



ACME CORPORATION

STRATEGIC PLAN 2014-2016

One-Click

As of October 27, 2016

MISSION STATEMENT

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

VISION STATEMENT

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

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.

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

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?

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.

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 — AT-A-GLANCE

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.

1.2 Maintain profitability with a budget allocation of 50% for business re-investment for product development.

1.3 Increase average billable hour factor.

CUSTOMER STRATEGIC OBJECTIVES & ORGANIZATION GOALS

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

2.1 Professional Service: Acquire 10 new consulting clients at \$10,000+ per month.

2.2 Industry Expertise: Be rated among the Top 10 fastest growing tech companies in 2016.

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

3.1 Maintain 85% of our current customers.

3.2 Achieve an average of a 9 point satisfaction score on exit surveys.

3.3 Licensing: Acquire 3,000 total licenses by the end of the year.

3.4 Maintenance Contracts: Acquire an average of 7 new maintenance contracts per month

INTERNAL/OPERATIONAL STRATEGIC OBJECTIVES & ORGANIZATION GOALS

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

4.1 Launch integration with 4 other applications.

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

5.1 Set up computers to be accessed from any destination.

5.2 Define all procedures and process in writing in order to support projected growth.

5.3 Blogs & Newsletters: Consistently timely relevant thought leadership that is developed, published and preserved.

5.4 Police to prevent blocking box.

PEOPLE/LEARNING STRATEGIC OBJECTIVES & ORGANIZATION GOALS

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

6.2 Develop better communication and presentation skills to increase ability to work with and assist clients.

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.

STRATEGIC PLAN 2014-2016 - 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) (12/31/25)

**Measure: \$ in sales
Target:**

DEPARTMENT GOALS AND TEAM MEMBER GOALS	MEASURE	TARGET	START DATE, END DATE
1.1.1 Develop our credit card program. (Administration)	Gross Revenue	\$50,000	06/01/16, 12/31/20
1.1.1.1 Complete a park Master Plan (JoAnne Rogers)	Total number of active cards.	12,000%	06/01/16, 12/31/20
1.1.2 Software Licenses: Generate \$300,000 from added software features by the end of each FY. (Administration)	\$ generated from added software features	\$300,000	01/01/14, 12/31/16
1.1.2.1 Develop 8 software programs to monitor licenses. (Grant Howell)	# of software programs	8	01/01/14, 12/31/16
1.1.2.2 Build marketing collateral (Sales Director)	% complete collateral	100%	01/01/14, 12/31/16
1.1.3 Maintenance Contracts: Generate \$500,000 in maintenance contracts. (Marketing)	\$ generated from maintenance contracts	\$500,000	01/01/13, 12/31/16
1.1.4 Professional Consulting: Generate \$700,000 in web design consulting. (Customer Service)	\$ generated from web design consulting	\$700,000	01/01/13, 12/31/16

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

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

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

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

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:

DEPARTMENT GOALS AND TEAM MEMBER GOALS	MEASURE	TARGET	START DATE, END DATE
2.1.1 Develop 2 new webinars a quarter to assist Sales Team. (Marketing)	# of new webinars	8	01/01/15, 12/31/16
2.1.1.1 Develop 15 minute "Basic Package" presentation. (Crystal O'Langdon)	% Complete	100%	01/12/14, 12/31/15
2.1.1.2 Review existing presentations format for consistency. (Crystal O'Langdon)	% Complete	100%	01/12/13, 03/22/14
2.1.1.2.1 Develop campaign materials for 3 new markets. (Crystal O'Langdon)	% of campaign materials complete	100%	07/01/16, 12/31/16
2.1.1.3 Create a consistent slide template for Webinars. (Thomas Wright)	% Complete of standard templates	100%	01/13/15, 12/31/15
2.1.2 Develop a new software program to track clients (IT Group)	% of program completed	100%	06/19/15, 12/31/15
2.1.3 Work on new program for.... (IT Group)		50%	01/12/13, 12/31/16

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

Measure: Industry ranking

Target:

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:

DEPARTMENT GOALS AND TEAM MEMBER GOALS	MEASURE	TARGET	START DATE, END DATE
3.1.1 Implement marketing campaign to draw in new markets. #studentlearning (Marketing)	% completed	100%	01/01/13, 12/31/13
3.1.1.1 Research and identify 6 opportunities in new markets that company could expand into. (JoAnne Rogers)	% complete	6	01/20/13, 06/30/16
3.1.1.1.1 Complete a competitive analysis study of our current and prospective markets. (Tom Jones)	% complete	100%	01/01/11, 04/30/12
3.1.1.2 Develop campaign material for new markets. (Sales Director)	% complete	100%	03/01/12, 12/31/13

