



Your Next Steps

This Readiness Report is designed to assist marketers like you. As you review your organization's readiness and maturity results, you'll find recommendations to help you unlock the next level of your journey.

Strategy, Planning and Budgeting (SPB) Readiness Calculator

No matter where you are on your marketing digital transformation journey, these timely recommendations can be made quickly and at a reasonable cost. This ensures your organization is aligned with business and technology goals in order to adapt quickly in a changing marketplace.

Key Takeaways

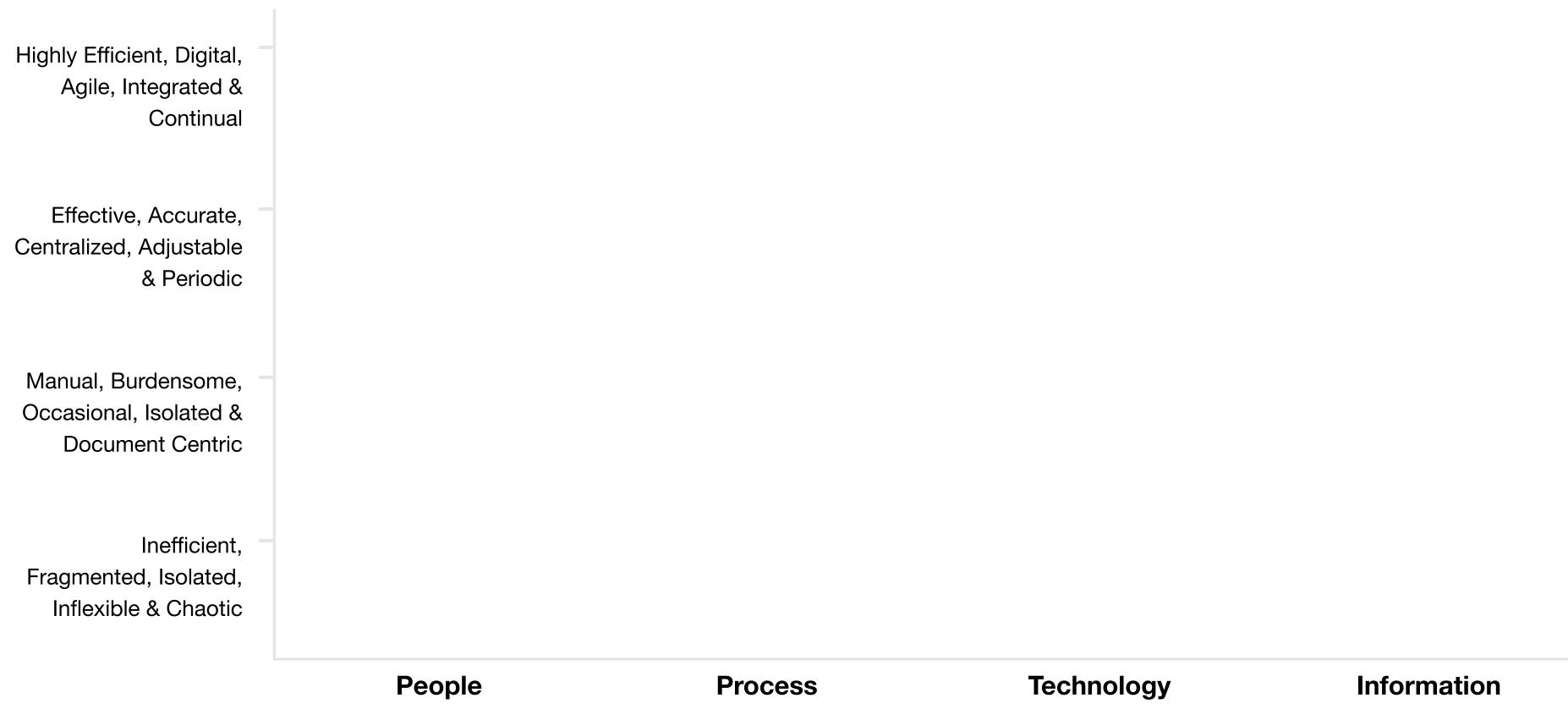
Assess Your Marketing Strategy and Technology...

Whether your team is AdHoc, Basic, Managed or Optimized, we have suggestions to move your company forward and streamline your strategy, planning and budgeting.

MarTech Stack Demands Automation...

