

A close-up photograph of a person's hands typing on a laptop. The person is wearing a tan, textured sweater, a black watch, and several gold-colored bracelets. The laptop is open on a wooden desk. The background is slightly blurred, showing a window with a view of a city.

# Strategic Planning and Budgeting Essentials

**2019 Step-by-Step Guide for  
Customer Service & Support**

**Part 2 of 3**

**Gartner®**

## Part 2

# Set Goals, Allocate Resources, Identify Measures and Metrics

This is part two of a three-part strategic planning and budgeting guide. It focuses on how to assess capabilities, set and measure your strategic objectives, and allocate resources.

Part one provides a foundational level-set for functional leaders as they embark on strategic planning.

Part three provides hands-on tools, templates and guidance to execute the plan effectively.

**Contact our team to discover Gartner's full suite of insights, templates and peer examples to help you develop and drive your functional strategy.**

**Discover more at:**

**[gartner.com/strategicplanning](https://gartner.com/strategicplanning)**

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## How to use this guide

This three-part guide offers a roadmap for strategic planning at the functional level.

It provides guidance, tools, templates and lessons learned from practitioners on how functional leaders can tackle the essentials of a successful functional strategic plan.

### Part 1

- Verify your mandate.
- Define how enterprise strategy could and should change your function's priorities.
- Commit to being strategic in how your function supports and drives enterprise ambitions for innovation, growth and competitive advantage.

### Part 2

- Identify and assess critical capabilities.
- Define your function's objectives and know how to measure success.
- (Re)prioritize the allocation of budget, resources and capacity.

### Part 3

- Distill the strategy down to one simple, coherent page.
- Embed the plan in your function and enterprise.
- Know when and how to revisit and adjust the plan as conditions change.

## Resource key



Keep track of your progress



How-to guide: Tactical tool or template, developed from Gartner's experience with clients



Create your own: Populate your own template based on our example (some forms are interactive in e-books)



Peer example: Sample approach, developed from Gartner's work with one or more practitioners



Stop and check that you have what you need from this step



Designates a live link in the digital e-book

## Find relevant resources and tools at the end of each step.



Discover how Gartner can help you with your strategic planning and budgeting.

Contact us: [strategicplanning@gartner.com](mailto:strategicplanning@gartner.com)

# Contents

## Part 1

Strategic  
Planning and  
Budgeting  
Foundations

### **Mission: Map How to Win**

The mandate for functional leaders is to identify and prioritize initiatives that will further the enterprise strategy for driving innovation, growth and competitive advantage.

**Step 1**  
**Be Strategic on Costs and Budgeting**

**Step 2**  
**Identify Key Peers, Influencers and Sign-Offs**

**Step 3**  
**Determine the Impact of Business Strategy on Your Function**

## Part 2

Set Goals,  
Allocate Resources,  
Identify Measures and Metrics

**Step 4**  
**Establish Whether You Have the Right Capabilities**

**Step 5**  
**Define and Measure Your Function's Objectives**

**Step 6**  
**Look to Fund Innovation and Growth**

## Part 3

Execute on Your Plan

**Step 7**  
**Put the Strategy on One Page**

**Step 8**  
**Drive the Plan Home Across the Enterprise**

**Step 9**  
**Prepare to Respond to Change**



## Step 4

Establish Whether  
You Have the Right  
Capabilities

## Step 4: Establish Whether You Have the Right Capabilities

“By proactively focusing on high-value capabilities, we have increased our profile with the lines of business.”

Senior executive, financial services company

### Do you have what it takes to drive enterprise ambitions?

As you determine the impact of business goals on your functional priorities, you'll also need to evaluate the availability and maturity of the capabilities required to bolster your function and drive the enterprise value proposition — even as that proposition evolves.

Digitalization is causing business models to evolve more often and more quickly than in times past, so assessing current capabilities is a vital first step to future-proofing your function.

Listen to business leaders' priorities, but also identify which of your function's activities best align with business objectives. Use feedback from business and other stakeholders to evaluate your function's current effectiveness at those activities.

If business partner conversations surface a significant difference between the function's self-assessment and business partners' perceptions of strengths and weaknesses in functional capabilities, note this as a red flag to address.

