



# Sierra Technology Solutions: Customer Service 2008 Strategic Plan

As of July 11, 2008

## ***Mission Statement***

The mission of Sierra Technology Solutions is to create technology solutions for forward-thinking organizations.

## ***Vision***

To be known as the technology experts and resource center for small to medium-sized organizations.

## ***Core Values***

### **Our Guiding Principles are:**

- To empower and inspire to entrepreneurial leaders.
- To be professional in our actions to our clients, partners, and each other.
- To effectively impact the marketplace.
- To help all organizations regardless of their resource constraints.
- To have honesty, integrity and respect for all individuals.
- To continually pursue knowledge and learn.
- To practice what we teach.
- To have enjoyment and fulfillment in our work.

## ***Competitive Advantage***

- Access to University - knowledge base, academic resources, proven material and top students.
- Business Network - domestic and international
- Patented Intellectual Property - interactive, integrated web-based
- Software Systems - usable, practical, actionable offerings
- Unique Team - complimentary talents/gifts; business/teaching; international experience

## ***Organization-wide Strategies***

- 2007 - Lay the foundation for the organization.
- 2008 - Prepare the organization for high growth through infrastructure development and training.
- 2009 - Execute a market penetration strategy to increase our top line.

# ***Financial Strategic Objectives & Corporate Goals***

## **Strategic Objective**

**1 Revenue Growth: Grow business 40% per year.**

## **Strategic Objective**

**2 Productivity Improvement: Maintain an acceptable ROI on all projects.**

# Customer Strategic Objectives & Corporate Goals

## Strategic Objective

### 3 New Customers: Increase new customer base.

**Corporate Goal:**3.1 Obtain one new client per day who has purchased Basic Package. (12-31-2008) (Customer Service)

**Measure:**# of Basic Packages

**Target:**30

**% Complete/ YTD**  
19

**Status/ Variance:**  
-11

| Department Goals   | Person Responsible | Start Date | End Date   | % Complete/ YTD | Status/ Variance |
|--|--------------------|------------|------------|-----------------|------------------|
| 3.1.1 Explore and research habits of new customers to determine how best to deliver. | Customer Service   | 6-1-2008   | 12-31-2008 | 100 %           |                  |
| 3.1.2 Increase web traffic by 100%.  | Customer Service   | 1-1-2008   | 6-1-2008   | 25 %            |                  |

**Corporate Goal:**3.2 Develop understanding of technological issues. (9-30-2008) (Customer Service)

**Measure:**% complete

**Target:**100%

**% Complete/ YTD**  
55%

**Status/ Variance:**  
-45%

| Department Goals  | Person Responsible | Start Date | End Date   | % Complete/ YTD | Status/ Variance |
|---|--------------------|------------|------------|-----------------|------------------|
| 3.2.1 Send email blast to existing customers to explore their unique requirements new software solutions. | Customer Service   | 7-31-2008  | 12-31-2008 | 10 %            |                  |

| Team Member Goals   | Person Responsible | Start Date | End Date   | % Complete/ YTD | Status/ Variance |
|---|--------------------|------------|------------|-----------------|------------------|
| 3.1.1.1 Compile names and industries of new customers to study. |                    | 6-1-2008   | 11-28-2008 | 100 %           |                  |

| Team Member Goals                     | Person Responsible | Start Date | End Date  | % Complete/ YTD | Status/ Variance |
|---------------------------------------|--------------------|------------|-----------|-----------------|------------------|
| 3.2.1.1 Compile current customer list |                    | 5-26-2008  | 9-30-2008 | 0 %             |                  |

**Strategic Objective**

**4 Current Customers: Retain current customer base.**

**Corporate Goal:**4.1 Obtain 4 new clients per month who have purchased Premium Software package. (8-31-2008) (Customer Service)      **Measure:**# of Premium Packages      **Target:**4      **% Complete/ YTD** 0 %      **Status/ Variance:**

| Department Goals   | Person Responsible | Start Date | End Date  | % Complete/ YTD | Status/ Variance |
|--|--------------------|------------|-----------|-----------------|------------------|
| 4.1.1 Do email blast to current customers to explore their commitment of resources and time. | Customer Service   | 7-1-2007   | 7-29-2008 | 100 %           |                  |