Automation allows many manual tasks to become streamlined so you and your team can focus on results.

Your SPB Readiness Calculator Results



Primary SPB Concerns

While there are compelling SPB concerns, our assessment framework provides solutions in the form of knowledge, agility, simplicity and clear and actionable recommendations to align teams and create buy-in for a successful digital transformation. Are you ready to dive in?

SPB People Concerns  Knowledge of how SPB is performed Awareness of one's roles and responsibilities during SPB Trust that information can be shared without reprisal during SPB Assurance that Creative and Innovative SPB ideas will be seriously considered Clarity on when and how to Engage in the SPB process Alignment of human motivation with SPB outcomes Clear Ownership of SPB outcomes	SPB Process Concerns  SPB outputs are Agile and adjust to changing business needs SPB captures and Aligns teams across the organization SPB changes use an effective Change Control process SPB activities are Traceable to desired corporate outcomes SPB processes are Planned, Predictable and Compliant SPB activities are Visible and Coordinated amongst participants Strategy is Aligned with corporate objectives Strategy Scenarios are Frequently evaluated
SPB Technology Concerns  SPB Tech Simplifies user experience SPB Tech is Adaptable to handle unique and Complex business needs SPB Techs are tightly Integrated with each other SPB Tech is Specialized to the needs of specific markets SPB Tech tightly Controls Access and Visibility SPB Tech Tracks data and document changes and versions SPB Tech Maps, Allocates and Reconciles data relationships	SPB Information Concerns  External and Competitor info Awareness Internal and External SPB Insights SPB Trending and Performance Results Accessibility SPB Data Awareness and Understanding SPB Data Richness, Unification and Extensibility SPB Data Accuracy and Version Control

**People****People ADHOC Level Description**

Company-wide buy-in is often the number one reason for marketing digital transformation success or failure. Culture and change management are key to a company's adoption and ability to adjust to changing market trends. Ensuring there are defined roles and responsibilities provides a framework for creativity.

Based on your answers, your company falls into the AdHoc category. See if the characteristics below sound like your company.

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 of 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. | | |

AdHoc

Basic

Managed

Optimized

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

"Recent years' surveys have also shown a lack of business model change penetration and other indicators, which causes us to think that many of these digital initiatives may not be sufficiently deep corporate transformations," says Mark Raskino, Distinguished VP Analyst, Gartner
"Avoid These 9 Corporate Digital Business Transformation Mistakes"

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



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

**People****People BASIC Level Description**

Company-wide buy-in is often the number one reason for marketing digital transformation success or failure. Culture and change management are key to a company's adoption and ability to adjust to changing market trends. Ensuring there are defined roles and responsibilities provides a framework for creativity.

Based on your answers, your company falls into the AdHoc category. See if the characteristics below sound like your company.

Does this sound like you?

- | | | | | |
|---|---|--|---|--|
| ✓ SPB participant roles and responsibilities are defined but may be dated and unclear. | ✓ SPB responsibilities and expectations change organically from cycle-to-cycle. | ✓ Internal and external contributors to SPB question what is expected of them and often do not understand what to do and when. | ✓ Parts of the SPB process are defined but it is unclear how the pieces fit together. | ✓ Creative strategies and non-traditional ideas are considered to be distractions. |
| ✓ Reward systems don't consider SPB participation, timely completion, cross-team cooperation and overall quality. | ✓ SPB contributors reluctantly participate in SPB activities. | ✓ SPB participants question if they really have a voice and if they can impact the SPB outcomes. | | |

AdHoc

Basic

Managed

Optimized

"Recent years' surveys have also shown a lack of business model change penetration and other indicators, which causes us to think that many of these digital initiatives may not be sufficiently deep corporate transformations," says Mark Raskino, Distinguished VP Analyst, Gartner "Avoid These 9 Corporate Digital Business Transformation Mistakes"

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

- Define strategy, planning and budgeting roles and responsibilities and configure them in a work management system.
- Set strategy, planning and budgeting activity level input and output expectations and communicate them with templates and examples.
- Create level 3 and 4 processes and communicate them to the organization.
- Create a strategy ideation portal and monitor participation from strategy, planning and budgeting contributors.
- Recognize those that contribute to the strategy, planning and budgeting process and provide incentives for creative, high-quality strategy, planning and budgeting outputs.
- Conduct team building activities to promote cooperation and buy-in across the organization.
- Establish formal strategy, planning and budgeting peer review.