Make sure this step doesn't become a constraint on your ambitions. You're not assessing your strengths and weaknesses so as to limit your objectives to current capabilities. Rather, you want to determine where your team is effectively supporting the organization right now, and where better support is required now and in the future.

Identify and collect data on key talent and organizational metrics, using measurement options such as functional maturity models and activity priority indexes. This exercise should inform your plans to close critical gaps and take advantage of key strengths.



## Step 4

Establish Whether  
You Have the Right  
Capabilities

Based on the collective understanding (among business and functional leaders) of the function's strengths and weaknesses, identify critical outcomes the function needs to achieve to deliver on its value proposition.

"Continuous self-assessment and improvement is so important," says one functional leader at an energy and utilities company. "We cannot just rely on people telling us that we are doing a good job."

Along with strengths and weaknesses, assess opportunities and threats for the function.

### Resources for this step



**How-to guide: Identify Your Function's Biggest Capabilities Challenges**



**How-to guide: Map Strengths, Weaknesses, Opportunities and Threats (SWOT) in Capabilities**



**Create your own: SWOT in Capabilities**



### What to take away from step 4

- Clear assessment of the availability and maturity of the capabilities your function needs to pursue the initiatives that will drive business strategy
- A prioritized list of functional capabilities to bolster or gaps to fill to support business goals



**Peer example: Identify the Capabilities Most Critical for Strategy Execution**



**How-to guide: Framework for Talent Segmentation Based on Business Strategy**



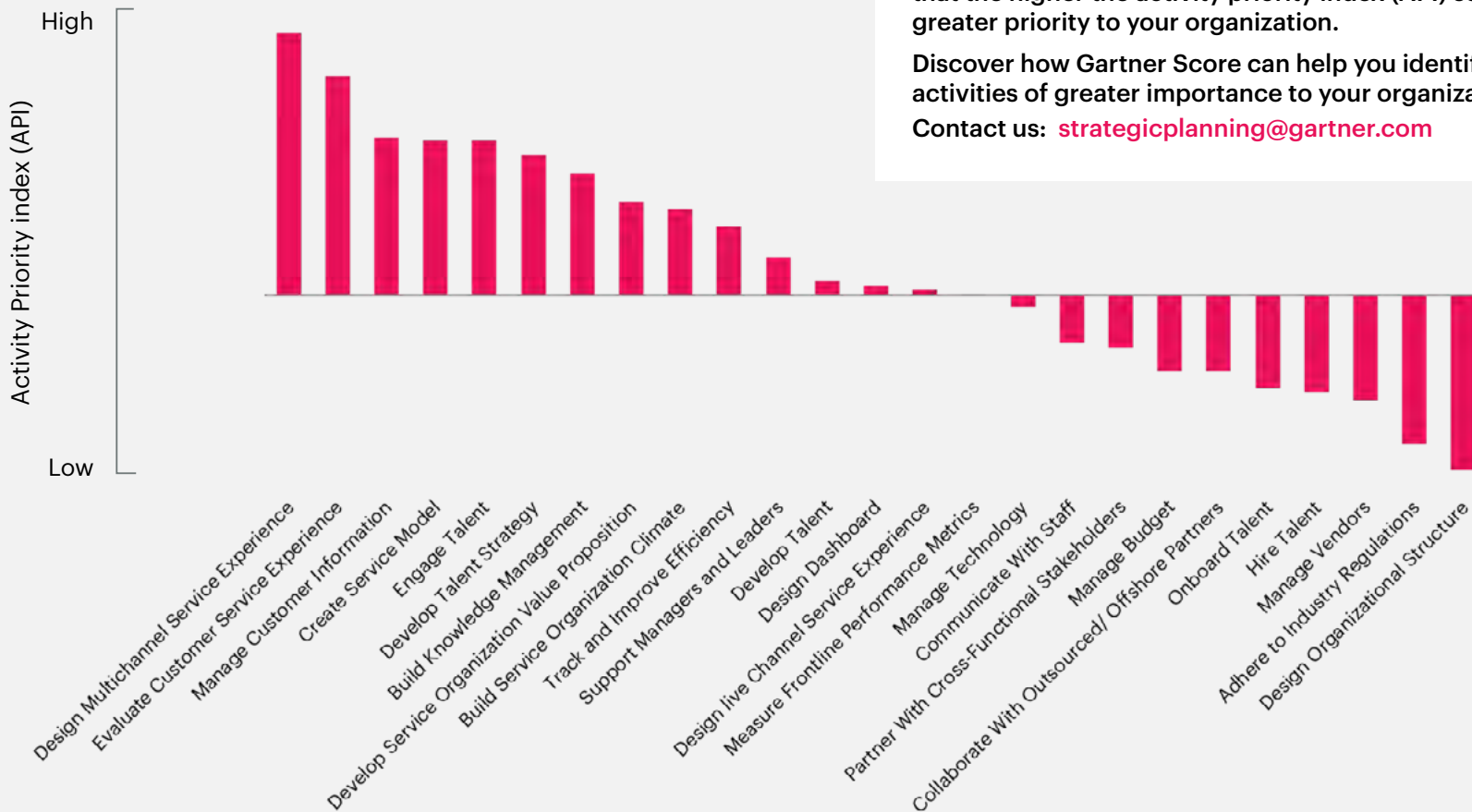
# Identify Your Function’s Biggest Capabilities Challenges

