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ACME CORPORATION

STRATEGIC PLAN 2014-2016

*Full Strategic Plan w/Progress*

As of October 27, 2016 for FY16

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## MISSION STATEMENT

Our core purpose is to create technology solutions for forward-thinking organizations to empower their success and to magnify their impact.

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## VISION STATEMENT

We envision being THE technology experts and resource center for small and medium-sized organizations.

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## CORE VALUES

- Purpose & Growth - our foundation is built on our purpose and provides a place for our team's passion.
- Client Focus - a razor-sharp focus on our customer's growth is essential and the only way to succeed.
- Integrity - to have honesty and respect for all individuals.
- Leadership - to empower and inspire entrepreneurial leaders.
- Professionalism - to be professional in our actions to our clients, partners and each other.
- Excellence - to continually pursue knowledge and learn.
- Community Service - to effectively help organizations to make an impact
- Fun - to have enjoyment and fulfillment in our work.

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## COMPETITIVE ADVANTAGES

- Reoccurring revenue that is scalable
- Assets and software products in place outside our services
- Innovative in marrying business process with technology
- Business Network - domestic and international
- Patented Intellectual Property - interactive, integrated web-based

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## STRATEGIC ISSUES

- What is the best method to meld the different cultures and build a strong team to most effectively deliver on mission?
- How do we build and incorporate consistency in our growth strategies, standardized operating procedures and communications in light of frequent changes in leadership?
- How do we best meet the growth operations and service demands in light of consistent budget cuts?

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## ORGANIZATION-WIDE STRATEGIES

Organization-Wide Focus:

2013 - Lay the foundation for the organization.

2014 - Execute a market penetration strategy to increase top line.

2015 - Standardization of all processes.

2016 - Develop the infrastructure to prepare for high growth.

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# CUSTOMER SEGMENTS

## **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.










## **Program or Product**






Describe how program or product are service people.

## **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

# STRATEGIC PLAN 2014-2016 - PROGRESS AT-A-GLANCE

| STRATEGIC OBJECTIVES AND ORGANIZATION GOALS  | EOY TARGET, MEASURE                                  | ACTUAL      | STATUS   |
|--|--|-------------|--|
| <b>1 Financial Sustainability: Grow our business in a responsible and controlled way to increase revenue by 30% year-over-year for the next 3 years while maintaining a 20% net profit margin each year.</b> |  |             |  |
| 1.1 Generate sales of \$1.5 million by the end of the year.  | \$1,500,000<br>\$ in sales                           | \$1,520,000 | <br>\$20,000<br><small>As of 10/04/16</small> |
| 1.2 Maintain profitability with a budget allocation of 50% for business re-investment for product development.   | 50%<br>% of budget allocated for product development | 45%         | <br>-5%<br><small>As of 10/10/16</small>      |
| 1.3 Increase average billable hour factor.   | \$300<br>\$ per billable hour.                       | \$305.14    | <br>\$5.14<br><small>As of 10/24/16</small>   |
| <b>2 Professional Services: To be the professional partner of choice.</b>  |  |             |  |
| 2.1 Professional Service: Acquire 10 new consulting clients at \$10,000+ per month.  | 10<br># of new consulting clients                    | 33,014      | <br>33,004<br><small>As of 10/24/16</small>   |
| 2.2 Industry Expertise: Be rated among the Top 10 fastest growing tech companies in 2016.  | 10<br>Industry ranking                               | 7           | <br>3<br><small>As of 08/02/16</small>      |
| <b>3 Maintenance Contracts: To be viewed as the top technology resource in the western region.</b>   |  |             |  |
| 3.1 Maintain 85% of our current customers.   | 85%<br>% customer retention                          | 90%         | <br>5%<br><small>As of 09/13/16</small>     |
| 3.2 Achieve an average of a 9 point satisfaction score on exit surveys.  | 9<br>Customer satisfaction score                     | 7.67        | <br>-1.33<br><small>As of 03/09/16</small>  |
| 3.3 Licensing: Acquire 3,000 total licenses by the end of the year.  | 3,000<br># of new licenses                           | 1           | <br>-2,999<br><small>As of 04/21/16</small> |
| 3.4 Maintenance Contracts: Acquire an average of 7 new maintenance contracts per month   | 7<br>avg monthly # of new maintenance contracts      | 11.33       | <br>4.33<br><small>As of 04/25/16</small>   |
| <b>4 Innovation/Product Development: Continue to develop technology innovation.</b>  |  |             |  |