TECHNOLOGY RECOMMENDATIONS

- Standardize and Integrate cross-org strategy, planning and budgeting workflow in Workfront.
- Standardize and track strategy, planning and budgeting activities and status in Workfront.



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**People****People MANAGED Level Description**

Company-wide buy-in is often the number one reason for marketing digital transformation success or failure. Culture and change management are key to a company's adoption and ability to adjust to changing market trends. Ensuring there are defined roles and responsibilities provides a framework for creativity.

Based on your answers, your company falls into the AdHoc category. See if the characteristics below sound like your company.

Does this sound like you?

- | | | | | |
|--|--|---|---------------------------------------|---|
| ✓ SPB participant roles and responsibilities are defined. | ✓ Levels of SPB responsibility and participation have been communicated. | ✓ Internal and external contributors to SPB know what is expected of them but may not understand exactly what to do and when. | ✓ The overall SPB process is defined. | ✓ Creative strategies and non-traditional ideas are welcomed and may be considered. |
| ✓ Reward systems generally encourage SPB participation, timely completion, cross-team cooperation and overall quality. | ✓ SPB contributors willingly participate in SPB activities. | ✓ SPB participants believe that they have a voice and that they can impact the SPB outcomes. | | |

AdHoc**Basic****Managed****Optimized**

Consider the following activities to achieve an **OPTIMIZED maturity level:**

"Recent years' surveys have also shown a lack of business model change penetration and other indicators, which causes us to think that many of these digital initiatives may not be sufficiently deep corporate transformations," says Mark Raskino, Distinguished VP Analyst, Gartner "Avoid These 9 Corporate Digital Business Transformation Mistakes"

BUSINESS RECOMMENDATIONS

- Augment strategy, planning and budgeting roles and responsibilities in work management systems with effort estimates and standard operating procedures.
- Create formal, role-based strategy, planning and budgeting education curriculum and require completion by strategy, planning and budgeting participants.
- Set strategy, planning and budgeting effort level and timing expectations and reinforce them in strategy, planning and budgeting digital work management systems.
- Fold level 3 and 4 process into digital work management systems and include strategy, planning and budgeting activities throughout the organization.
- Recognize and reward contributions to the strategy ideation portal and encourage participation throughout the organization and from partners by fairly considering all ideas internal and external.
- Survey strategy, planning and budgeting participants for both experience and conduct strategy, planning and budgeting participant peer reviews.

TECHNOLOGY RECOMMENDATIONS

- Build an Internal, searchable strategy, planning and budgeting knowledge management portal
- Develop strategy, planning and budgeting training and publish it in Adobe AEM



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**People****People OPTIMIZED Level Description**

Company-wide buy-in is often the number one reason for marketing digital transformation success or failure. Culture and change management are key to a company's adoption and ability to adjust to changing market trends. Ensuring there are defined roles and responsibilities provides a framework for creativity.

Based on your answers, your company falls into the AdHoc category. See if the characteristics below sound like your company.

Does this sound like you?

- | | | | | |
|---|---|---|---|---|
| ✓ SPB contributor roles are clearly defined and assigned. | ✓ Levels of SPB responsibility and participation are widely understood. | ✓ Internal and external contributors to SPB know exactly what is expected of them and where their efforts fit in the overall SPB process, before they engage. | ✓ The overall SPB process is visible and intuitive. | ✓ Creative strategies and non-traditional ideas are encouraged of all SPB participants are evaluated fairly and confidentially. |
| ✓ Reward systems clearly encourage active SPB participation, timely completion, cross-team cooperation and overall quality. | ✓ SPB contributors look forward to and enjoy participating in SPB activities. | ✓ SPB participants believe that they have a voice and their contributions are meaningful and appreciated. | | |

AdHoc**Basic****Managed****Optimized**

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

"Recent years' surveys have also shown a lack of business model change penetration and other indicators, which causes us to think that many of these digital initiatives may not be sufficiently deep corporate transformations," says Mark Raskino, Distinguished VP Analyst, Gartner "Avoid These 9 Corporate Digital Business Transformation Mistakes"



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Process

Process ADHOC Level Description

The right processes allow teams to become agile and adjust to changing needs; align teams across the organization; are planned, predictable and compliant; can be traced to business outcomes; are aligned with corporate objectives and are frequently evaluated.