Gartner Score evaluates the effectiveness of your function using objective peer-based performance standards.

This chart from a sample Gartner Score assessment indicates that the higher the activity priority index (API) score, the greater priority to your organization.

Discover how Gartner Score can help you identify the activities of greater importance to your organization.

Contact us: [strategicplanning@gartner.com](mailto:strategicplanning@gartner.com)



API identifies where the function is less mature in activities of greater importance. A higher API score indicates a greater priority to the organization.



## Strengths, Weaknesses, Opportunities and Threats (SWOT) in Capabilities — Example

Use a SWOT analysis to identify strengths and weaknesses, and to assess opportunities and threats for your function. **Ask yourself:**

### Strengths

#### Criteria Examples

- What capabilities does the service and support department have?
- Does the service and support team have institutional knowledge?
- What is the level of expertise of the service and support department?
- How innovative is the team?
- How resourceful is the team?
- Does the technology we have give us a competitive advantage?

### Weaknesses

#### Criteria Examples

- Are there any capability gaps?
- Do we have visibility into the business partners' goals and objectives?
- How is the service and support department perceived by its business partners?
- Do we have the bench strength to meet the demands of our business partners?
- Are we lacking certain specialized skills?

### Opportunities

#### Criteria Examples

- Are there any niche markets in which the company would have a competitive advantage?
- Are there additional resources we could leverage through recent mergers and acquisitions?
- Are there major contracts we could further support?
- What service and support processes can be automated or optimized?
- Are there ways to further train our business partners in service and support matters?

### Threats

#### Criteria Examples

- Do we have the knowledge to enter into new markets?
- What is the outlook for increased regulatory intensity?
- Is there the possibility of increased litigation?
- Are there technology developments that will impact the company?
- Are our vital contracts up for renewal?
- Is there potential for key staff turnover?



# Strengths, Weaknesses, Opportunities and Threats (SWOT) in Capabilities

Continuous self-assessment and improvement is so important. Use a SWOT analysis to identify strengths and weaknesses, and to assess opportunities and threats for your function.



Type in the light blue fields to complete the interactive form

**Strengths**

**Weaknesses**

**Opportunities**

**Threats**



## Identify the Capabilities Most Critical for Strategy Execution

One global specialty materials maker defines the talent most critical to strategy execution and most impacted by the implementation of the organization's strategy.

The company segments key roles in a four-category framework, in which it identifies the following types of roles:

- Critical to future strategy and growth
- Consistently core to the business
- Requisite but not value-added
- Noncore, with declining relevance



### Step 4

Establish Whether You Have the Right Capabilities



**Gartner can help you identify the skills needed to deliver against your mission-critical priorities and build the successful organizations of tomorrow.**

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**Step 4**

Establish Whether You Have the Right Capabilities

# Framework for Talent Segmentation Based on Business Strategy

## Strategy-Critical Roles

## Strategy-Impacted Roles

### Strategic Talent

What capabilities are critical for driving long-term competitive advantage and revenue growth?

