

# STRATEGIC PLAN 2014-2016: FY16












## ADMINISTRATION: ACTION PLAN - SUMMARY

Date Revised: October 18, 2016

PRIORITY	ITEMS	WHO	START DATE/ END DATE	EOY TARGET, MEASURE	% COMPLETE/ ACTUAL	STATUS	
<b>ORGANIZATION GOALS I LEAD</b>							
High	1.1 Generate sales of \$1.5 million by the end of the year.  <i>Comments on Status: 2/5/15- Missed sales target this month due in large part to being closed for weather</i>	Administration	01/01/14 12/31/25	\$1,500,000 \$ in sales	\$1,520,000	\$20,000  As of 10/04/16	←
Normal	1.2 Maintain profitability with a budget allocation of 50% for business re-investment for product development.  <i>Comments on Status: 3/1/2015 staying strong. Heading in the right direction! 6/1/2015- We are on target! Great work!</i>	Administration	01/01/13 12/31/16	50% % of budget allocated for product development	45%	As of 10/10/16	→
Normal	1.3 Increase average billable hour factor.  <i>Comments on Status: 6/30- We improved from last month but we're still behind where we would like to be.</i>	Administration	01/01/14 12/31/16	\$300 \$ per billable hour.	\$266	-\$34  As of 09/01/16	→
Normal	2.1 Professional Service: Acquire 10 new consulting clients at \$10,000+ per month.	Administration	01/12/13 12/31/16	10 # of new consulting clients	21,014	21,004  As of 09/20/16	→
High	3.1 Maintain 85% of our current customers.  <i>Comments on Status: Quick comment... lost contract...</i>	Administration	01/01/13 12/31/16	85% % customer retention	90%	5%  As of 09/13/16	→
Normal	7.1 Manage the selection, contribution and customer communication of nonprofit donations. Target is 15% of revenue.	Administration	01/01/13 12/31/16	15% % of license revenue	2%	As of 04/12/16	→
<b>MY ITEMS</b>							
	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  <i>Comments on Status: 10/3/16 - Plan being drafted.</i>	JoAnne Rogers	06/01/16, 12/31/20	100%, Total number of active cards.	50%	As of 10/04/16	→
Normal	1.1.2 Software Licenses: Generate \$300,000 from added software features by the end of each FY.  <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>	Administration	01/01/14, 12/31/16	\$300,000, \$ generated from added software features	\$605,250	\$305,250  As of 10/05/16	←
Normal	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	!

## ADMINISTRATION: ACTION PLAN - DETAIL

PRIORITY	ITEMS	WHO	START DATE/ END DATE	EOY TARGET, MEASURE	% COMPLETE/ ACTUAL	STATUS	
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.							
High	1.1 Generate sales of \$1.5 million by the end of the year.  <i>Comments on Status: 2/5/15- Missed sales target this month due in large part to being closed for weather</i>	Administration	01/01/14, 12/31/25	\$1,500,000, \$ in sales	\$1,520,000	\$20,000  As of 10/04/16	←
	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  <i>Comments on Status: 10/3/16 - Plan being drafted.</i>	JoAnne Rogers	06/01/16, 12/31/20	100%, Total number of active cards.	50%	As of 10/04/16	→
Normal	1.1.2 Software Licenses: Generate \$300,000 from added software features by the end of each FY.  <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>	Administration	01/01/14, 12/31/16	\$300,000, \$ generated from added software features	\$605,250	\$305,250  As of 10/05/16	←
High	1.1.2.1 Develop 8 software programs to monitor licenses.  <i>Comments on Status: 6/14/14 - We are getting closer and closer. Starting the 3rd milestone. 3/17/15-Waiting on Bob</i>	Grant Howell	01/01/14, 12/31/16	8, # of software programs	8	0  As of 09/01/16	✓
	1.1.2.2 Build marketing collateral  <i>Comments on Status: (CV) 2 of 6 pieces developed.</i>	Sales Director	01/01/14, 12/31/16	100%, % complete collateral	100%	As of 08/29/16	→
Normal	1.1.3 Maintenance Contracts: Generate \$500,000 in maintenance contracts.  <i>Comments on Status: 1/14/14 (SF) Original target was \$500K, too aggressive, adjust to \$250K</i>	Marketing	01/01/13, 12/31/16	\$500,000, \$ generated from maintenance contracts	\$130,000	\$-370,000  As of 10/05/16	→
Normal	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	→
Normal	1.2 Maintain profitability with a budget allocation of 50% for business re-investment for product development.  <i>Comments on Status: 3/1/2015 staying strong. Heading in the right direction! 6/1/2015- We are on target! Great work!</i>	Administration	01/01/13, 12/31/16	50%, % of budget allocated for product	45%	As of 10/10/16	→

				development			
Normal	1.3 Increase average billable hour factor.  <i>Comments on Status: 6/30- We improved from last month but we're still behind where we would like to be.</i>	Administration	01/01/14, 12/31/16	\$300, \$ per billable hour.	\$266	\$-34	As of 09/01/16 
<b>2 Professional Services: To be the professional partner of choice.</b>							
Normal	2.1 Professional Service: Acquire 10 new consulting clients at \$10,000+ per month.	Administration	01/12/13, 12/31/16	10, # of new consulting clients	21,014	21,004	As of 09/20/16 
	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 
<b>3 Maintenance Contracts: To be viewed as the top technology resource in the western region.</b>							
High	3.1 Maintain 85% of our current customers.  <i>Comments on Status: Quick comment... lost contract...</i>	Administration	01/01/13, 12/31/16	85%, % customer retention	90%	5%	As of 09/13/16 
Normal	3.1.1 Implement marketing campaign to draw in new markets. #studentlearning  <i>Comments on Status: 10/1/13 Comment</i>	Marketing	01/01/13, 12/31/13	% completed			As of 02/29/16 
Normal	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 
Normal	3.1.2 Develop a competitive analysis survey for our market.  <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>	Administration	01/01/16, 12/31/16	% Complete			As of 12/23/15 
Normal	3.1.3 Increase sales close rate by 25% to achieve a 43% close rate by EOY.  <i>Comments on Status: 1/15/14 Goal achieved</i>	Marketing	01/01/13, 12/31/16	43%, Close rate	32%		As of 01/05/16 

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