If the following characteristics sound like your organization, you fall into the Basic category. We have recommendations on how to achieve the next level in your digital transformation journey.

Does this sound like you?

✓ Goals do not exist or they are dated and do not align with strategy.	✓ A single strategy may exist but it is high-level, lacks validation and is not aligned to plans, budgets and market conditions.	✓ Spreadsheets and PowerPoints are used to capture, refine and convey SPB.	✓ Strategies are developed to support budgets, instead of the other way around.	✓ Stakeholders throughout the organization are rarely consulted on SPB and are unaware of how SPB impacts them.
✓ Changes rarely occur to SPB, once approved, regardless of internal and external conditions. Change signals and markers do not exist.	✓ SPB performance is rarely measured and when measured, accuracy is questionable.	✓ SPB inputs and outputs are unknown and SPB is developed in a silo.	✓ The SPB process is annual at best and is not reconsidered for 12-36 months.	✓ When it occurs the SPB process and directly and significantly impacts capacity, availability and scheduling for the few involved.

AdHoc

Basic

Managed

Optimized

24% of CMO's said that a poor Digital technology Strategy is one of the top 3 items inhibiting customer acquisition and loyalty.
– Gartner June 2020

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

BUSINESS RECOMMENDATIONS

- Based on best-practice and experience, define goals, metrics and measures.
- Establish a level 1 strategy, planning and budgeting process with start, end and desired outcomes.
- Establish definitions for a strategy, goal, plan, scenario and budget.
- Begin the SPB process with strategy and then develop supporting budgets.
- Create document templates to standardize the capture of strategy, goals, plans and budget information.
- Identify planned and recurring spend items and mark them in plans and budgets.
- Establish periodic SPB performance reporting. Identify internal and external factors that may impact strategy, planning and budgeting.
- Establish an strategy, planning and budgeting cycle that occurs at least annually and plan ahead for it.

TECHNOLOGY RECOMMENDATIONS

- Create document templates (e.g. Excel) to capture goals, plans, scenarios, budgets and manage these documents in Workfront
- Establish collaboration between strategy, planning and budgeting participants in Workfront, MS Teams, Slack or similar technology



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Process

People **BASIC** Level Description

The right processes allow teams to become agile and adjust to changing needs; align teams across the organization; are planned, predictable and compliant; can be traced to business outcomes; are aligned with corporate objectives and are frequently evaluated.

If the following characteristics sound like your organization, you fall into the Basic category. We have recommendations on how to achieve the next level in your digital transformation journey.

Does this sound like you?

✓ Goals exist but they do not flow through the organizational hierarchy and may not be tied to SPB significant effort is required to create and approve strategies.	✓ A single integrated strategy exist and is developed, vetted and prioritized in spreadsheets and PowerPoints and is supported by a single budget scenario.	✓ Stakeholders throughout the organization occasionally consult on SPB but only by exception or late in the process.	✓ A large portion of annual budgeted spend is not in a plan.	✓ There is no controlled process for managing SPB changes. Change signals are not clearly defined and rarely used to invoke SPB shifts.
✓ When shifts occur, it is not clear what will change and the impact it will have.	✓ Assumptions are often used to determine SPB performance.	✓ SPB inputs and outputs are unknown and quality is not evaluated.	✓ The SPB process occurs annually at best and guides activities for 12-36 months.	✓ When the SPB process occurs it directly impacts capacity, availability and scheduling.

AdHoc

Basic

Managed

Optimized

24% of CMO's said that a poor Digital technology Strategy is one of the top 3 items inhibiting customer acquisition and loyalty.
– Gartner June 2020

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

BUSINESS RECOMMENDATIONS

- Link goals top to bottom and across the organization to establish goal relationships and impacts.
- Define detailed processes for end-to-end strategy, planning and budgeting activities and manage them within work management systems.
- Develop multiple planning scenarios and link them to goals and projects.
- Capture goals, plans and budgets in specialized tools and move away from the use of spreadsheets and PowerPoints to capture, store and share strategy, planning and budgeting information.
- Find ways to expedite the strategy, planning and budgeting process with parallel activities and smart approvals.
- Simplify the creation of recurring and planned items when it is time to begin work on them.
- Establish on-going, incremental strategy, planning and budgeting performance reporting and initiate changes to strategy, planning and budgeting based on performance findings, predictions and external signals.