**Characteristics**

- Specialized skills or knowledge (IP)
- Visible externally and internally
- Direct impact on revenue or business performance

### Requisite Talent

What capabilities are needed for the business but could be delivered more cost-effectively?

**Characteristics**

- No specialized skills or knowledge
- Limited impact on business performance
- No external customer touchpoints

### Core Talent

What capabilities are unique to the organization and core to delivering products and services?

**Characteristics**

- Essential for strategy or process execution
- Not directly transferable to other organizations
- Limited direct impact on revenue

### Noncore Talent

What capabilities are no longer aligned with the organization's strategic direction?

**Characteristics**

- Made redundant by shift in strategy
- Limited internal/external touchpoints

Work with business leaders to identify employee roles that fit with the characteristics of each talent segment.

**Segmentation priorities:**

- Identify nonleadership strategic and core talent.
- Define requisite roles on which to target cost minimization.
- Identify noncore talent roles that account for significant labor costs.



## Step 5

Define and Measure  
Your Function's  
Objectives

# Step 5: Define and Measure Your Function's Objectives

“Having alignment on paper is meaningless unless you've defined your objectives in a specific, measurable and actionable way.”

Senior vice president, technology company

## Five things to get right in your plan

Armed with information on enterprise strategy and your function's capabilities, strengths and weaknesses, you're ready to define a prioritized list of functional objectives, each with a time horizon of one to two years.

Remember to:

- 1 Review key lessons learned** from previous years to prevent prior strategic errors, such as using off-track assumptions. Check the past performance of the plan against objectives and use benchmarks to avoid making the same mistakes.

- 2 Account for capabilities gaps.** As discussed in step 4, evaluating capabilities and skills is an important and discrete step in the planning process. Make sure a lack of capabilities doesn't derail ambitious growth strategies.
- 3 Have a clear and distinct vision.** Be clear on what defines long-term success (in business, not financial, terms). Use that clarity to inform strategic priorities and make trade-offs easier.
- 4 Align goals with strategic imperatives.** Clearly state the assumptions that underpin strategic goals to demonstrate how achieving specific goals will generate specific outcomes. Without this alignment, execution will likely falter.
- 5 Create a manageable number of performance measures.** Too many metrics (or those with unclear relevance) can create confusion as managers chase metrics that may work at cross purposes. Too few metrics can reduce accountability and drive inaction.

## Define SMART objectives

Zero in on a few (four to seven) initiatives that will directly support strategic business goals. Double-check that each is “SMART” — specific, measurable, actionable, relevant and time-bound.

“The most important thing in aligning your objectives to business goals is the rigor that goes into articulating the objective,” says one senior vice president at a global technology company.



## Step 5

Define and Measure  
Your Function's  
Objectives

### SMART checklist for **your** functional objectives

- ✓ Specific — Does the objective target a specific area for improvement?
- ✓ Measurable — Can progress on the objective be quantified or measured?
- ✓ Actionable — Can this objective be linked to specific actions that employees can take?
- ✓ Relevant — Does the objective improve the business in some way?
- ✓ Time-bound — Is the objective tied to a deadline to ensure a timely completion?

### Reinforce your objectives with an action plan

Specify the sequence of action steps or initiatives required to attain an objective. This will be the primary source of information for how the function's objectives will be executed, monitored, controlled and closed.

The action plan isn't just a rote checklist — it:

- Details interdependencies between different initiatives and functions
- Estimates the types, quantities and costs of resources required to perform an initiative
- Sets roles, responsibilities and accountabilities of employees
- Specifies risks and associated mitigation plans

- Establishes quality standards for different initiatives, metrics to measure progress and course-correction mechanisms to account for deviations

### Checklist for **your** functional action plan

Does your plan clearly:

- ✓ Specify what needs to be done, when and by whom?
- ✓ Detail what resources or inputs are needed?
- ✓ Act as a go-to framework for guidance on the execution of an objective?
- ✓ Explain interdependencies between different initiatives?
- ✓ Specify owners, milestones and metrics to track whether an initiative is on time and within budget?
- ✓ Specify risks that might affect an initiative and steps to mitigate them?

