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Business capability heat map

What the organisation must be able to do, rated red, amber or green for current performance, with the target maturity each capability should reach shown in purple. A fictional mid-sized services organisation, not client data.

Green: performing well · Amber: needs attention · Red: critical gap · → 4 Purple: target maturity (where it should be) · Purple dashed: new capability needed · **M2** current maturity (1 to 5) · [S] Strategic [C] Core [P] Supporting

Strategy & planning	Customer management	Product & service	Sales & marketing	Operations & delivery	Finance	People	Data, technology & risk
Strategic planning [S] M2 → 4	Customer insight [S] M1 → 4	Product design [S] M4 → 4	Campaign management [S] M3 → 3	Demand planning [C] M1 → 4	Billing & invoicing [C] M2 → 4	Workforce planning [S] M2 → 3	Data management [S] M1 → 4
Portfolio management [S] M1 → 4	Customer onboarding [C] M1 → 4	Pricing [S] M2 → 4	Lead management [C] M2 → 3	Order management [C] M2 → 4	Payments [C] M4 → 4	Learning & development [S] M1 → 4	Application management [S] M2 → 3
Enterprise architecture [S] M2 → 4	Relationship management [C] M3 → 4	Service catalogue [C] M3 → 3	Quoting & proposals [C] M1 → 4	Fulfilment [C] M3 → 4	Financial planning [S] M3 → 3	Knowledge management [S] M1 → 4	Information security [C] M3 → 4
Performance management [C] M3 → 4	Complaints handling [C] M2 → 3	Partner management [S] M2 → 3	Sales forecasting [C] M2 → 3	Supplier management [S] M3 → 3	Management reporting [S] M2 → 4	Recruitment [S] M3 → 3	Risk & compliance [C] M3 → 4
	Digital self-service [S] New → 3						AI governance [S] New → 3

How to read it

Colour shows how well a capability performs today. The purple number is the maturity it needs to reach to deliver the strategy. The bigger the gap on a red, strategic capability, the higher its priority.

What it shows here

Onboarding, customer insight, demand planning, knowledge and data management are red and well below target, while product design, payments and fulfilment are sound. Two new capabilities, AI governance and digital self-service, are needed.

What happens next

Each red capability is broken down to level 3 with an owner and maturity (page 2), then traced through process, data, applications and technology into a roadmap (page 3).

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Capability map to level 3

The red capabilities from the heat map, broken down from level 1 domain to level 3, with an accountable owner, current and target maturity, capability type and RAG status.

LEVEL 1 · DOMAIN	LEVEL 2 · CAPABILITY	LEVEL 3 · CAPABILITY	OWNER	MATURITY: NOW → TARGET	TYPE	RAG
Customer management	**Customer onboarding** Owner: Head of Customer Operations	Application capture	Sales Operations Lead	2 → 4	Core	amber
		Identity & credit checks	Risk Manager	1 → 4	Core	red
		Contract & terms agreement	Legal Counsel	3 → 3	Supporting	green
		Account set-up	Customer Operations Lead	1 → 4	Core	red
		Welcome & first service	Service Delivery Manager	2 → 4	Strategic	amber
	Customer insight Owner: Chief Marketing Officer	Customer data collection	Data Owner, Customer	1 → 4	Strategic	red
		Segmentation & analysis	Insight Manager	2 → 4	Strategic	amber
		Voice of the customer	Customer Experience Lead	2 → 3	Core	amber
Operations & delivery	**Demand planning** Owner: Head of Operations	Demand forecasting	Planning Manager	1 → 4	Core	red
		Sales & operations planning (S&OP)	Operations Director	1 → 4	Strategic	red
		Capacity planning	Delivery Manager	2 → 3	Core	amber
People	**Knowledge management** Owner: Chief People Officer	Knowledge capture	Practice Leads	1 → 4	Strategic	red
		Content curation & review	Knowledge Manager	1 → 3	Core	red
		Knowledge search & access	IT Service Manager	2 → 4	Supporting	amber
Data, technology & risk	**Data management** Owner: Chief Data Officer	Data ownership & stewardship	Chief Data Officer	1 → 4	Strategic	red
		Master & reference data	Data Architect	1 → 4	Core	red
		Data quality management	Data Quality Lead	2 → 4	Core	amber
		Data protection & privacy	Data Protection Officer	3 → 4	Core	green

Capability levels

Level 1 is a broad business domain. **Level 2** is a capability within it. **Level 3** is specific enough to assign an owner, measure and improve. Capabilities describe *what* the business does, not how or who.

Ownership

Every capability has one accountable owner in the business, not in IT. The owner agrees the target, approves change and answers for performance. A capability without an owner is itself a finding.

Maturity scale

1 Initial: ad hoc, depends on individuals. **2 Repeatable:** some routine, not standard. **3 Defined:** documented and consistent. **4 Managed:** measured and controlled. **5 Optimised:** continuously improved. The **purple ring** marks the target.

Capability type

Strategic: sets you apart; invest to lead. **Core:** essential to deliver your service; must be reliable and efficient. **Supporting:** needed but not differentiating; standardise, share or outsource.

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Capability cross-map and roadmap

Business architecture shows what must change; enterprise architecture shows where. Each critical capability is traced through every layer, then sequenced into waves.

CAPABILITY	PROCESS: WHAT WE FOUND	DATA: WHAT WE FOUND	APPLICATIONS: WHAT WE FOUND	RECOMMENDATION
Customer onboarding	Collect details, run checks, open account in sequence	Client record held in three places; no single owner	CRM, onboarding portal and core system not integrated	**Wave 1: one client record, parallel checks, named journey owner**
Demand planning	Monthly plan rebuilt in spreadsheets	Stock and lead-time data out of date	Planning tool cannot see live orders	**Wave 1: single demand plan and S&OP cycle; Wave 2: connect order and stock data**
Knowledge management	Guidance scattered across inboxes and drives	No owner or review date for guidance	No searchable home for guidance	**Wave 2: owned knowledge base; Wave 3: approved AI assistant on curated content**
Data management	Definitions differ between teams	No data owners; reports disagree	Duplicate data stores across systems	**Wave 1: data owners and definitions; Wave 2: master data for client and product**
Customer insight	Feedback gathered but not analysed	Customer data incomplete and unsegmented	Survey and CRM data held apart	**Wave 2: segmentation and voice-of-customer routine on the single client record**

Wave 1 · 0 to 3 months

Name owners for client and product data, agree definitions, redesign onboarding and start a monthly planning cycle.

Wave 2 · 3 to 9 months

Integrate CRM, onboarding and core systems; connect order and stock data; launch an owned knowledge base.

Wave 3 · 9 to 18 months

Add automation and an approved AI assistant where the foundations now support them, with guardrails and measured value.

Layers traced

Each capability is traced through people, organisation, process, information and data, applications and technology, with governance across them, so the recommendation fixes the real constraint, not a symptom.

Critical dependencies

- Data owners named before the single client record
- Single client record before onboarding automation
- Owned, curated content before any AI assistant

How progress is measured

- Maturity reassessed against the purple targets at each wave
- Days from signed deal to live account
- Forecast accuracy and reporting consistency