

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.