|  |   |      |  |
|--|---|------|--|
| 4.1 Launch integration with 4 other applications.  | 100%<br>Applications Integrated                     | 100% | <br>0%<br>As of 10/12/16    |
| <b>5 Overall Operations: Develop and maintain an infrastructure that allows for a virtual office and efficient overhead.</b>   |   |      |  |
| 5.3 Blogs & Newsletters: Consistently timely relevant thought leadership that is developed, published and preserved.   | 6<br># of pieces published weekly                   | 5.33 | <br>-0.67<br>As of 04/13/16 |
| 5.4 Police to prevent blocking box.  | 25<br># of accidents from "blocked boxes"           | 2    | <br>23<br>As of 10/24/16    |
| <b>6 Training: Actively help our team to develop and grow professional and personally by supporting a flexible work life, providing intellectually engaging work, and fair compensation.</b> |   |      |  |
| 6.1 Train sales people in best practices   | 14<br>actual attendance per year by all 12 managers | 11   | <br>-3<br>As of 04/12/16    |
| <b>7 Community Involvement: Develop and implement a corporate giving strategy that is in line with our competitive advantages.</b>   |   |      |  |
| 7.1 Manage the selection, contribution and customer communication of nonprofit donations. Target is 15% of revenue.  | 15%<br>% of license revenue                         | 2%   | <br>-13%<br>As of 04/12/16  |

# STRATEGIC PLAN 2014-2016 - PROGRESS DETAIL

## FINANCIAL STRATEGIC OBJECTIVES & ORGANIZATION GOALS

**1 Financial Sustainability: Grow our business in a responsible and controlled way to increase revenue by 30% year-over-year for the next 3 years while maintaining a 20% net profit margin each year.**

**1.1 Generate sales of \$1.5 million by the end of the year. (Administration) Measure: \$ in sales (12/31/25) Target: \$1,500,000**

*Comments on Status: 2/5/15- Missed sales target this month due in large part to being closed for weather*

| DEPARTMENT GOALS AND TEAM MEMBER GOALS   | START/END DATE     | TARGET, MEASURE  | ACTUAL    | STATUS                       |
|--|--------------------|--|-----------|------------------------------|
| 1.1.1 Develop our credit card program. (Administration)  | 06/01/16, 12/31/20 | \$50,000<br>Gross Revenue                              | \$75,500  | As of 10/04/16               |
| 1.1.1.1 Complete a park Master Plan (JoAnne Rogers)<br><i>Comments on Status: 10/3/16 - Plan being drafted.</i>  | 06/01/16, 12/31/20 | 100%<br>Total number of active cards.                  | 50%       | As of 10/04/16               |
| 1.1.2 Software Licenses: Generate \$300,000 from added software features by the end of each FY. (Administration)<br><i>Comments on Status: 6/16/14 - waiting on IT to fix server so we can run reports. 3/26/15-Wait for approval from Bob</i> | 01/01/14, 12/31/16 | \$300,000<br>\$ generated from added software features | \$605,250 | \$305,250<br>As of 10/05/16  |
| 1.1.2.1 Develop 8 software programs to monitor licenses. (Grant Howell)<br><i>Comments on Status: 6/14/14 - We are getting closer and closer. Starting the 3rd milestone. 3/17/15-Waiting on Bob</i>   | 01/01/14, 12/31/16 | 8<br># of software programs                            | 8         | 0<br>As of 09/01/16          |
| 1.1.2.2 Build marketing collateral (Sales Director)<br><i>Comments on Status: (CV) 2 of 6 pieces developed.</i>  | 01/01/14, 12/31/16 | 100%<br>% complete collateral                          | 100%      | As of 08/29/16               |
| 1.1.3 Maintenance Contracts: Generate \$500,000 in maintenance contracts. (Marketing)<br><i>Comments on Status: 1/14/14 (SF) Original target was \$500K, too aggressive, adjust to \$250K</i>  | 01/01/13, 12/31/16 | \$500,000<br>\$ generated from maintenance contracts   | \$130,000 | \$-370,000<br>As of 10/05/16 |
| 1.1.4 Professional Consulting: Generate \$700,000 in web design consulting. (Customer Service)   | 01/01/13, 12/31/16 | \$700,000<br>\$ generated from web design consulting   | \$307,000 | \$-393,000<br>As of 10/10/16 |