### Select measures to track your progress

To track your progress toward functional objectives, select relevant business outcomes and performance measures. Examples are employee engagement, customer satisfaction, brand awareness or other business objectives.

Your chosen measures must be observable by available data to properly assess business performance. Ultimately, you'll need to prioritize the five best able to serve as indicators of the state of your functional organization — now and in the future.



## Step 5

Define and Measure  
Your Function's  
Objectives

Select only a handful of strategic and outcome-oriented measures. As noted, too few can reduce accountability; too many can create confusion. Ask yourself which of the possible measures best capture what the company wants to achieve and which are practical to track.

### Checklist for **your** functional measures

Do your chosen measures:

- ✓ Consist of significant, observable business outcomes?
- ✓ Align with business strategy?
- ✓ Provide value greater than the cost involved in tracking it?
- ✓ Include a limited number of outcomes so tracking is not too costly or difficult?

### Select metrics to quantify your progress

To quantify the observed changes in a measure over time, use metrics that capture your progress and the overall health of a goal or objective. Metrics must be well-defined and verifiable. Set triggers for any events that might invalidate the plan.

### SMART checklist for **your** functional metrics

- ✓ Specific — Is the metric sufficiently granular for the action it measures?
- ✓ Measurable — Can the metric be measured with reasonable ease and accuracy?

- ✓ Actionable — Does the metric inform decision making?
- ✓ Relevant — Do changes in the value of the metric reflect activity or behavior that's of value to decision makers?
- ✓ Time-bound — Can the metric quantify the progress of a measure by a given deadline (where needed)?

“We soon found that successful execution depended on us connecting metrics at all levels of [our function] to both departmental strategy and organizational strategy. If you don't make it clear to staff how they contribute to functional and organizational success, it is impossible to get their buy-in,” says one functional leader at an insurance company.

### Resources for this step



**Peer example: Create SMART Metrics**



### What to take away from step 5

- A list of high-impact objectives, prioritized according to the strategic plan
- An action plan that stipulates how the objectives will be met, including specific measures to track progress, and metrics that are robust but simple enough to quantify that progress effectively



## Create SMART Metrics

To select the best key performance indicators for your function, focus on activities that you can influence and which directly impact the value your function delivers to the business. This example from the legal function at one major corporation shows that the measures don't have to be sophisticated to tell an impactful story.

Key = Not SMART SMART

### Specific

Each metric should represent a quantifiable value linked to an activity or behavior.

**Ask:** What degree of granularity would best measure the activities that support the function's objectives? Does the metric reference a specific numerical value linked to an activity or behavior?

Client satisfaction

Average client survey on overall legal department effectiveness

### Measurable

Each metric should have a clearly defined system or process that records and retrieves its value.

**Ask:** Is there a reliable way to obtain the value of the metric, not just how informative the measurement will be?

Turnaround time

Hours from request received from client until reply sent by legal department

### Actionable

Measuring each metric should affect behaviors in a predictable way during and/or after measurement. Set numerical goals and results bands (e.g., "close to or exceeding goal" and "far away from goal") so employees and managers have indicators they can understand and respond to, and can gauge their progress by metric.

**Ask:** Will someone who cares about this metric know what to do with the information it provides?

Total outside counsel expenses per \$ billion revenue, with no goal

Total outside counsel expenses per \$ billion revenue, with a goal of 40% (+/- 5%) of total legal expenses per \$ billion revenue

### Relevant

Each metric should measure an activity or behavior of interest to decision makers. Engage business partners to ensure metrics focus on things they care about.

**Ask:** Are there any stakeholders within the business or legal department who care about the behavior or activity the metric measures?

Number of patents filed

Change in cost of maintaining the intellectual property portfolio

### Time-Bound

A metric should be time-bound if you want the related activity/behavior to be completed within a specific time frame.