**Corporate Goal:**4.2 To provide increased value to all existing online customers to enhance "stickiness." (9-15-2008) (Customer Service)      **Measure:** Retention rate of current customers      **Target:**65%      **% Complete/ YTD** 0 %      **Status/ Variance:**

| Department Goals  | Person Responsible | Start Date | End Date  | % Complete/ YTD | Status/ Variance |
|---|--------------------|------------|-----------|-----------------|------------------|
| 4.2.1 Hold online focus group to explore pricing and value of Premium package | Customer Service   | 1-1-2007   | 6-30-2008 | 50 %            |                  |

| Team Member Goals   | Person Responsible | Start Date | End Date | % Complete/ YTD | Status/ Variance |
|---|--------------------|------------|----------|-----------------|------------------|
| 4.1.1.1 Compile names and email addresses of current customers from Premium Software package new customer list. | Randall Scion      |            | 6-1-2008 | 0 %             |                  |

| Team Member Goals                                       | Person Responsible | Start Date | End Date  | % Complete/ YTD | Status/ Variance |
|---|--------------------|------------|-----------|-----------------|------------------|
| 4.2.1.1 Organize participants for the first focus group | Sue Smith          | 2-8-2007   | 3-31-2008 | 100 %           |                  |
| 4.2.1.2 Complete a competitive pricing analysis         | Mikey Hougland     | 2-8-2008   | 3-19-2008 | 0 %             |                  |

# Programs Strategic Objectives & Corporate Goals

## Strategic Objective

**5 Product Management: All web-based strategic planning sites and supporting products meet operational excellence guidelines**

**Corporate Goal:**5.1 To develop webinars (9-30-2008) (IT Group)

**Measure:**# of webinars per month

**Target:**4

**% Complete/ YTD**  
0 %

**Status/ Variance:**

| Department Goals                                     | Person Responsible | Start Date | End Date  | % Complete/ YTD | Status/ Variance |
|--|--------------------|------------|-----------|-----------------|------------------|
| 5.1.1 Develop 15 minute "Basic Package" presentation | Customer Service   | 1-1-2008   | 3-31-2008 | 10 %            |                  |

**Corporate Goal:**5.2 Update software "how-to" books. (11-30-2008) (Customer Service)

**Measure:**# of books updated

**Target:**3

**% Complete/ YTD**  
0 %

**Status/ Variance:**

| Department Goals   | Person Responsible | Start Date | End Date   | % Complete/ YTD | Status/ Variance |
|--|--------------------|------------|------------|-----------------|------------------|
| 5.2.1 Accumulate and synthesize all corrections and revisions for books. | Customer Service   | 1-1-2008   | 9-30-2008  | 0 %             |                  |
| 5.2.2 Hire editor/writer for updates.                                    | Customer Service   | 1-1-2008   | 9-30-2008  | 0 %             |                  |
| 5.2.3 Increase sales by...   | Customer Service   | 1-1-2008   | 12-31-2008 | 0 %             |                  |

**Corporate Goal:**5.4 To finalize New Software Plan with summary statistic pages (6-30-2008) (Web Specialists)

**Measure:**% complete

**Target:**100%

**% Complete/ YTD**  
0 %

**Status/ Variance:**

| Department Goals                                    | Person Responsible | Start Date | End Date  | % Complete/ YTD | Status/ Variance |
|---|--------------------|------------|-----------|-----------------|------------------|
| 5.4.1 Develop quantitative basis for all benchmarks | Customer Service   | 1-1-2008   | 6-30-2008 | 0 %             |                  |

| Team Member Goals  | Person Responsible | Start Date | End Date  | % Complete/ YTD | Status/ Variance |
|--|--------------------|------------|-----------|-----------------|------------------|
| 5.1.1.1 Review existing presentations format for consistency | Sue Smith          | 7-1-2008   | 7-31-2008 | 30 %            |                  |

| Team Member Goals  | Person Responsible | Start Date | End Date   | % Complete/<br>YTD | Status/<br>Variance   |
|--|--------------------|------------|------------|--------------------|---|
| 5.2.1.1 Gather corrections and revisions for books from each department head |                    |            | 5-1-2008   | 0 %                |  |
| Team Member Goals  | Person Responsible | Start Date | End Date   | % Complete/<br>YTD | Status/<br>Variance   |
| 5.2.2.1 Review resumes on file   | Sue Smith          | 2-8-2008   | 12-22-2008 | 100 %              |  |