3.1.1.3 Create new web pages (rough draft) for the campaign promotion. (Randall Scion)	% Complete	100%	06/01/12, 05/31/13
3.1.2 Develop a competitive analysis survey for our market. (Administration)	% Complete	100%	01/01/16, 12/31/16
3.1.3 Increase sales close rate by 25% to achieve a 43% close rate by EOY. (Marketing)	Close rate	43%	01/01/13, 12/31/16

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

Measure: Customer satisfaction score

Target:

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

Measure: # of new licenses

Target:

DEPARTMENT GOALS AND TEAM MEMBER GOALS	MEASURE	TARGET	START DATE, END DATE
3.3.1 Grow average monthly licenses by 40% to 840 (IT Group)	# Licenses	840	01/01/13, 12/31/16
3.3.2 Grow new customer conversions by 100% to an average of 78/month. (IT Group)	# of new licenses	78	01/01/13, 12/31/16
3.3.3 Grow new customer trials by 25% to mark of 88 New Trials per month. (IT Group)	# of New Trials	88	01/01/13, 12/31/16
3.3.4 Maintain or decrease the Churn Rate of Licenses which is currently at 7.99%. (Customer Service)	% Churn	7.99%	01/01/13, 12/31/16
3.3.4.1 Secure coaching on Customer Success Manager for team. (Crystal O'Langdon)	% Complete	100%	01/01/16, 12/09/16

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:

DEPARTMENT GOALS AND TEAM MEMBER GOALS	MEASURE	TARGET	START DATE, END DATE
3.4.1 Identify and maintain list of 65 target customers that could benefit from a maintenance contract. (Marketing)	# of target customers	65	01/01/13, 12/31/16

4 Innovation/Product Development: Continue to develop technology innovation.**4.1 Launch integration with 4 other applications. (IT Group) (08/30/16)****Measure:** Applications Integrated**Target:**

DEPARTMENT GOALS AND TEAM MEMBER GOALS	MEASURE	TARGET	START DATE, END DATE
4.1.1 Map out entire integration process (Web Specialists)	% of Map completed	100%	01/01/14, 06/30/15

5 Overall Operations: Develop and maintain an infrastructure that allows for a virtual office and efficient overhead.**5.1 Set up computers to be accessed from any destination. (Administration) (12/31/15)****Measure:** % complete of computer accessible from any destination**Target:**

DEPARTMENT GOALS AND TEAM MEMBER GOALS	MEASURE	TARGET	START DATE, END DATE
5.1.1 Purchase necessary software/hardware or make arrangements with an internet service provider for virtual access. (IT Group)	% complete	100%	01/01/15

5.2 Define all procedures and process in writing in order to support projected growth. (12/31/15)**Measure:** % of process in writing.**Target:****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:**

DEPARTMENT GOALS AND TEAM MEMBER GOALS	MEASURE	TARGET	START DATE, END DATE
5.3.1 Write 1 blog post per week (Web Specialists)	# of blog posts	52	01/01/13, 12/31/13
5.3.2 Write 2 newsletters per month. (Administration)	# of newsletters	2	01/01/13, 12/31/13

5.4 Police to prevent blocking box. (09/30/18)**Measure:** # of accidents from "blocked boxes"

Target:

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

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:

6.2 Develop better communication and presentation skills to increase ability to work with and assist clients. (Customer Service) (12/31/13)

Measure: % complete in communication/presentation skills
Target:

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:

DEPARTMENT GOALS AND TEAM MEMBER GOALS	MEASURE	TARGET	START DATE, END DATE
7.1.1 Determine budget for Community Involvement party. (Customer Service)	% Complete	100%	01/01/13, 05/31/15
7.1.1.1 Solicit ideas for theme, entertainment, catering for Community Involvement party. (Thomas Wright)	% Complete	100%	01/01/15, 07/31/15

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

APPENDIX A: INTERNAL AND EXTERNAL ASSESSMENT

Internal

Strengths

- Dedicated and experienced employees.
- Good leadership
- Extensive product knowledge and expertise.
- Long-time community presence.
- Good communication skills.
- Networking and relationships in community.
- Knowledgeable of technology.
- Good ability to adapt to unique situations.
- Employee bench strength

External

Opportunities

- Skilled, well-educated workforce with high local unemployment.
- Limited competition currently.
- Growth of the community.
- Commercial office space available at historic low \$\$.
- Increase demand for networking of computers.
- Increasing need for knowledgeable technology people.