TECHNOLOGY RECOMMENDATIONS

- Capture Strategy Details in Workfront
- Capture Strategy Goals in Workfront Align
- Evaluate Initiative Scenarios in Workfront Scenario Planner
- Capture Budget Information in Allocadia
- Templatize strategy, planning and budgeting workflow in Workfront



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Process

Process **MANAGED** Level Description

The right processes allow teams to become agile and adjust to changing needs; align teams across the organization; are planned, predictable and compliant; can be traced to business outcomes; are aligned with corporate objectives and are frequently evaluated.

If the following characteristics sound like your organization, you fall into the Managed category. We have recommendations on how to achieve the next level in your digital transformation journey.

Does this sound like you?

✓ Goals are considered, captured and accessible to SPB participants but may not be widely available.	✓ SPB goals generally align with strategies and exist at various levels in the organization but may not be linked in a hierarchy.	✓ Goals, plans and budgets are captured in specialized tools.	✓ Alternative business strategies exist and may be developed, vetted and prioritized in spreadsheets.	✓ Stakeholders throughout the organization actively contribute.
✓ The process used to actively manage SPB changes is not clearly understood.	✓ Change signals are defined but infrequently monitored to invoke SPB shifts. When shifts occur it is not always clear what will change and the impact it will have.	✓ Check points are occasionally used to determine SPB performance.	✓ SPB inputs and outputs are generally known but quality is not clearly defined.	✓ The SPB process is a periodic process that runs occasionally and often impacts capacity and availability when it occurs.

AdHoc

Basic

Managed

Optimized

24% of CMO's said that a poor Digital technology Strategy is one of the top 3 items inhibiting customer acquisition and loyalty.
– Gartner June 2020

Consider the following activities to achieve an **OPTIMIZED maturity level:****BUSINESS RECOMMENDATIONS**

- Establish an OKR goal framework that tightly aligns goals throughout the organization and clearly conveys dependencies and relationships.
- Automate detailed strategy, planning and budgeting processes from end-to-end, integrating specialty tools and digital work management systems.
- Develop multiple planning scenarios and determine the internal and external signals that trigger strategy shift.
- Capture goals, plans, budgets and scenarios in specialized tools and automatically link them together.
- Fully automate strategy, planning and budgeting approvals, changes and rework.
- Automatically generate recurring and planned items when it is time begin work on them.
- Establish on-going, incremental strategy, planning and budgeting performance dashboards and automatically initiate changes to strategy, planning and budgeting based on performance findings, predictions and external signals.

TECHNOLOGY RECOMMENDATIONS

- Link goals throughout the organization with Workfront Align
- Fully automate approvals and changes with CapabilitySource Connect
- Lock-in and control access to strategy, planning and budgeting Workflow and data with CapabilitySource Connect



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



Process

People **OPTIMIZED** Level Description

The right processes allow teams to become agile and adjust to changing needs; align teams across the organization; are planned, predictable and compliant; can be traced to business outcomes; are aligned with corporate objectives and are frequently evaluated.

If the following characteristics sound like your organization, you fall into the Basic category. We have recommendations on how to achieve the next level in your marketing digital transformation journey.

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.

AdHoc

Basic

Managed

Optimized

24% of CMO's said that a poor Digital technology Strategy is one of the top 3 items inhibiting customer acquisition and loyalty.
– Gartner June 2020

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



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Technology

Technology **ADHOC** 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 AdHoc maturity level and have recommendations to help you achieve the next level on your marketing digital transformation journey.

Does this sound like you?

✓ SPB contribution activities are not formally tracked.	✓ Varying spreadsheets and Powerpoints are used for goal setting, scenario planning and budgeting and they are difficult to reconcile and aggregate.	✓ Integration between these tools is absent.	✓ SPB contributor interactions are generic, and often a matter of editing a document that is passed serially from participant to participant.	✓ SPB information is not entered in systems and only referenceable in source documents.
✓ Links between goals, strategies, plans and budgets do not exist and its difficult to determine how plans support strategy.	✓ Organization and team SPB workflow is either not defined or defined at a high level and is not broken down into activities.	✓ Specialty systems (e.g. budgeting) must be invoked independently of SPB workflow and may not reflect SPB outputs.	✓ Approval activities are informal may not be reflected in systems.	✓ Compliance to SPB policy can't be accurately evaluated.