**Strategic Objective**

**6 Operations Management: Develop and maintain an infrastructure that allows for a virtual office and efficient overhead.**

**Corporate Goal:**6.1 Set up computers to be accessed from any destination. (12-31-2008) (Customer Service)

**Measure:**# of computers

**Target:**5

% Complete/  
YTD  
0 %

**Status/  
Variance:**  


**Strategic Objective**

**7 Technology Management: Continue to develop technology innovation.**

**Strategic Objective**

**8 Community Involvement: Establish a program that contributes 10% of net profit and staff time.**

**Strategic Objective**

**9 Customer Management: Execute and maintain a CRM process that is producing results**

# People Strategic Objectives & Corporate Goals

## Strategic Objective

**10 Training: Continue to learn and adopt best practices about strategy and strategic planning.**

## Strategic Objective


**11 People: To be the employer of choice in our field.**



**Corporate Goal:** 11.2 To support individual staff personal development plans. (7-31-2008) (Administration)

**Measure:** % of staff with plans.

**Target:** 100%

**% Complete/ YTD**  
0 %

**Status/ Variance:**  


| Department Goals  | Person Responsible | Start Date | End Date  | % Complete/ YTD | Status/ Variance  |
|---|--------------------|------------|-----------|-----------------|---|
| 11.2.1 Research facilitation training programs.           | Customer Service   | 1-1-2008   | 6-30-2008 | 0 %             |   |
| 11.2.2 Have all staff complete a 3 year development plan. | Customer Service   | 1-1-2008   | 7-31-2008 | 0 %             |  |

| Team Member Goals                                     | Person Responsible | Start Date | End Date  | % Complete/ YTD | Status/ Variance  |
|---|--------------------|------------|-----------|-----------------|---|
| 11.2.2.1 Create sample development plan for reference | Mikey Hougland     | 2-8-2008   | 2-22-2008 | 0 %             |  |

## Strategic Objective

**12 Culture: To align incentives and employee rewards with staff performance.**



**Corporate Goal:** 12.1 Increase the number of innovative ideas through an incentive program. (9-30-2008) (Administration)

**Measure:** # of innovative ideas implemented.



**Target:** 5

**% Complete/ YTD**  
0 %

**Status/ Variance:**  


| Department Goals   | Person Responsible | Start Date | End Date  | % Complete/<br>YTD | Status/<br>Variance   |
|--|--------------------|------------|-----------|--------------------|---|
| 12.1.1 Develop a program to encourage ideas from everyone. | Customer Service   | 1-1-2008   | 9-30-2008 | 0 %                |  |
| 12.1.2 Throw a party to kick off incentive program.        | Customer Service   | 1-1-2008   | 9-30-2008 | 0 %                |  |

| Team Member Goals  | Person Responsible | Start Date | End Date | % Complete/<br>YTD | Status/<br>Variance   |
|--|--------------------|------------|----------|--------------------|---|
| 12.1.1.1 Research best practices in building employee morale | Mikey Houglan      |            | 5-1-2008 | 0 %                |  |

| Team Member Goals   | Person Responsible | Start Date | End Date   | % Complete/<br>YTD | Status/<br>Variance   |
|---|--------------------|------------|------------|--------------------|---|
| 12.1.2.1 Determine budget for party                       | Sue Smith          | 2-8-2008   | 12-15-2008 | 50 %               |    |
| 12.1.2.2 Solicit ideas for theme, entertainment, catering | Sue Smith          | 2-8-2008   | 2-22-2008  | 0 %                |  |

## ***Plan Implementation***

The following are actions we will take to implement the strategic plan on an ongoing basis:

- Appoint a strategic plan manager
- Hold people accountable
- Put in place an incentive compensation plan
- Coach for achievement
- Empower managers
- Hold effective strategy meetings - first Mondays
- Hold annual retreat - second week in December