Acme Corporation

**Strategy Review Meeting
For FY16**

ACME Corp

OnStrategy

AGENDA

ACME Corp

I. **Acme Corporation Overview /
    Performance**
II. **Focus Area/Dept Review
    - Focus Area/Dept Performance /
Scorecard**
III. **Strategic Topics / Deep Dive**
IV. **Wrap-Up and Next Steps**

○ Not Started ⊙ Deferred ⊖ On Target ⊙ Off Target ① Waiting ① Critical ⊘ Achieved

OnStrategy

1

AGENDA - ORDER OF PRESENTATION

ACME Corp

Deb Smith

Administration: JoAnne Rogers

Customer Service: Mikey Hougland

IT Group: Nate Platt

Marketing: Sales / Marketing VP

OnStrategy

2

OVERALL - PERFORMANCE TO DATE

ACME Corp

ORGANIZATION GOALS

1.1 Generate sales of $1.5 million by the end of the year. (Administration)

Measure: $ in sales
Target: $1,500,000

Jan 2016
$100,000 / $80,000
Feb 2016
$100,000 / $45,000
Mar 2016
$150,000 / $50,000

$175,000

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

Measure: % of budget allocated for product development
Target: 50%

Jan 2016
50% / 35%
Feb 2016
50% / 40%
Mar 2016
50% /

37.50%

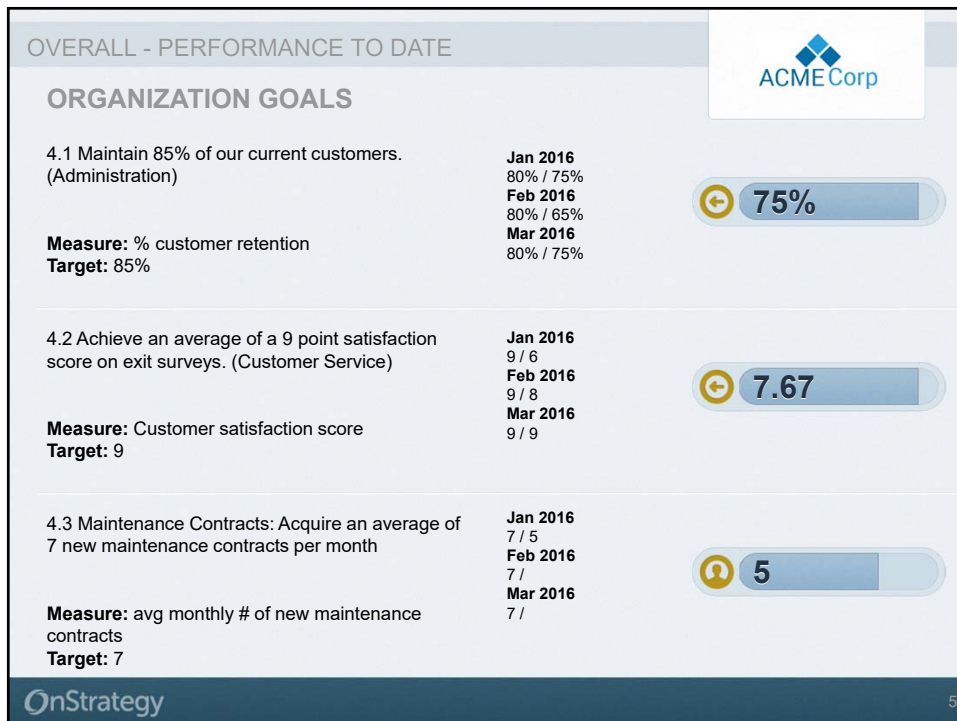1.3 Increase average billable hour factor. (Administration)
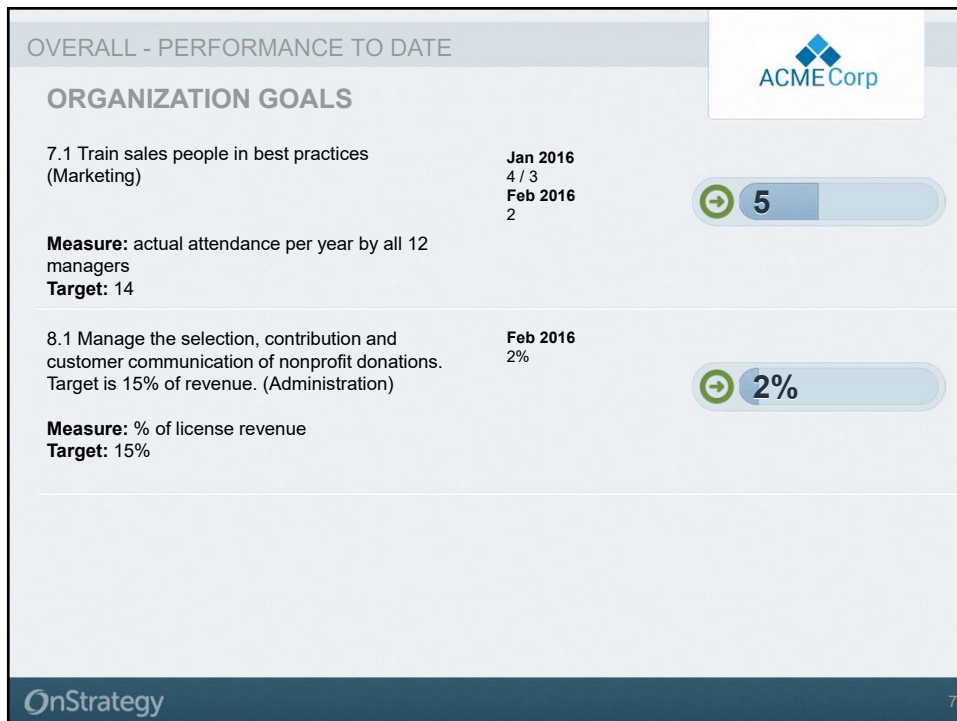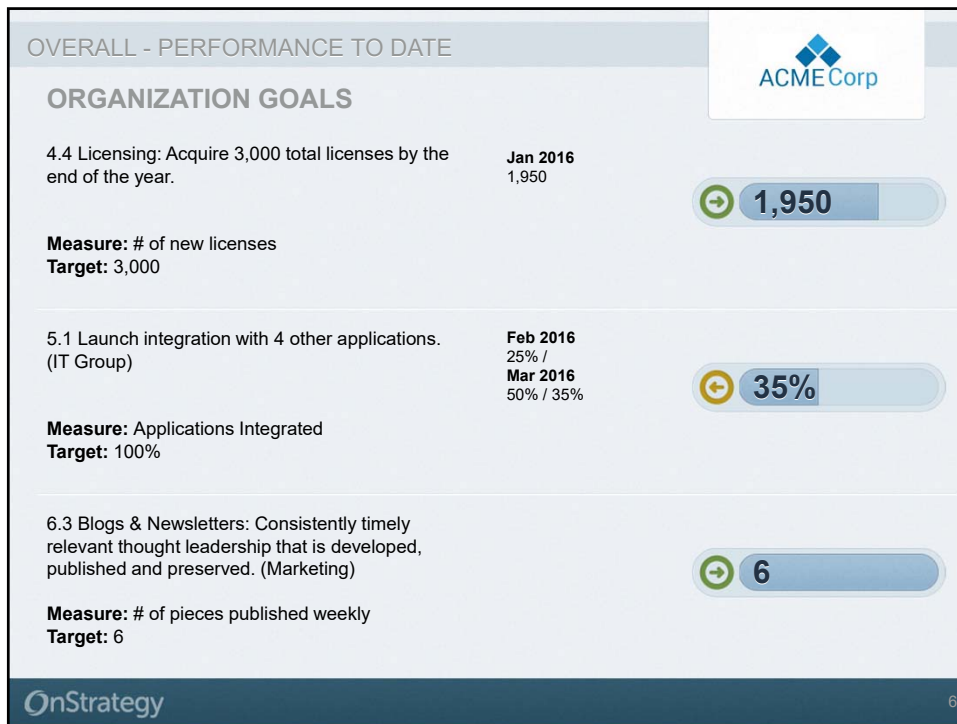
Measure: $ per billable hour.
Target: $300

Jan 2016
$240 / $245
Feb 2016
$240 / $222
Mar 2016
$250 /

$233.50

OnStrategy

3

2

OVERALL - PERFORMANCE TO DATE

ACME Corp

ORGANIZATION GOALS

2.1 Improve customer satisfaction, evidenced by 97% customer satisfaction score.

Measure:
Target:

3.1 Professional Service: Acquire 10 new consulting clients at $10,000+ per month. (Administration)

Measure: # of new consulting clients
Target: 10

Jan 2016
10 / 6
Feb 2016
10 / 12,000
Mar 2016
10 /

12,006

3.2 Industry Expertise: Be rated among the Top 10 fastest growing tech companies in 2016. (Marketing)

Measure: Industry ranking
Target: 10

Feb 2016
10 / 12,000
Mar 2016
10 /

OnStrategy

4

OVERALL - PERFORMANCE TO DATE

ACME Corp

ORGANIZATION GOALS

4.1 Maintain 85% of our current customers. (Administration)

Measure: % customer retention
Target: 85%

Jan 2016
80% / 75%
Feb 2016
80% / 65%
Mar 2016
80% / 75%

75%

4.2 Achieve an average of a 9 point satisfaction score on exit surveys. (Customer Service)

Measure: Customer satisfaction score
Target: 9

Jan 2016
9 / 6
Feb 2016
9 / 8
Mar 2016
9 / 9

7.67

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

Measure: avg monthly # of new maintenance contracts
Target: 7

Jan 2016
7 / 5
Feb 2016
7 /
Mar 2016
7 /

5

OnStrategy

5

OVERALL - PERFORMANCE TO DATE

ACME Corp

ORGANIZATION GOALS

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

Jan 2016
1,950

1,950

Measure: # of new licenses
Target: 3,000

5.1 Launch integration with 4 other applications. (IT Group)

Feb 2016
25% /
Mar 2016
50% / 35%

35%

Measure: Applications Integrated
Target: 100%

6.3 Blogs & Newsletters: Consistently timely relevant thought leadership that is developed, published and preserved. (Marketing)

6

Measure: # of pieces published weekly
Target: 6

OnStrategy   6

OVERALL - PERFORMANCE TO DATE

ACME Corp

ORGANIZATION GOALS

7.1 Train sales people in best practices (Marketing)

Jan 2016
4 / 3
Feb 2016
2

5

Measure: actual attendance per year by all 12 managers
Target: 14

8.1 Manage the selection, contribution and customer communication of nonprofit donations. Target is 15% of revenue. (Administration)

Feb 2016
2%

2%

Measure: % of license revenue
Target: 15%

OnStrategy   7

Administration

JoAnne Rogers

ACME Corp

OnStrategy
8

ADMINISTRATION - PERFORMANCE TO DATE

ACME Corp

DEPARTMENT GOALS

1.1.3 Software Licenses: Generate $300,000 from added software features by the end of each FY.

Measure: $ generated from added software features
Target: $300,000

Jan 2016:
$25,000 / Actual: $30,000
Feb 2016:
$25,000 / Actual: $112,000
Mar 2016:
$25,000 / Actual:

$142,000

4.1.2 Develop a competitive analysis survey for our market.

Measure: % Complete
Target:

0

OnStrategy
9

ACME Corp

Customer Service

Mikey Hougland

OnStrategy

10

CUSTOMER SERVICE - PERFORMANCE TO DATE

ACME Corp

DEPARTMENT GOALS

1.1.1 Professional Consulting: Generate $700,000 in web design consulting.

Measure: $ generated from web design consulting
Target: $700,000

Jan 2016:
$45,000 / Actual: $50,000
Feb 2016:
$45,000 / Actual:
Mar 2016:
$45,000 / Actual:

→ **$50,000**

4.4.4 Maintain or decrease the Churn Rate of Licenses which is currently at 7.99%.

Measure: % Churn
Target: 7.99%

Jan 2016:
Actual: 8.01%

← **8.01%**

OnStrategy

11

IT Group

Nate Platt

ACME Corp

OnStrategy   12

IT GROUP - PERFORMANCE TO DATE   ACME Corp

DEPARTMENT GOALS

3.1.3 Work on new program for....

⊙ 0

Measure:
Target: 50%

4.4.1 Grow average monthly licenses by 40% to   **Jan 2016:**
840   Actual: 600

⊙ 600

Measure: # Licenses
Target: 840

4.4.2 Grow new customer conversions by 100% to   **Jan 2016:**
an average of 78/month.   78 / Actual: 71
                                                  Feb 2016:
                                                  78 / Actual: ⊙ 71
                                                  Mar 2016:
Measure: # of new licenses   78 / Actual:
Target: 78