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 **BASIC** maturity level:

BUSINESS RECOMMENDATIONS

- Begin tracking activities performed by strategy, planning and budgeting participants and gain an understanding of what they do and when they do it.
- Create document templates for primary strategy, planning and budgeting inputs and outputs and store them in a shared document repository.
- Share documents with participants and leverage online document editing capabilities.
- Establish naming, coding and mapping conventions to link goals, scenarios, plans and budgets across documents, systems, groups and teams.
- Establish standard operating procedures for approvals and encourage participants to use them. Where possible, leverage document approvals.

TECHNOLOGY RECOMMENDATIONS

- Create project templates in project documents (e.g. Spreadsheet)
- Model strategy, planning and budgeting workflow in PowerPoint and spreadsheets
- Store and share strategy, planning and budgeting documents in a cloud document repository (e.g. Box, OneDrive, Google Drive, etc.)



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



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



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**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



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Technology

Technology **OPTIMIZED** 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 Optimized maturity level and have recommendations to help you supercharge your digital strategy.

Does this sound like you?

- | | | | | |
|---|--|---|---|--|
| ✓ SPB contribution activities are clearly defined and actively managed in cloud based digital work management technologies. | ✓ Fully integrated specialty tools are used for goal setting, scenario planning and budgeting. | ✓ SPB contributor interactions are personalized and adapted to the unique needs and preferences of each contributor, limiting the number of clicks, edits and tools needed to complete each task. | ✓ SPB information is entered once and is then referenceable and useable across all SPB systems. | ✓ Goals link seamlessly through to scenarios and scenarios link seamlessly through to projects and activities. |
| ✓ Organization and team SPB workflow is standardized, templated and pre-defined in work management systems. | ✓ Work activities link seamlessly through to specialty systems (e.g. budgeting). | ✓ Approval activities are well defined and automated with rigid business rules and compliance to SPB policy is locked-in with automation. | | |

AdHoc

Basic

Managed

Optimized

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– Gartner 2019

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



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**Information****Information ADHOC Level Description**

Using searchable digital portal technologies, the ability to gather and share external market factors, macro influences and competitor insights that impact strategy are critical keys to success which enable teams to quickly compare goal results against the larger plan.

Based on your answers, your company falls into the AdHoc category. See if the characteristics below sound like your company.

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. | | | |

AdHoc

Basic

Managed

Optimized

40% of CMOs expect budget cuts greater than 15% in 2020
– Gartner April 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, measure and metrics.

TECHNOLOGY RECOMMENDATIONS

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



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

**Information****Information BASIC Level Description**

Using searchable digital portal technologies, the ability to gather and share external market factors, macro influences and competitor insights that impact strategy are critical keys to success which enable teams to quickly compare goal results against the larger plan.

Based on your answers, your company falls into the Basic category. See if the characteristics below sound like your company and our recommendations for unlocking your next maturity level.

Does this sound like you?

✓ External market factors, macro influences and competitor insights are occasionally evaluated and reconciled to strategies.	✓ Depth and accuracy of external findings may be in question.	✓ Findings may be shared with SPB participants periodically but are not considered inputs to the SPB process.	✓ SPB change signals do not exist or rarely invoke SPB changes.	✓ Goal results may be calculated but are rarely reconciled to plan.
✓ General SPB data is captured from SPB systems and documents but the data set is basic and versioning is absent.	✓ SPB information is centrally accessible but linking data relationships and quality are poor.	✓ SPB information may include input from Sales, Product, Marketing, other business units and third-party agencies.		

AdHoc

Basic

Managed

Optimized

40% of CMOs expect budget cuts greater than 15% in 2020
– Gartner April 2020

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

- Establish ongoing research and competitor analysis function. Continually evaluate internal and external factors and how they impact strategy.
- Publish research and learning plan findings to strategy, planning and budgeting participants and stakeholders.
- Monitor pre-defined strategy change signals.
- Mine strategy, planning and budgeting information from specialty strategy, goal, scenario, plan and work management systems and load it into a data lake.
- Routinely and accurately calculate strategy, planning and budgeting performance results that align to strategy goals, measure and metrics and share this information with strategy, planning and budgeting participants and stakeholders.