**Ask:** Should we include a time-related threshold for this metric?

Average time to respond to client requests

Percentage of client requests responded to within 48 hours

Number of legal alerts on emerging risks issued

Percentage of legal alerts on emerging risks issued within one week of identifying risk



## Step 6

Look to Fund  
Innovation and  
Growth

# Step 6: Look to Fund Innovation and Growth

“Instead of directing investments to those who shout the loudest, we use prioritization criteria to bring more objectivity into how we allocate our investments.”

Functional executive, financial services firm

## A plan is just a plan without resources

Strategic growth objectives should be ambitious by definition, but they still have to be funded — with budget, talent and technology. The challenge is how to allocate scarce resources to the most critical initiatives and growth investments.

The first step is to establish a baseline budget to fund existing operations and future needs. Your function may be able to use past activity and estimates to calculate the resources required to

conduct ongoing functional activities and then adjust that historical budget for future requirements. However, many functions and businesses find past budgets to be poor indicators of future needs, especially when pursuing new initiatives to support enterprise digital ambitions.

The historical view can be outdated, and its use as a starting point may limit your budgeting to incremental adjustments without really questioning the need for that spending — or prioritizing critical new objectives.

In budgeting models such as driver-based budgeting (DBB) and zero-based budgeting (ZBB), prior spending choices don't take precedence simply because they existed previously. Such approaches can ensure the budget stays more relevant/closely aligned to business needs/drivers of performance.

Whatever budget model you use, work with subfunctional and business partners to review last year's budgets and resource requirements and take note of variations from plan. Consider ways to cut costs while improving productivity.

## Consider capacity, not just budgets

Although you have to level-set on budgets to gauge future needs, budgets are not the entirety of resource allocation. Your ultimate goal is to ensure that adequate capacity is allocated to support the new growth initiatives that stakeholders have agreed are key to driving enterprise ambitions.



## Step 6

Look to Fund  
Innovation and  
Growth

Be careful not to focus so much on the near-term budget detail that you defer tough choices into the future. Keep a strategic mindset, focused squarely on determining the resources you'll need to execute your plan.

“We realized that we needed to integrate strategic planning and budgeting activities — maintaining the flexibility to change the budget in light of changing external assumptions — but most importantly, to improve the business relevance of the planning,” says a senior executive at a manufacturing company.

### Five steps to better strategic resource allocation

It takes a deliberately strategic mindset to deploy capacity to critical initiatives and deprioritize initiatives with lower strategic importance. To increase your impact, take these five steps:

- 1 Ramp up your strategic decision-making skills.** Focus on funding innovation and growth, not garnering quick wins. Lean on corporate strategists for guidance on frameworks that provide a more strategic view of trade-off decisions. Ask for more transparency into the broader business portfolio, which can clarify trade-offs.
- 2 Remove barriers to strategy execution.** Use your insight into the operational constraints affecting strategy execution to anticipate where execution bottlenecks may occur. Wield your influence over resources to allocate the capacity you need to execute your plan. Work with all stakeholders to eliminate overlapping or redundant work, and make sure underutilized resources are better deployed against unique work.
- 3 Don't forget mental bandwidth is a resource.** Fifty-five percent of employees say they don't have enough time to complete their work. Mitigating that problem can generate a substantial positive impact and improve organizational alignment with strategy. Especially make sure to provide your key managers with the mental time and energy to pursue new innovation and growth initiatives. Also, try to unlock trapped organizational capacity.
- 4 Ensure that resources are allocated appropriately across functions.** This will be easier if you evaluate resource decisions from multiple strategic perspectives. Collaborate with other functions and make sure your subfunctions are collaborating to ensure you agree on the priorities — and that any goal requiring significant cooperation across departments actually appears on all parties' priority lists for budgeting, staffing resources and so on.
- 5 Depoliticize resource trade-off decisions.** Balance the introduction of new priorities and activities with clear direction on what your function must stop doing to preserve resources for growth opportunities. Decisions to terminate projects can be highly political and difficult to make. Remove biases from these decisions to help the organization make more effective trade-offs.



