



# Sierra Technology Solutions 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 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.**

<b>Corporate Goal:</b> 1.1 To generate sales of \$1 million by the end of the year. (12-31-2008) (Administration)	<b>Measure:</b> \$ in sales	<b>Target:</b> \$1,000,000.00	<b>% Complete/ YTD</b> \$465,000.00	<b>Status/ Variance:</b> \$- 535,000.00
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**Strategic Objective**

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

<b>Corporate Goal:</b> 2.1 To increase average billable hour factor. (11-1-2008) (Administration)	<b>Measure:</b> \$ per billable hour	<b>Target:</b> \$150.00	<b>% Complete/ YTD</b> \$84.17	<b>Status/ Variance:</b> \$-65.83
<b>Corporate Goal:</b> 2.2 To fund online product development with a stated percentage of monthly net profit (10-31-2008) (Administration)	<b>Measure:</b> % complete	<b>Target:</b> 100%	<b>% Complete/ YTD</b> 25 %	<b>Status/ Variance:</b> 

# Customer Strategic Objectives & Corporate Goals

## Customer Groups

## Needs and Characteristics

### Current Customers

Has an existing system in place. Needs minimal to maximum coaching through the package selection process and installation. Willing to hire someone. Willing to commit time, money and staff. Willing to be facilitated throughout the process.

### New Customers

Needs a quick solution to focus and guide their business. Needs a tool to get started. Want a self-support product. Desire to move their business to the next level. Ready to commit time and money to their information systems. Do it-yourselfers. Not necessarily sole-proprietors. Needs to be easy, practical and simple. Linear use. Do it and it is done. More than 5 employees. Established business.

Size of market: # of Small Businesses: 5.5 million # of Sole Proprietors: 17 million # of Women-Owned Business: 34% # of Businesses in our City: 7,000

### Referral

Need a quick solution.

## 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 %	

**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 %	
4.1.2 Explore methods to distribute access to new software	Web Specialists	8-1-2007	7-30-2008	90 %	



**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 %	
4.2.2 Web site – updated monthly, Google ad words - ongoing, direct mail based on in-house lists - 1 newsletter, 2 promo pieces	Web Specialists	8-1-2008	1-30-2009	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 %	
5.1.2 Develop 30 minute "Premium Package" presentation	Web Specialists	1-1-2008	4-30-2008	0 %	
5.1.3 Schedule Webinars on an ongoing basis.	Web Specialists	1-1-2008	6-30-2008	0 %	

**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:**5.3 Optimize websites by end of the year (12-31-2008) (Web Specialists)

**Measure:**# of websites optimized

**Target:**3

**% Complete/ YTD**  
0 %

**Status/ Variance:**

Department Goals	Person Responsible	Start Date	End Date	% Complete/ YTD	Status/ Variance
5.3.1 Hire outside vendor to assess system and provide recommendations	Web Specialists	1-1-2008	9-30-2008	0 %	
5.3.2 Optimize system in-house based upon recommendations of vendor.	Web Specialists	1-1-2008	11-30-2008	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 %	
5.4.2 Write and edit content for Software Intro	Web Specialists	1-1-2008	7-31-2008	0 %	
5.4.3 Have new software programmed	IT Group	1-1-2008	8-31-2008	0 %	

**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:**

Department Goals	Person Responsible	Start Date	End Date	% Complete/ YTD	Status/ Variance
6.1.1 Investigate international access requirements.	IT Group	1-1-2008	10-31-2008	0 %	
6.1.2 Purchase necessary software/hardware or make arrangements with an internet service provider for virtual access.	IT Group	1-1-2008	12-31-2008	0 %	

**Corporate Goal:**6.2 Define all procedures and process in writing in order to support projected growth. (12-31-2008) (Administration)

**Measure:**# of process in writing.

**Target:**100%

**% Complete/ YTD**  
50 %

**Status/ Variance:**

Department Goals	Person Responsible	Start Date	End Date	% Complete/ YTD	Status/ Variance
6.2.1 Write down steps for accounting and marketing system.	IT Group	1-1-2008	12-31-2008	0 %	

**Strategic Objective**

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

**Corporate Goal:**7.1 Develop version #2 of the web-based planning system. (11-30-2008) (IT Group)

**Measure:** Accomplishment

**Target:**100%

**% Complete/ YTD**  
0 %

**Status/ Variance:**  


Department Goals	Person Responsible	Start Date	End Date	% Complete/ YTD	Status/ Variance
7.1.1 Map out entire new version including all revision thoughts.	Web Specialists	1-1-2008	5-31-2008	0 %	
7.1.2 Hire a vendor to re-program system based upon at least 3 proposals.	IT Group	8-1-2008	8-31-2008	80 %	

**Strategic Objective**


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



**Corporate Goal:**8.1 Develop an effective scholarship program for socially/community focused entrepreneurs. (12-31-2008) (Administration)

**Measure:** Accomplishment

**Target:**100%

**% Complete/ YTD**  
15 %

**Status/ Variance:**  


Department Goals	Person Responsible	Start Date	End Date	% Complete/ YTD	Status/ Variance
8.1.1 Research existing scholarship programs from other companies.		1-1-2008	12-31-2008	25 %	
8.1.2 Synthesize best programs available into one that fits our parameters.	IT Group	1-1-2008	12-31-2008	0 %	

**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.**


**Corporate Goal:**10.1 Create strategic planning library and resource center (7-2-2008) (Web Specialists)

**Measure:**

**Target:**

**% Complete/  
YTD**  
0 %

**Status/  
Variance:**  


Department Goals	Person Responsible	Start Date	End Date	% Complete/ YTD	Status/ Variance
10.1.1 Research strategic planning recommended reading list, best practices	Administration		6-29-2008	75 %	



**Corporate Goal:**10.2 Attendance at best practice conference by management. (12-31-2008)

**Measure:** Actual attendance per year

**Target:**1

**% Complete/  
YTD**  
25 %

**Status/  
Variance:**  


Department Goals	Person Responsible	Start Date	End Date	% Complete/ YTD	Status/ Variance
10.2.1 Research information technology conferences and workshops available this year.	IT Group	1-1-2008	2-1-2008	100 %	
10.2.2 Circulate list of conferences and workshops and get commitment from all management personnel.	IT Group	2-1-2008	2-15-2008	0 %	

## Strategic Objective

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


**Corporate Goal:**11.1 Retain services of public relations firm to develop industry presence (7-31-2008) (Administration)

**Measure:**% completed

**Target:**100

**% Complete/  
YTD**  
50 %

**Status/  
Variance:**  


Department Goals	Person Responsible	Start Date	End Date	% Complete/ YTD	Status/ Variance
11.1.1 Create formal request for bids from local, state, regional public relations firms	Administration		6-8-2008	100 %	



**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 %	

**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/ YTD	Status/ 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 %	

## ***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