**1.2 Maintain profitability with a budget allocation of 50% for business re-investment for product development. (Administration) (12/31/16)**

*Comments on Status: 3/1/2015 staying strong. Heading in the right direction! 6/1/2015- We are on target! Great work!*

**Measure:** % of budget allocated for product development

**Target:** 50%

**1.3 Increase average billable hour factor. (Administration) (12/31/16)**

*Comments on Status: 6/30- We improved from last month but we're still behind where we would like to be.*

**Measure:** \$ per billable hour.





**Target:** \$300



**2 Professional Services: To be the professional partner of choice.**

**2.1 Professional Service: Acquire 10 new consulting clients at \$10,000+ per month. (Administration) (12/31/16)**

**Measure:** # of new consulting clients  
**Target:** 10

| DEPARTMENT GOALS AND TEAM MEMBER GOALS  | START/END DATE     | TARGET, MEASURE                          | ACTUAL | STATUS  |
|---|--------------------|--|--------|---|
| 2.1.1.1 Develop 2 new webinars a quarter to assist Sales Team. (Marketing)        | 01/01/15, 12/31/16 | 8<br># of new webinars                   | -8     | <br>As of 01/05/16 |
| 2.1.1.2 Review existing presentations format for consistency. (Crystal O'Langdon) | 01/12/13, 03/22/14 | % Complete                               |        | <br>As of 10/02/14 |
| 2.1.1.2.1 Develop campaign materials for 3 new markets. (Crystal O'Langdon)       | 07/01/16, 12/31/16 | 100%<br>% of campaign materials complete |        | <br>As of 08/24/16 |
| 2.1.3 Work on new program for.... (IT Group)                                      | 01/12/13, 12/31/16 | 50%                                      |        | <br>As of 12/23/15 |

**2.2 Industry Expertise: Be rated among the Top 10 fastest growing tech companies in 2016. (Marketing) (12/31/16)**





**Measure:** Industry ranking  
**Target:** 10

**3 Maintenance Contracts: To be viewed as the top technology resource in the western region.**

**3.1 Maintain 85% of our current customers. (Administration) (12/31/16)**

**Measure:** % customer retention  
**Target:** 85%

*Comments on Status: Quick comment... lost contract...*

| DEPARTMENT GOALS AND TEAM MEMBER GOALS   | START/END DATE     | TARGET, MEASURE   | ACTUAL | STATUS  |
|--|--------------------|-------------------|--------|---|
| 3.1.1 Implement marketing campaign to draw in new markets. #studentlearning (Marketing)<br><i>Comments on Status: 10/1/13 Comment</i>  | 01/01/13, 12/31/13 | % completed       |        | <br>As of 02/29/16 |
| 3.1.1.1 Research and identify 6 opportunities in new markets that company could expand into. (JoAnne Rogers)   | 01/20/13, 06/30/16 | 6<br>% complete   | 5      | <br>As of 06/16/16 |
| 3.1.2 Develop a competitive analysis survey for our market. (Administration)<br><i>Comments on Status: 6/16/14 - goal was set up as a KPI, but that was wrong. I updated that and this goal is complete!</i> | 01/01/16, 12/31/16 | % Complete        |        | <br>As of 12/23/15 |
| 3.1.3 Increase sales close rate by 25% to achieve a 43% close rate by EOY. (Marketing)<br><i>Comments on Status: 1/15/14 Goal achieved</i>   | 01/01/13, 12/31/16 | 43%<br>Close rate | 32%    | <br>As of 01/05/16 |



