



# Marketing Investment Management

## Take Control of Marketing's Investments

With one of the largest discretionary budgets in the organization, marketers have great responsibility--they must show the business they are responsible stewards of the company's dollars. They need to know how much to invest, how much has been spent so far, where and when it has been spent, and how much is left. If they can't answer these simple questions, they're flying blind and will lose the confidence of C-level executives.

“CMOs need to assure the board that marketing budgets do not become a black box activity. Without concrete analysis, trust erodes.”

- DELOITTE



## Challenges

**Lack of visibility.** With marketing spend scattered across spreadsheets, emails, and files in random locations, marketers struggle to see how much money is being spent, where it is being spent, and when it will hit the books.

“Half of CMOs don't understand how their budgets are invested.”

- GARTNER

**Conflicting process.** Marketers spend hours managing budgets and invoices and finance teams tend to organize budget and spend in ways that marketers don't understand and can't relate to.

**No control over budget.** Getting a real-time view of forecasted investment versus actual spend is nearly impossible. Marketers fail to make intelligent budget decisions.

“80% of marketers need to adjust or re-evaluate spend changes throughout the year”

- NIELSEN

**Missing the target.** Without accurate numbers, marketers tend to overspend, underspend, or spend at the wrong time.

**Lack of trust.** Marketing runs into unexpected expenses and incorrect reconciliation and amortization. With lack of confidence that marketers are good stewards of their dollars, budget approval is at risk.



## The Solution

Allocadia enables marketers to take control of and have confidence in their budget by easily tracking and managing budgets and spend in one place.

- View how much is planned to spend, where and when it will be spent, how much has been spent so far, and how much is left.
- Get the pulse of the marketing budget by visualizing planned spend vs forecasted spend, and forecasted spend vs actual spend.
- Enable marketers to manage spend within the same budget without worrying about version control issues, formula errors, or other spreadsheet headaches.
- See spend by product, funnel stage, region, or any other view at any time.
- Streamline purchase order creation by sending a request from Allocadia to the finance team with all the required information.
- Automate financial data flowing into Allocadia from finance systems and simplify the reconciliation process.
- Ensure that purchase orders are tied to marketing line items and that no invoices go missing.
- Compare open purchase order amounts with how much money has already been spent.
- Track over- or under-spend for each budget line item, program, and department.
- Quickly view the marketing investment mix – target versus forecast versus spend – and course correct as needed.
- Tag any budget line item as forecasted, committed, or occurred, and create reports to visualize them.
- Build dashboards and reports for marketers, the finance team, and executives.

“Before Allocadia, we couldn’t answer the question ‘How much did we spend on demand generation in a specific region?’ within a day. Now, we can.”

- CHETHAN CHANDRA, FORMER SENIOR MANAGER OF BUSINESS OPERATIONS AT VMWARE.



## Key Benefits

**Escape from spreadsheet chaos.** Get marketing spend data in one place and keep it up to date without manual processes and unnecessary data entry.

“In terms of managing our budgets, we’ve reduced the amount of manual input by 66%.”

- DAVID COHEN, VP BUSINESS PLANNING AT PALO ALTO NETWORKS

**One view of the investment.** Give both the marketing and finance departments an overview of everything that is happening with the marketing investment. Information is power and allows for better decisions.

**Simplify financial management.** Translate complex financial processes—purchase reconciliation, purchase orders, invoices, and accruals—into a language that marketers speak. Connect the way finance tracks spend with the way marketers build their budgets.

“Allocadia is very straightforward to submit purchase orders and tying all spend back together.”

- NICK MILLER, PROJECT MANAGER, RELATIONSHIP MARKETING AT VMWARE

**Take control over the budget.** Ensure spend information is accurate and eliminate the end-of-quarter scrambling to spend or shift money around.

**Make smarter and faster decisions.** Track spend in real time and make course corrections.

**Do the job you were hired for.** Spend more time marketing and less time wrangling with financial numbers.

**Build a great relationship with Finance.** Marketers no longer have to pester Finance about random GL codes or how to submit a purchase order correctly. Finance trusts that marketers know what they’re doing.

**Create transparency.** Centralize budget management and provide visibility into how marketing is investing the company’s dollars.

**Raise forecast accuracy.** Consistently come within 1% of budget targets and build confidence in how marketing runs its business.

**Get a confident “I.”** Build an accurate data source around marketing investments—the “I” in ROI—and set your organization up to measure ROI accurately.