

SPIN – 10 Minute Madness

Topic: Strategic Budgeting



Presenter: Alan Mace

Strategic Project Office

(212) 657-1857

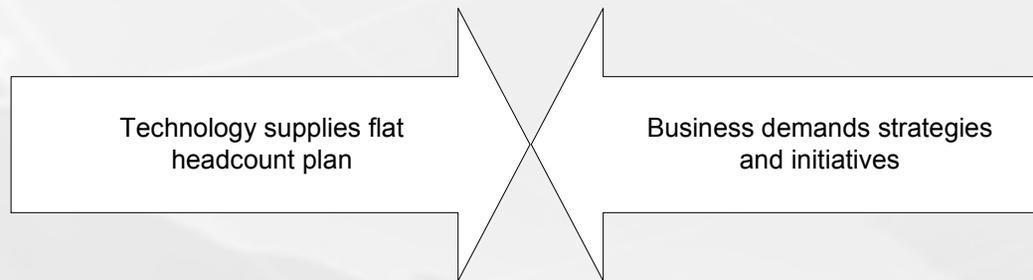
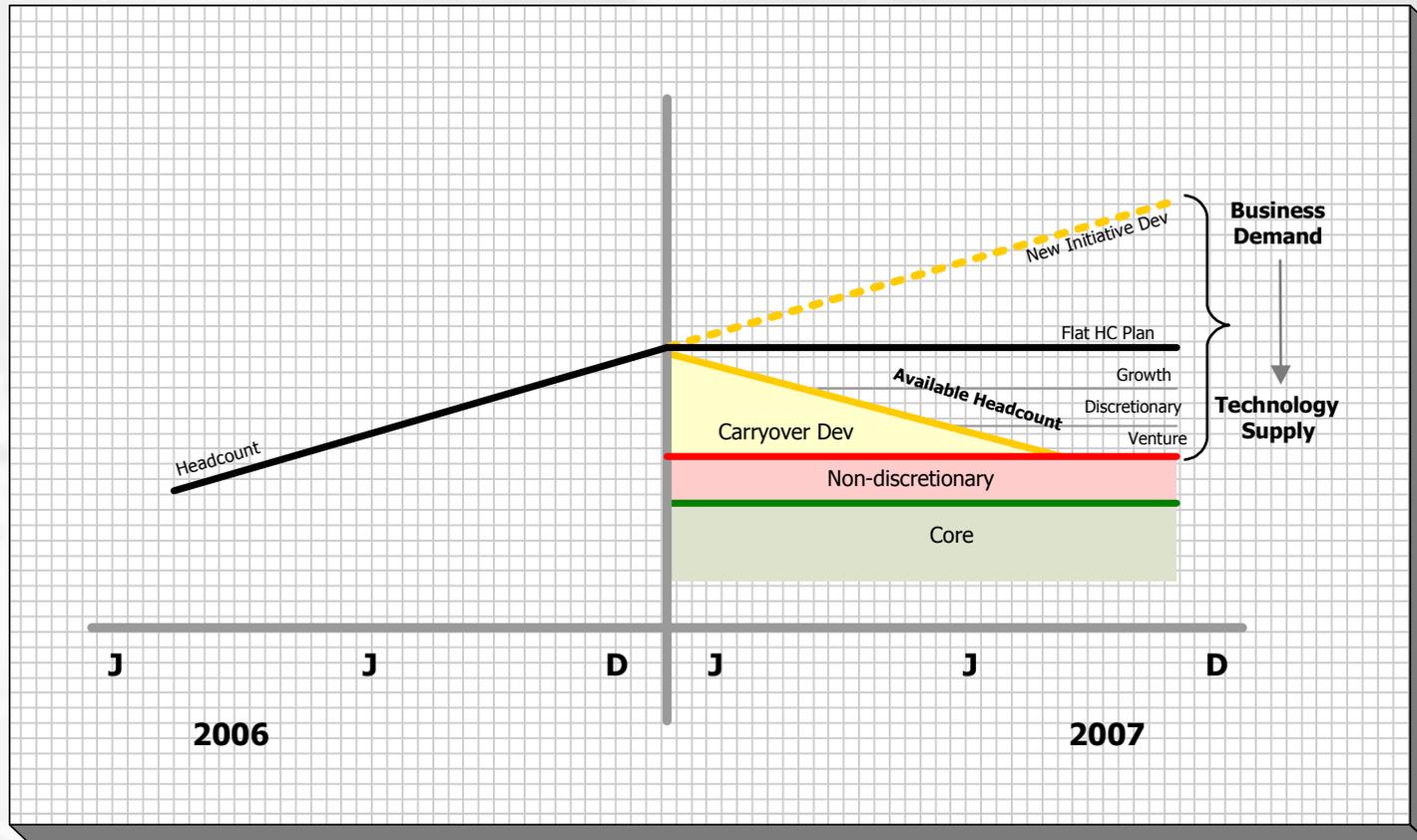
alan.r.mace@citigroup.com