## Step 6

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Look to Fund  
Innovation and  
Growth

### Four ways to depoliticize resource trade-off decisions

Managing trade-offs is often the most challenging part of reallocating resources. To make effective trade-offs that all stakeholders will support, take deliberate steps to reduce the political pressure on resource-allocation decisions:

- 1 Don't use arbitrary decision guidelines.** When targets, triggers or thresholds are used to make decisions to terminate projects and initiatives, arguments can become focused on how the threshold is set and measured, not whether the project supports the strategy. Instead of setting and retaining specific thresholds, monitor the direction of a project's performance. This reduces politicking, as the question of whether performance is improving or declining is less prone to interpretation.
- 2 Provide tangible criteria to assess value.** Identify a finite set of assumptions, conditions or capabilities that must be true for a project to be viable. Get managers and project sponsors to develop and agree on those hurdles themselves — and then make decisions to terminate projects based on those same factors (or business assumptions). When each function defines its own “must be true” assumptions in advance, decision making is objective and fair.

- 3 Don't make relative comparisons between “keep” and “terminate” decisions.** The best way to avoid politics is to make sure you don't choose between “keep” and “terminate” decisions. Base each decision on a defined set of criteria and on its own merits. Decisions become more politically charged when they are made on a relative basis — for example, when subfunction A is flagged as underperforming relative to subfunction B, so subfunction A is scaled back or cut.
- 4 Preserve funding for innovation and growth.** To keep cost management conversations strategic, consider using a framework to categorize the opportunity and risk of your cost optimization decisions.



## Step 6

Look to Fund  
Innovation and  
Growth

### Resources for this step



**How-to guide: Cost Optimization Decision Framework**



**How-to guide: Green-Light Your Best Cost Optimization Initiatives**



### What to take away from step 6

- Rigorous view of your baseline budget — the resources required to conduct all ongoing functional activities based on past estimates and those required for future functional initiatives that are critical to the growth of the business
- A sound plan, anchored in strategic objectives, of the trade-offs your function can make to keep resources moving toward key initiatives. Also make sure to deprioritize funding for less strategically relevant initiatives, and look to better leverage underutilized resources
- A clear understanding of the relative cost, risk, time and benefits of potential cost optimization initiatives



# Cost Optimization Decision Framework

As you look to fund innovation and growth, use this tool to categorize the upside of each cost optimization opportunity and determine if the opportunity is worth the effort.

Potential Financial Benefit	Small	Medium	Large
<ul style="list-style-type: none"> <li>• How much will the function save if the action is implemented?</li> <li>• How does the action affect cash flow?</li> </ul>	Potential to minimally improve cash flow or generate hard/soft savings	Potential to moderately improve cash flow or generate hard/soft savings	Potential to significantly improve cash flow or generate hard/soft savings
Business Impact	Negative	None	Positive
<ul style="list-style-type: none"> <li>• What impact will this initiative have on business-unit leaders?</li> <li>• Will this initiative adversely affect business units' day-to-day activities or operations?</li> </ul>	The initiative will have an adverse impact on business operations	The initiative will have neither a positive nor a negative impact on business operations	The initiative will have a positive impact on business operations
Time Requirement	Long Term	Intermediate Term	Short Term
<ul style="list-style-type: none"> <li>• Can we capture and realize cost savings within this fiscal year?</li> <li>• How do we measure soft savings with this initiative?</li> </ul>	Savings may or may not be realized upon (or within months of) full implementation	Expect savings to be realized within months of full implementation	Expect savings to be realized within weeks of full implementation



## Cost Optimization Decision Framework (continued)

As you look to fund innovation and growth, use this tool to categorize the upside of each cost optimization opportunity and determine if the opportunity is worth the effort.

Degree of Organizational Risk	High	Moderate	Low
<ul style="list-style-type: none"> <li>• Will our business-unit leaders ensure the changes are made?</li> <li>• Is our enterprise capable of adapting to the changes?</li> </ul>	Layoffs and/or re-engineering of processes and structures likely	Limited change in roles, structures and processes	No layoffs or changes in organization and processes expected
Investment Requirement	Long Term	Intermediate Term	Short Term
<ul style="list-style-type: none"> <li>• Does the initiative require a large, upfront investment before savings can be realized?</li> <li>• Is the enterprise willing to make an investment at all?</li> </ul>	Large upfront investment required before savings can be realized	Moderate upfront investment required before savings can be realized	Little to no upfront investment required before savings can be realized