Weaknesses

- Lack of a consistent pricing strategy.
- Consistent branding/marketing messages.
- Limited physical workspace/overcrowded.
- Lack of sufficient office space.
- Inconsistent communication with potential constituents.
- Administration processes need to be written.
- Lack of organizational chart.

Threats

- Increased local competition and expansion into market by national firms.
- Margin erosion by low cost competitors.
- High unemployment rates on decline; pool of qualified potential new hires shrinking.

APPENDIX B: FY16 - FY20 ROADMAP

STRATEGIC OBJECTIVES & ORGANIZATION GOALS	SHORT TERM ITEMS (FY16)	MID TERM ITEMS (FY17-FY18)	LONG TERM ITEMS (FY19-FY20)
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.	✓	✓	✓
1.2 Maintain profitability with a budget allocation of 50% for business re-investment for product development.	✓		
1.3 Increase average billable hour factor.	✓		
2 Professional Services: To be the professional partner of choice.			
2.1 Professional Service: Acquire 10 new consulting clients at \$10,000+ per month.	✓		
2.2 Industry Expertise: Be rated among the Top 10 fastest growing tech companies in 2016.	✓		
3 Maintenance Contracts: To be viewed as the top technology resource in the western region.			
3.1 Maintain 85% of our current customers.	✓		
3.2 Achieve an average of a 9 point satisfaction score on exit surveys.	✓		
3.3 Licensing: Acquire 3,000 total licenses by the end of the year.	✓		
3.4 Maintenance Contracts: Acquire an average of 7 new maintenance contracts per month	✓		
4 Innovation/Product Development: Continue to develop technology innovation.			
4.1 Launch integration with 4 other applications.	✓		
5 Overall Operations: Develop and maintain an infrastructure that allows for a virtual office and efficient overhead.			
5.1 Set up computers to be accessed from any destination.			
5.2 Define all procedures and process in writing in order to support projected growth.			
5.3 Blogs & Newsletters: Consistently timely relevant thought leadership that is developed, published and preserved.	✓		
5.4 Police to prevent blocking box.	✓	✓	
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	✓		
6.2 Develop better communication and presentation skills to increase ability to work with and assist clients.			

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.



APPENDIX C: FY16 - FY19 BUDGET

ITEMS	FY16	FY17	FY18	FY19
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.	\$150	\$200		
1.1.1 Develop our credit card program.				
1.1.1.1 Complete a park Master Plan				
1.1.2 Software Licenses: Generate \$300,000 from added software features by the end of each FY.	\$200			
1.1.2.1 Develop 8 software programs to monitor licenses.	\$30			
1.1.2.2 Build marketing collateral	\$30			
1.1.3 Maintenance Contracts: Generate \$500,000 in maintenance contracts.	\$2,500			
1.1.4 Professional Consulting: Generate \$700,000 in web design consulting.	\$50			
1.2 Maintain profitability with a budget allocation of 50% for business re-investment for product development.	\$0			
1.3 Increase average billable hour factor.	\$0			
2 Professional Services: To be the professional partner of choice.				
2.1 Professional Service: Acquire 10 new consulting clients at \$10,000+ per month.	\$0			
2.1.1 Develop 2 new webinars a quarter to assist Sales Team.	\$2,000			
2.1.1.1 Develop 15 minute "Basic Package" presentation.				
2.1.1.2 Review existing presentations format for consistency.				
2.1.1.3 Create a consistent slide template for Webinars.				
2.1.2 Develop a new software program to track clients				
2.1.3 Work on new program for....	\$200			
2.2 Industry Expertise: Be rated among the Top 10 fastest growing tech companies in 2016.	\$0			
3 Maintenance Contracts: To be viewed as the top technology resource in the western region.				
3.1 Maintain 85% of our current customers.	\$0			
3.1.1 Implement marketing campaign to draw in new markets. #studentlearning				
3.1.1.1 Research and identify 6 opportunities in new markets that company could expand into.				
3.1.1.2 Develop campaign material for new markets.				
3.1.1.3 Create new web pages (rough draft) for the campaign promotion.				

