

## Strategy, Planning and Budgeting (SPB) Readiness Calculator Results

### Information

### Information **BASIC** Level Description

Strategy, planning and budgeting information includes data related to business goals, objectives, strategies, strategic choices, brands, products, markets, communications, and financials. Information readiness may be measured based on foundational data concerns relate to the richness, accuracy, accessibility, and usefulness of this information.

Based on your responses in the SPB Calculator, your organization has a Basic level of readiness. This level may be described using the characteristics below.

### 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.		

Ad Hoc

Basic

**Managed**

Optimized

*50% of surveyed marketing leaders indicated that their most urgent 2020-21 problem is an inability to measure and monitor marketing effectiveness.*  
– Gartner, January 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, measurements 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.



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