Strategy, Planning and Budgeting (SPB) Readiness Calculator Results

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.