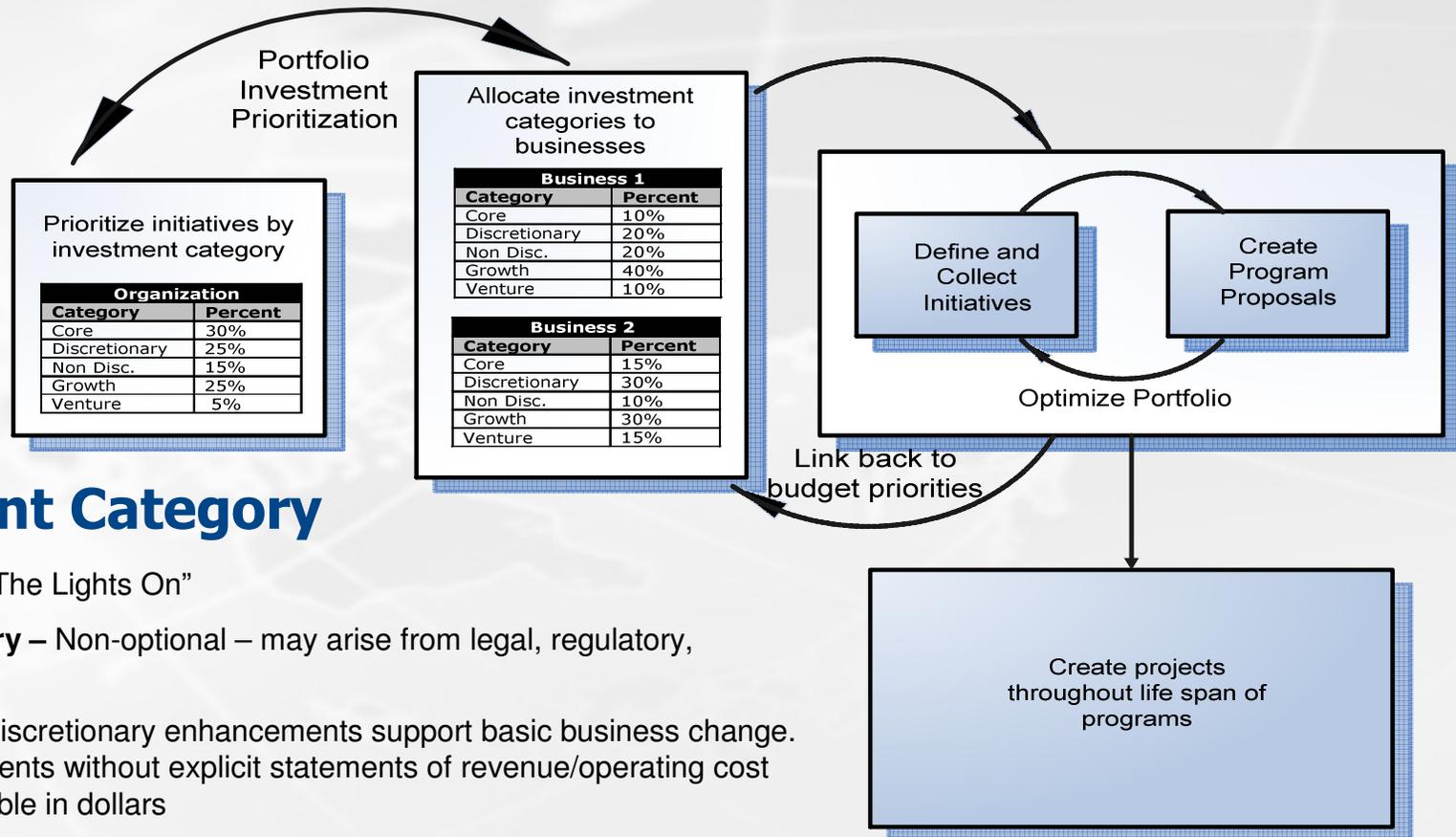
Overview

- ▶ **Supply/Demand Convergence**
- ▶ **Strategic Investment Portfolio**
- ▶ **Project Portfolio Prioritization**
- ▶ **Top Down Budget Model**
- ▶ **Budget Example**
- ▶ **Questions**