3.1.2 Develop a competitive analysis survey for our market.	\$700
3.1.3 Increase sales close rate by 25% to achieve a 43% close rate by EOY.	\$200
3.2 Achieve an average of a 9 point satisfaction score on exit surveys.	
3.3 Licensing: Acquire 3,000 total licenses by the end of the year.	
3.3.1 Grow average monthly licenses by 40% to 840	\$1,000
3.3.2 Grow new customer conversions by 100% to an average of 78/month.	\$250
3.3.3 Grow new customer trials by 25% to mark of 88 New Trials per month.	\$100
3.3.4 Maintain or decrease the Churn Rate of Licenses which is currently at 7.99%.	\$200
3.3.4.1 Secure coaching on Customer Success Manager for team.	\$400
3.4 Maintenance Contracts: Acquire an average of 7 new maintenance contracts per month	
3.4.1 Identify and maintain list of 65 target customers that could benefit from a maintenance contract.	\$300
4 Innovation/Product Development: Continue to develop technology innovation.	
4.1 Launch integration with 4 other applications.	\$7,000
4.1.1 Map out entire integration process	
5 Overall Operations: Develop and maintain an infrastructure that allows for a virtual office and efficient overhead.	
5.1 Set up computers to be accessed from any destination.	
5.1.1 Purchase necessary software/hardware or make arrangements with an internet service provider for virtual access.	
5.2 Define all procedures and process in writing in order to support projected growth.	
5.3 Blogs & Newsletters: Consistently timely relevant thought leadership that is developed, published and preserved.	
5.3.1 Write 1 blog post per week	
5.3.2 Write 2 newsletters per month.	
5.4 Police to prevent blocking box.	
5.4.1 Hire two new traffic officers.	
5.4.1.1 Host new position on website for traffic officer positions.	
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	

6.2 Develop better communication and presentation skills to increase ability to work with and assist clients.

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.




7.1.1 Determine budget for Community Involvement party.

7.1.1.1 Solicit ideas for theme, entertainment, catering for Community Involvement party.

Totals	\$15,310	\$200
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APPENDIX D: SCORECARD AND EVALUATION PLAN

KPIS (MEASURE)	EOY TARGET	EOY VARIANCE	YTD TARGET	YTD VARIANCE	YTD ACTUAL	STATUS
1.1 Generate sales of \$1.5 million by the end of the year. (\$ in sales)	\$1,500,000	\$20,000	\$1,035,000	\$485,000	\$1,520,000	 As of 10/04/16
1.3 Increase average billable hour factor. (\$ per billable hour.)	\$300	\$5.14	\$260	\$45.14	\$305.14	 As of 10/24/16
2.1 Professional Service: Acquire 10 new consulting clients at \$10,000+ per month. (# of new consulting clients)	10	33,004	90	32,924	33,014	 As of 10/24/16
3.1 Maintain 85% of our current customers. (% customer retention)	85%	5%	84%	6%	90%	 As of 09/13/16
3.4 Maintenance Contracts: Acquire an average of 7 new maintenance contracts per month (avg monthly # of new maintenance contracts)	7	4.33	7	4.33	11.33	 As of 04/25/16

 Not Started
  Deferred
  On Target
  Off Target
  Waiting on Someone
  Critical
  Achieved

APPENDIX E: STRATEGIC PLANNING TERMS

STRATEGIC PLANNING TERM	DEFINITION
Core Values/Guiding Principles	How people want to behave with each other in the organization. Value statements describe actions that are the living enactment of the fundamental values held by most individuals within the organization. What are our guiding principles, as a group, to adhere to no matter what?
Core Purpose/Mission Statement	The organization's core purpose. Why do we exist?
Vision Statement (5+ years)	Where you are headed – your future state – your Big, Hairy, Audacious Goal. Where are we going?
Competitive Advantages	A characteristic(s) of an organization that allows it to meet their customer's need(s) better than their competition can. What are we best at in our market?
Organization-Wide Strategies	Your strategies are the general methods you intend to use to reach your vision. A strategy is like an umbrella. It is a general statement(s) that guides and covers a set of activities. You can develop strategies for your whole organization, a department, a specific set of activities, or a guiding statement for a year. No matter what the level, a strategy answers the question "how."
Long-Term Strategic Objectives (3+ years)	Long-term, broad, continuous statements that address all areas of your organization. If you have a five-year vision, these would be three- to four-year intermediate guideposts on the way there. What must we focus on to achieve our vision?
Short-Term Items (1 year)	Short-term items that convert the Strategic Objectives into specific performance targets. Effective goals clearly state what, when, who and are specifically measurable – they are Specific, Measurable, Attainable, Responsible person, time bound (SMART). What must we do to achieve our long-term Strategic Objectives?
Key Performance Indicators (KPIs)	Metric and non-metric measurements essential to the completion of an organization's goals. Each organization narrows the possible list down to a manageable group of KPIs that make the most difference to performance. KPIs are linked to goals. How will we know we have achieved our goals?