**3.2 Achieve an average of a 9 point satisfaction score on exit surveys. (Customer Service) (12/31/16)**






**Measure:** Customer satisfaction score

**Target:** 9

**3.3 Licensing: Acquire 3,000 total licenses by the end of the year. (12/31/16)**

**Measure:** # of new licenses


**Target:** 3,000

| DEPARTMENT GOALS AND TEAM MEMBER GOALS  | START/END DATE        | TARGET, MEASURE         | ACTUAL | STATUS  |
|---|-----------------------|-------------------------|--------|---|
| 3.3.1 Grow average monthly licenses by 40% to 840 (IT Group)<br><i>Comments on Status: 1/7/14 Tim is still working on....</i> | 01/01/13,<br>12/31/16 | 840<br># Licenses       | 600    | <br>-240<br>As of 01/05/16   |
| 3.3.2 Grow new customer conversions by 100% to an average of 78/month. (IT Group)   | 01/01/13,<br>12/31/16 | 78<br># of new licenses | 78     | <br>As of 08/10/16           |
| 3.3.3 Grow new customer trials by 25% to mark of 88 New Trials per month. (IT Group)  | 01/01/13,<br>12/31/16 | 88<br># of New Trials   |        | <br>-88<br>As of 12/23/15    |
| 3.3.4 Maintain or decrease the Churn Rate of Licenses which is currently at 7.99%. (Customer Service)                         | 01/01/13,<br>12/31/16 | 7.99%<br>% Churn        | 8.01%  | <br>-0.02%<br>As of 01/05/16 |
| 3.3.4.1 Secure coaching on Customer Success Manager for team. (Crystal O'Langdon)   | 01/01/16,<br>12/09/16 | % Complete              |        | <br>As of 02/03/16         |

**3.4 Maintenance Contracts: Acquire an average of 7 new maintenance contracts per month (12/31/16)**

**Measure:** avg monthly # of new maintenance contracts

**Target:** 7

| DEPARTMENT GOALS AND TEAM MEMBER GOALS  | START/END DATE        | TARGET, MEASURE             | ACTUAL | STATUS  |
|---|-----------------------|-----------------------------|--------|---|
| 3.4.1 Identify and maintain list of 65 target customers that could benefit from a maintenance contract. (Marketing) | 01/01/13,<br>12/31/16 | 65<br># of target customers |        | <br>As of 12/23/15 |

**4 Innovation/Product Development: Continue to develop technology innovation.**

**4.1 Launch integration with 4 other applications. (IT Group) (08/30/16)**

*Comments on Status: 3/9/16 We are held up on contracts.*

**Measure:** Applications Integrated

**Target:** 100%

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

**5.3 Blogs & Newsletters: Consistently timely relevant thought leadership that is developed, published and preserved. (Marketing) (12/31/16)**



**Measure:** # of pieces published weekly

**Target:** 6

**5.4 Police to prevent blocking box. (09/30/18)**

**Measure:** # of accidents from "blocked boxes"

**Target:** 25

| DEPARTMENT GOALS AND TEAM MEMBER GOALS   | START/END DATE     | TARGET, MEASURE                   | ACTUAL | STATUS  |
|--|--------------------|-----------------------------------|--------|---|
| 5.4.1 Hire two new traffic officers.   | 10/01/16, 09/30/18 | 2<br># of new officers hired      |        | <br>As of 10/24/16   |
| 5.4.1.1 Host new position on website for traffic officer positions. (Sales Director) | 10/01/16, 09/30/18 | 100%<br>% of ad hosted on website |        | <br>As of 10/24/16 |

**6 Training: Actively help our team to develop and grow professional and personally by supporting a flexible work life, providing intellectually engaging work, and fair compensation.**

**6.1 Train sales people in best practices (Marketing) (11/30/16)**

**Measure:** actual attendance per year by all 12 managers


**Target:** 14


**7 Community Involvement: Develop and implement a corporate giving strategy that is in line with our competitive advantages.**


**7.1 Manage the selection, contribution and customer communication of nonprofit donations. Target is 15% of revenue. (Administration) (12/31/16)**


**Measure:** % of license revenue


**Target:** 15%

 Not Started


 Deferred

 On Target

 Off Target

 Waiting on Someone

 Critical

 Achieved

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## PLAN IMPLEMENTATION

Appoint a strategic plan manager

Hold people accountable (now that they are able)

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