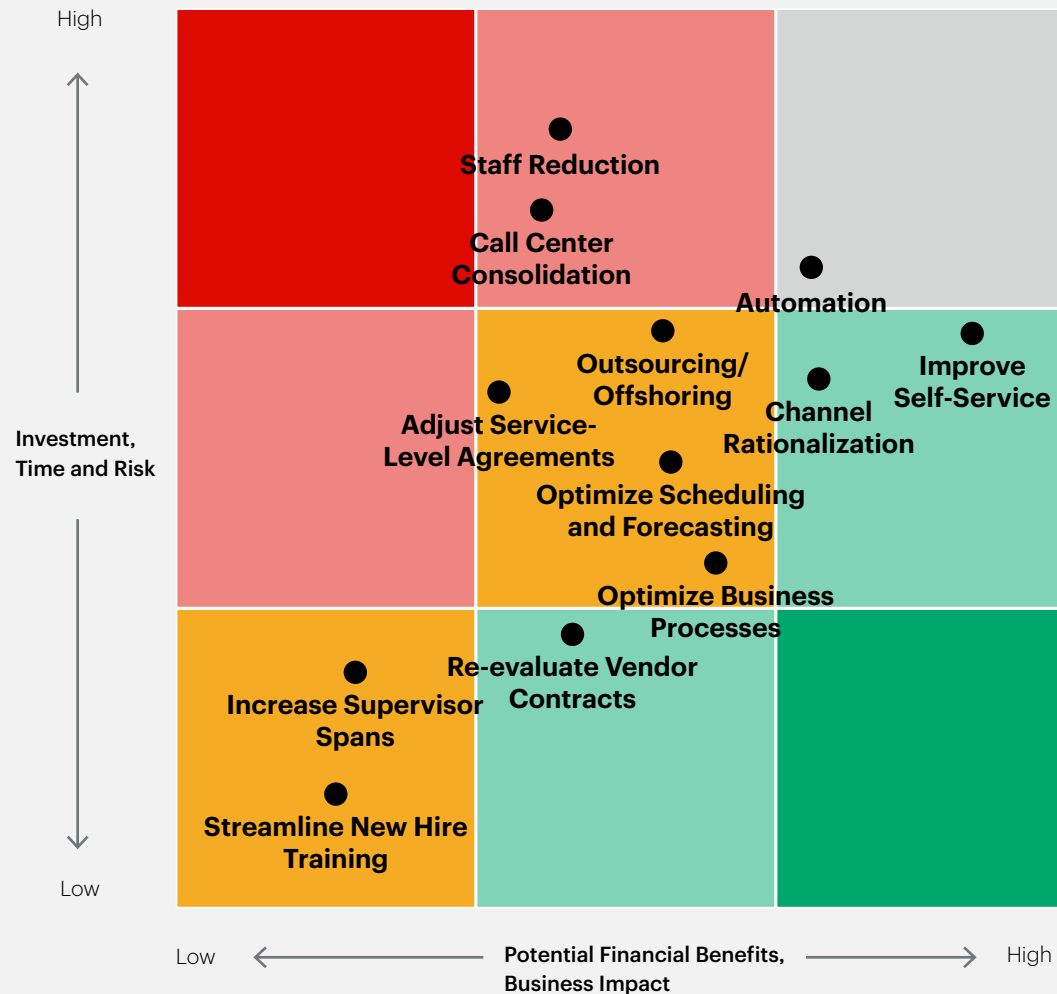


# Green-Light Your Best Cost Optimization Initiatives

After using the decision framework, you can group ideas together and map them to a grid to help your function visualize the effort required and the relative benefits of each initiative.

The mapping of initiatives shown here is only indicative. The perceived investment, risk, time and benefits depend highly on the function's maturity and the organization's industry and size. Every company will have a different outcome when assessing these cost optimization initiatives.

## Map your cost optimization initiatives and visualize trade-offs



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“Having a partner like Gartner helps you understand what your maturity level is, and that really helps you in building your own strategy and three-year plan.”

Executive director, global beverages company

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**For part three — including the Strategy on a Page template — please [contact us](#) and one of our team will be in touch.**