Supply/Demand Convergence



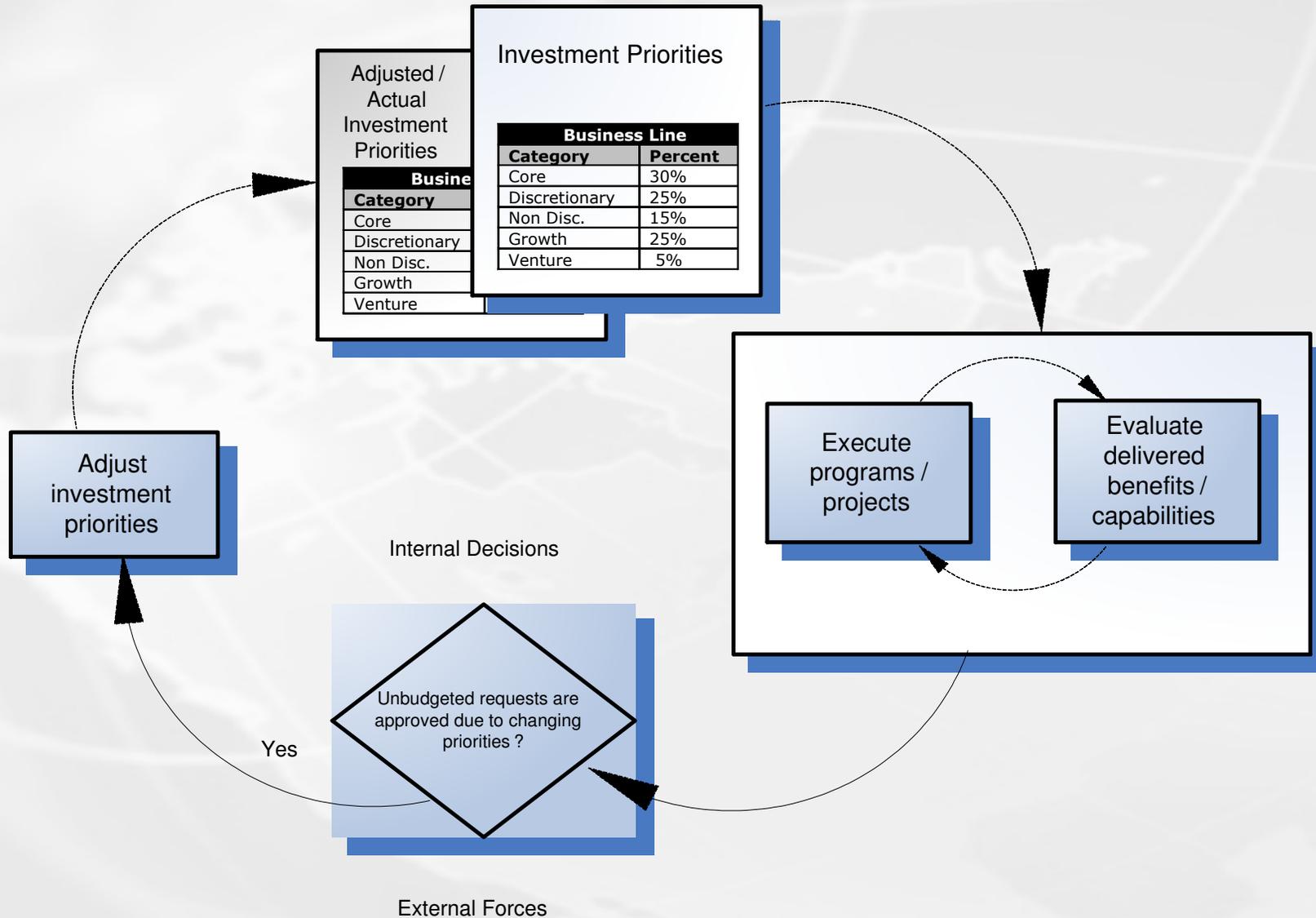
Strategic Investment Portfolio



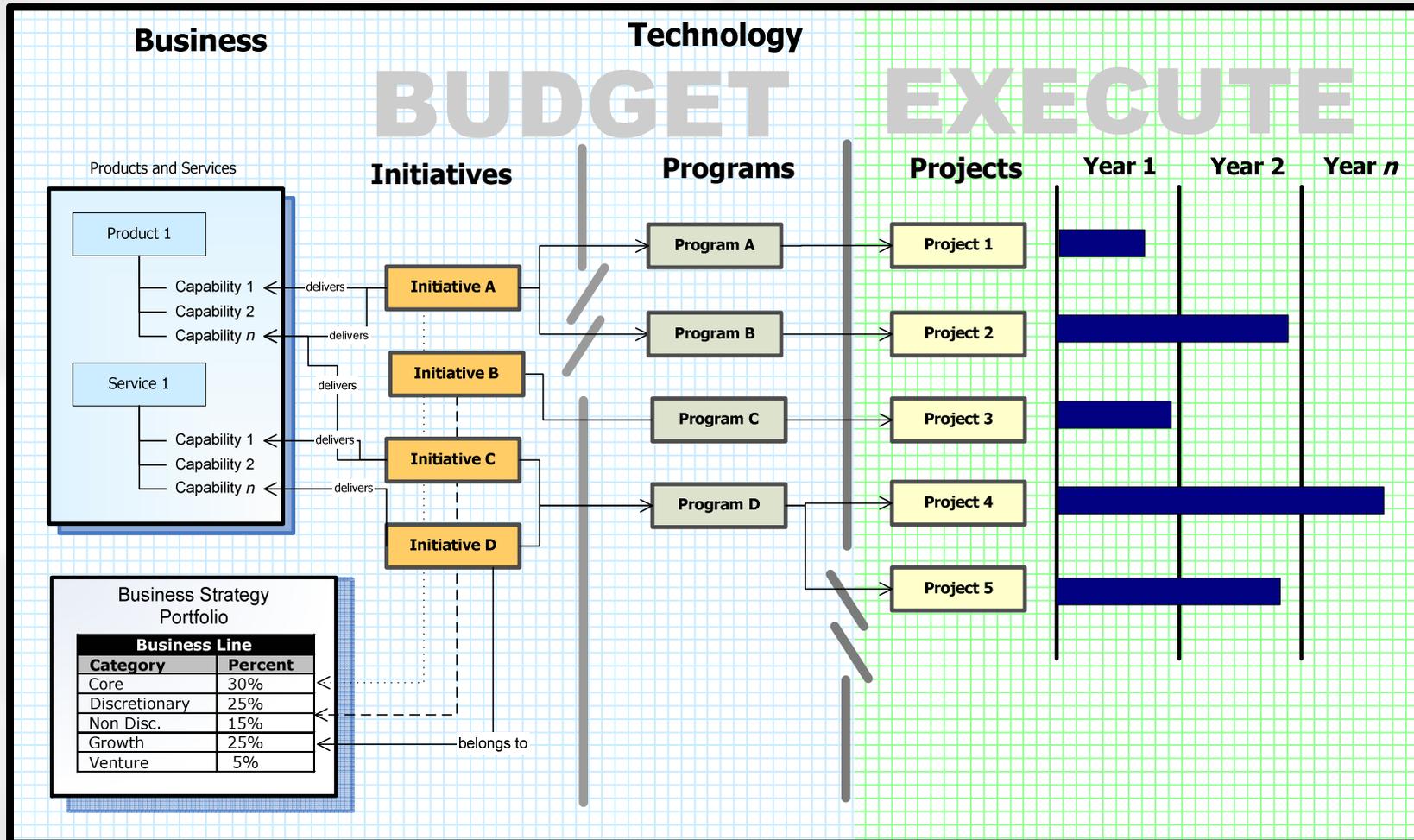
Investment Category

- **Core** – “Keeping The Lights On”
- **Non-Discretionary** – Non-optional – may arise from legal, regulatory, compliance
- **Discretionary** - Discretionary enhancements support basic business change. Optional enhancements without explicit statements of revenue/operating cost reductions expressible in dollars
- **Growth** - Supporting competitive differentiation to deepen market penetration. Have demonstrable and quantifiable business benefit. Explicit statements of revenue/reductions in operating cost expressed in
- **Venture** - Supporting massive innovation to broaden reach into new markets.