TECHNOLOGY RECOMMENDATIONS

- Extract Integrated strategy, planning and budgeting Information from systems with Workfront Fusion, Workato or CapabilitySource Connect
- Generate strategy, planning and budgeting analytics and insights using BI tools
- Audit, archive and attest to strategy, planning and budgeting data using BI tools
- Benchmark to historical performance using BI tools



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**Information****Information MANAGED Level Description**

Using searchable digital portal technologies, the ability to gather and share external market factors, macro influences and competitor insights that impact strategy are critical keys to success which enable teams to quickly compare goal results against the larger plan.

Based on your answers, your company falls into the Managed category. See if the characteristics below sound like your company and our recommendations for achieving full optimization.

Does this sound like you?

- | | | | | |
|--|---|--|---|---|
| ✓ External market factors, macro influences and competitor insights are periodically evaluated and reconciled to strategies. | ✓ Findings may be shared with SPB participants during SPB execution and evaluated against SPB change signals and conditions to determine if change is needed. | ✓ Goal results are periodically calculated and compared to plan. | ✓ General SPB data is captured from SPB systems but data set extensibility and enrichment is limited and field level versioning and tracking may not exist. | ✓ SPB information is centrally accessible but accuracy and timeliness may be in question. |
| ✓ SPB information often includes input from Sales, Product, Marketing, other business units and third-party agencies. | | | | |

AdHoc

Basic

Managed

Optimized

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Consider the following activities to achieve an OPTIMIZED maturity level:**BUSINESS RECOMMENDATIONS**

- Establish ongoing research and competitor analysis work management and portal capabilities.
- Continually evaluate internal and external factors and how they impact strategy and automatically initiate notifications and change management activities.
- Publish research and learning plan findings to strategy, planning and budgeting participants and stakeholders based on their preferences and interests.
- Automatically monitor pre-defined strategy change signals.
- Extend and augment strategy, planning and budgeting information to include unique business area information and 3rd party data.
- Provide a strategy, planning and budgeting information portal that controls access and use of strategy, planning and budgeting information.

TECHNOLOGY RECOMMENDATIONS

- Build an Internal, Searchable strategy, planning and budgeting portal
- Extract, transform and load strategy, planning and budgeting extracts into IDW tools



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**Information****Information OPTIMIZED Level Description**

Using searchable digital portal technologies, the ability to gather and share external market factors, macro influences and competitor insights that impact strategy are critical keys to success which enable teams to quickly compare goal results against the larger plan.

Based on your answers, your company falls into the Optimized category. See if the characteristics below sound like your company and contact us to see how you can supercharge your digital strategy.

Does this sound like you?

- External market factors, macro influences and competitor insights are continuously evaluated and reconciled to strategies using searchable digital portal technologies.
 - Findings are proactively shared with SPB participants and evaluated against pre-defined and automatically monitored SPB change signals.
 - Goal results are automatically and continually calculated and compared to plan.
 - Unique and complex SPB data is captured, enriched, managed and versioned.
 - Comprehensive, conformed, high-quality SPB information is centrally accessible based on a tightly controlled access policy.
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- SPB information includes direct inputs from Sales, Product, Marketing, other business units and third-party agencies.

AdHoc**Basic****Managed****Optimized**

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



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Marketing Technologies Must Align with Company Business Outcomes

Your marketing digital transformation doesn't need to be overwhelming. Our proven process will successfully walk you and your organization through marketing digital transformation to allow you to more quickly adjust to changing customer demands and increase ROI.

We design solutions that allow marketers to confidently convey how marketing contributes to corporate revenue, supports sales conversions, improves compliance without limiting creativity and easily develops a shared MarTech roadmap and technology spend agenda with IT.

We design alignment between Marketing and Finance to gain greater transparency. Companies that have a high degree of alignment between Marketing and Finance have marketing budgets that are up to 4 percent of gross annual revenue higher than their counterparts.

26%

According to a recent study, 26 percent of the average marketing budget is now allocated to technology. Yet, CMOs do not feel that their organizations have a MarTech roadmap that properly supports and enables marketing strategy. CapabilitySource can change that.

Now that you understand your organization's maturity level and the recommended next steps, reach out to talk to one of our SPB analysts to continue on your marketing digital transformation journey. We look forward to helping you.

Speak with a CapabilitySource SPB Specialist

Gain confidence in your decisions by working with CapabilitySource thought leaders to apply our SPB assessment results to your specific marketing and technology initiatives.



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SPB Specialist



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