



ACME CORPORATION

STRATEGIC PLAN 2014-2016

For FY16

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 products 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

ORGANIZATION GOALS	MEASURE	TARGET	ACTUAL	STATUS	
1.1 Generate sales of \$1.5 million by the end of the year.	\$ in sales	\$1,500,000	\$1,520,000	\$20,000 As of 10/04/16	←
1.2 Maintain profitability with a budget allocation of 50% for business re-investment for product development.	% of budget allocated for product development	50%	45%	-5% As of 10/10/16	→
1.3 Increase average billable hour factor.	\$ per billable hour.	\$300	\$266	-\$34 As of 09/01/16	→
2.1 Professional Service: Acquire 10 new consulting clients at \$10,000+ per month.	# of new consulting clients	10	21,014	21,004 As of 09/20/16	→
2.2 Industry Expertise: Be rated among the Top 10 fastest growing tech companies in 2016.	Industry ranking	10	7	3 As of 08/02/16	←
3.1 Maintain 85% of our current customers.	% customer retention	85%	90%	5% As of 09/13/16	→
3.2 Achieve an average of a 9 point satisfaction score on exit surveys.	Customer satisfaction score	9	7.67	-1.33 As of 03/09/16	←
3.3 Licensing: Acquire 3,000 total licenses by the end of the year.	# of new licenses	3,000	1	-2,999 As of 04/21/16	→
3.4 Maintenance Contracts: Acquire an average of 7 new maintenance contracts per month	avg monthly # of new maintenance contracts	7	11.33	4.33 As of 04/25/16	↓
4.1 Launch integration with 4 other applications.	Applications Integrated	100%	100%	0% As of 10/12/16	✓
5.3 Blogs & Newsletters: Consistently timely relevant thought leadership that is developed published and preserved.	# of pieces published weekly	6	5.33	-0.67 As of 04/13/16	⋮
6.1 Train sales people in best practices	actual attendance per year by all 12 managers	14	11	-3 As of 04/12/16	←
7.1 Manage the selection, contribution and customer communication of nonprofit donations. Target is 15% of revenue.	% of license revenue	15%	2%	-13% 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) (12/31/25)

Measure: \$ in sales
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 Gross Revenue	\$75,500	 As of 10/04/16
1.1.1.1 Complete a park Master Plan (JoAnne Rogers) <i>Comments on Status: 10/3/16 - Plan being drafted.</i>	06/01/16, 12/31/20	100% 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) <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 \$ generated from added software features	\$605,250	 \$305,250 As of 10/05/16
1.1.2.1 Develop 8 software programs to monitor licenses. (Grant Howell) <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 # of software programs	8	 0 As of 09/01/16
1.1.2.2 Build marketing collateral (Sales Director) <i>Comments on Status: (CV) 2 of 6 pieces developed.</i>	01/01/14, 12/31/16	100% % complete collateral	100%	 As of 08/29/16
1.1.3 Maintenance Contracts: Generate \$500,000 in maintenance contracts. (Marketing) <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 \$ generated from maintenance contracts	\$130,000	 \$-370,000 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 \$ generated from web design consulting	\$307,000	 \$-393,000 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)

Measure: % of budget allocated for product development





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

Target: 50%

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 Develop 2 new webinars a quarter to assist Sales Team. (Marketing)	01/01/15, 12/31/16	8 # of new webinars		 -8 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		 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% % of campaign materials complete		 As of 08/24/16
2.1.3 Work on new program for.... (IT Group)	01/12/13, 12/31/16	50%		 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) <i>Comments on Status: 10/1/13 Comment</i>	01/01/13, 12/31/13	% completed		 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 % complete	5	 As of 06/16/16
3.1.2 Develop a competitive analysis survey for our market. (Administration) <i>Comments on Status: 6/16/14 - goal was set up as a KPI, but that was wrong.</i>	01/01/16, 12/31/16	% Complete		 As of 12/23/15

3.1.3 Increase sales close rate by 25% to achieve a 43% close rate by EOY. (Marketing)

01/01/13,
12/31/16

43%
Close rate

32%

 As of 01/05/16

Comments on Status: 1/15/14 Goal achieved

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) <i>Comments on Status: 1/7/14 Tim is still working on....</i>	01/01/13, 12/31/16	840 # Licenses	600	 -240 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, 12/31/16	78 # of new licenses	78	 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, 12/31/16	88 # of New Trials		 -88 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, 12/31/16	7.99% % Churn	8.01%	 -0.02% As of 01/05/16
3.3.4.1 Secure coaching on Customer Success Manager for team. (Crystal O'Langdon)	01/01/16, 12/09/16	% Complete		 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, 12/31/16	65 # of target customers		 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) Measure: Applications Integrated

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

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

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

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