



Reduce risk & get accurate answers about your marketing spend in seconds

Allocadia Budget Management & Strategic Planning Platform



88% of financial marketers stated budget constraints were a major to moderate challenge¹

Marketing budgets make up 9.2%² of revenues in the financial services sector; thus, knowing where every dollar is going and how it's contributing to drive larger wallet share with customers is essential.

There is a better way

Allocadia provides financial services firms—from banking, payment processors to insurance— with real-time visibility into marketing spend, so you can answer your CFO's questions with greater confidence and in a matter of clicks. Our platform allows marketers to quickly answer where money is being invested, track forecasts, import actuals and provides reports on the impact from initiatives. This allows your team to capitalize on both business and client opportunities faster, better rationalize budget trade-offs, and maximize every marketing dollar spent.

Allocadia customers have seen:

50+%

Reduction in time spent reconciling budgets

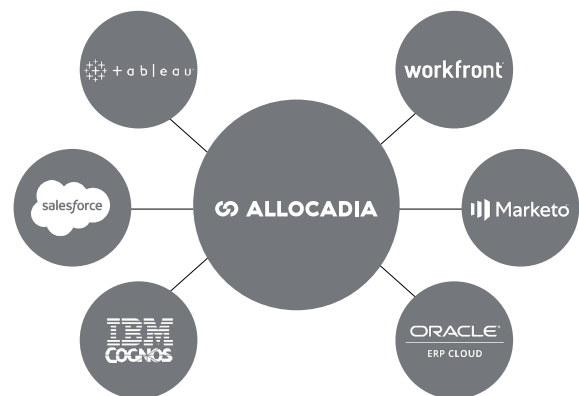
100%

Alignment to corporate goals

99%

Greater budget accuracy

Seamlessly integrates with the tools you love to automate data flows and facilitate more informed decisions



Allocadia has more integrations available and you can find the complete list at allocadia.com/connect

Success Story:

Charles Schwab's marketing department has a large and dynamic budget that is widely distributed across 100+ cost centers and numerous managers. They realized their outdated spreadsheet system was no longer working for them, or their tight target spend of $\pm 0.5\%$. They selected Allocadia's budget management and strategic planning platform for better spend visibility and on-demand analytics.

Since implementing Allocadia, and integrating Workfront into their tech stack, the team now benefits from a simpler, faster, and streamlined process for budget management that allows them to pull reports on who hasn't updated their plan or has more than a 10% variance in approved spend.

“Our marketers have become more accountable and better stewards of the dollars allocated to them. We can show progress and results in real time.”

Charles Schwab executive in charge of marketing technology

charles
SCHWAB



Easily create and manage agile budgets and plans

Gain full visibility into what's been forecasted, already spent, and remaining in budget, so you can pivot faster with changing customers needs and test more personalized experiences.



View marketing spend across multiple dimensions

Filter investment data by objective, stage in the client journey, product line, region, persona, and activity type. Systematically re-allocate funds for the best possible use of your budget.



Optimize your marketing budget with actionable insights

No more waiting until the end of the month or quarter to re-allocate spend. With investment performance insights, you can see what's working and not, and easily shift budget to the highest performing initiatives.



Visualize impact before taking action

During the investment planning stage, you can create various “what-if” scenarios to help you anticipate and prepare for how your team would adapt to changes in budget such as receiving a 10% increase.



Save time with automated finance & marketing reports

Receive automated and customizable reports so you can monitor how close actual marketing spend is to what's been forecasted.

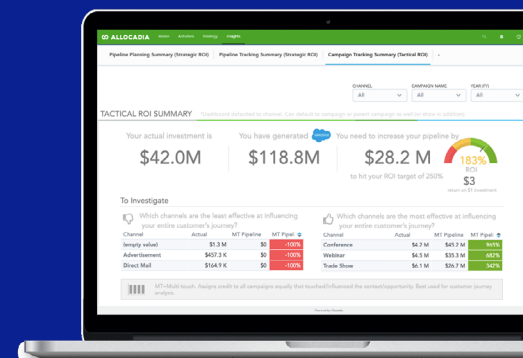


Mitigate business risk

Our security, privacy, and resiliency assurance programs are aligned to international standards and adhere to your governance policies.

Want to know how **16,000+** marketers are effectively managing budgets and making data-driven investment decisions? Contact us today for a live demo sales@allocadia.com

Toll free: **1.866.684.0935**



¹ The Financial Brand, “COVID Forcing Major Changes to Bank Marketing in 2021 (and Beyond)”, 2021.

² WebStrategies, “How Much Should You Budget For Marketing In 2021?”, November 2020.