Project Portfolio Prioritization

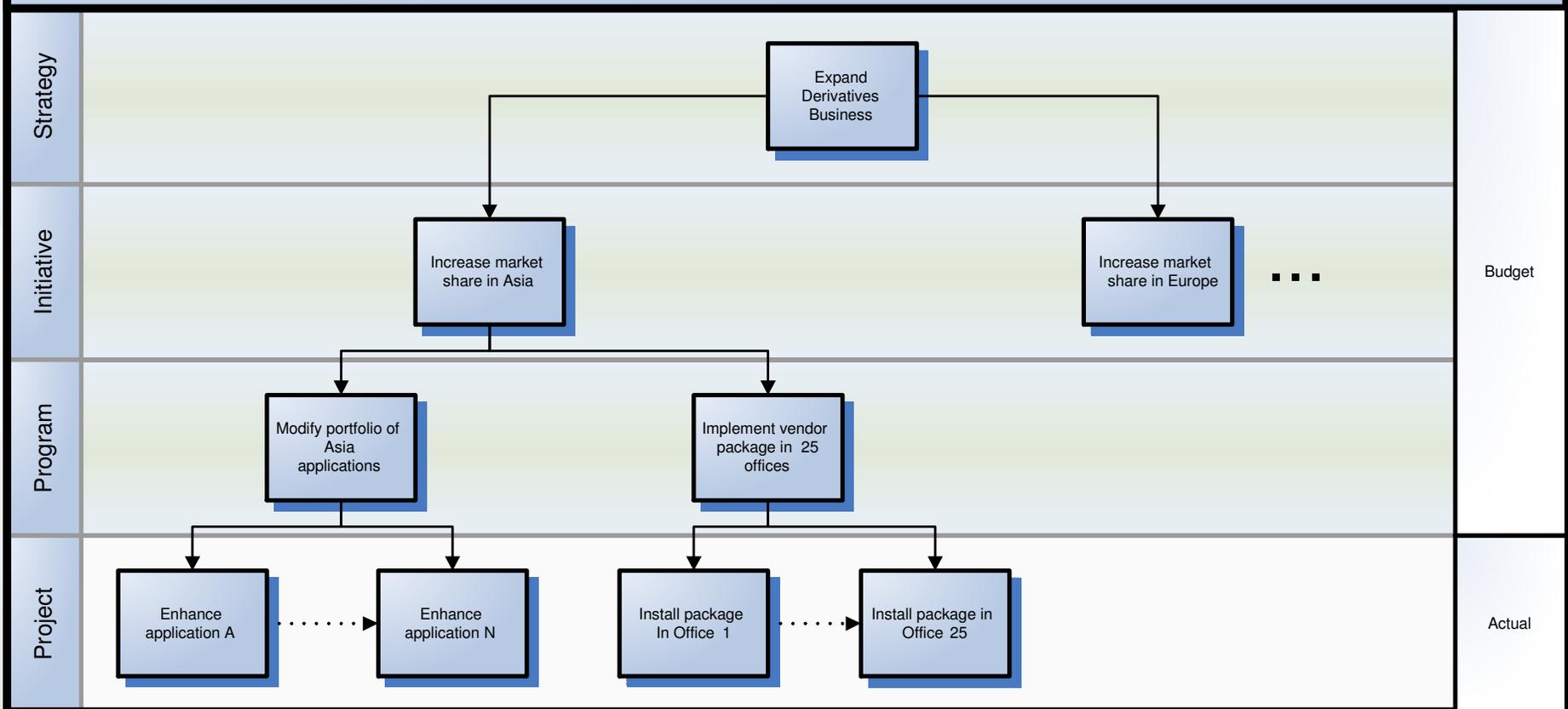


Top Down Budget Model



Budget Example

Top Down Budget – Eliminate unnecessary granular project detail



Questions