OnStrategy   13

7

IT GROUP - PERFORMANCE TO DATE

ACME Corp

DEPARTMENT GOALS

4.4.3 Grow new customer trials by 25% to mark of
88 New Trials per month.

⚠ **0**

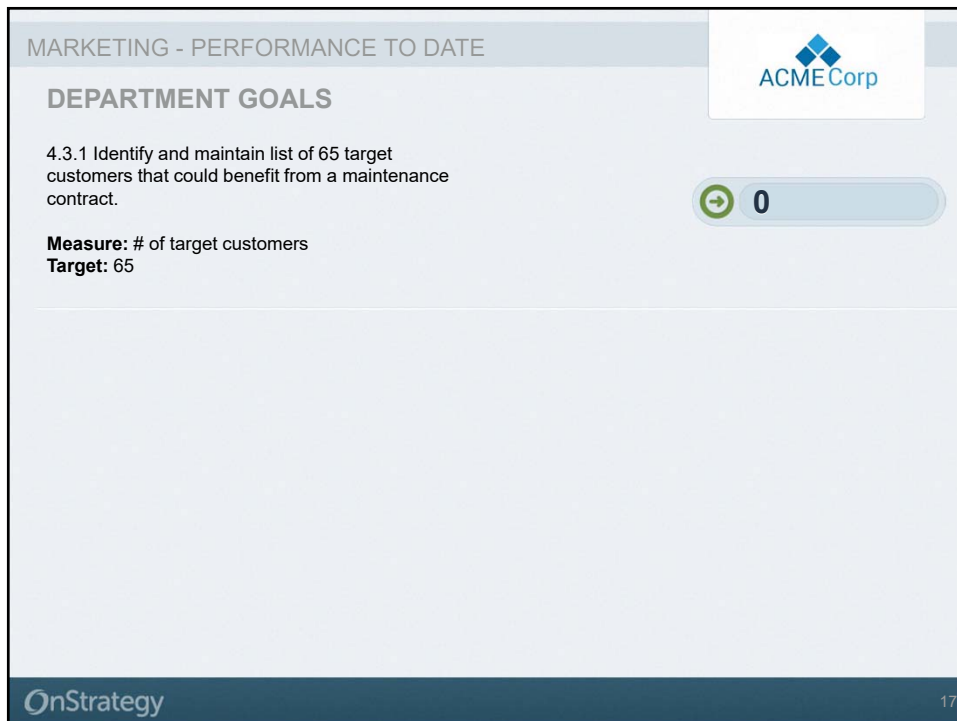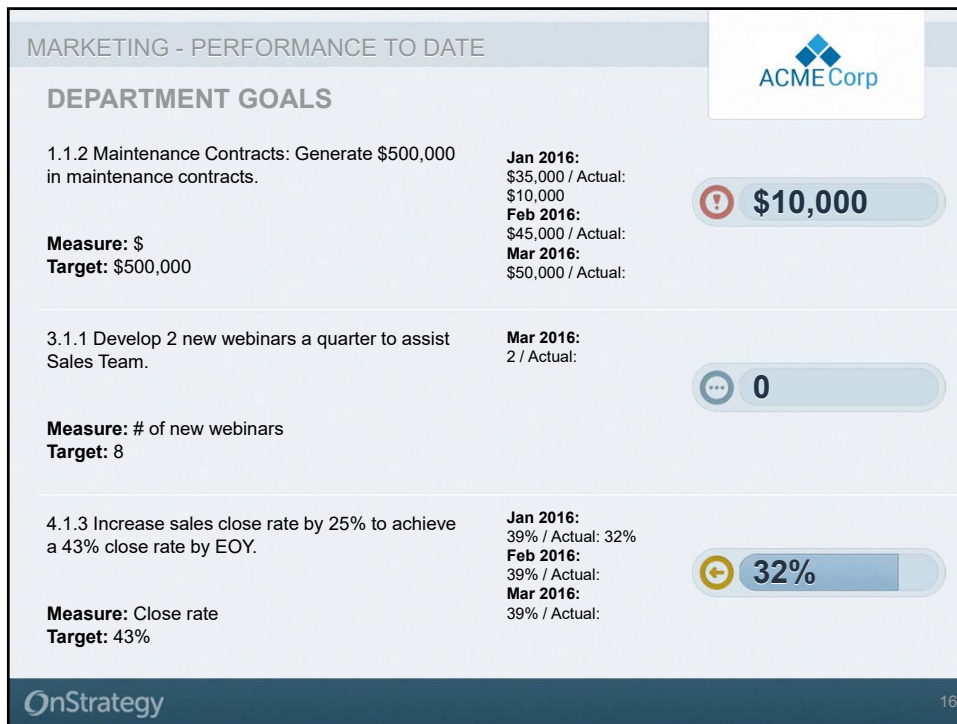**Measure:** # of New Trials
Target: 88

OnStrategy

14

ACME Corp

Marketing

Sales / Marketing VP

OnStrategy

15

MARKETING - PERFORMANCE TO DATE

ACME Corp

DEPARTMENT GOALS

1.1.2 Maintenance Contracts: Generate $500,000 in maintenance contracts.

Jan 2016:
$35,000 / Actual: $10,000
Feb 2016:
$45,000 / Actual:
Mar 2016:
$50,000 / Actual:

⊘ **$10,000**

Measure: $
Target: $500,000

3.1.1 Develop 2 new webinars a quarter to assist Sales Team.

Mar 2016:
2 / Actual:

⊙ **0**

Measure: # of new webinars
Target: 8

4.1.3 Increase sales close rate by 25% to achieve a 43% close rate by EOY.

Jan 2016:
39% / Actual: 32%
Feb 2016:
39% / Actual:
Mar 2016:
39% / Actual:

⟵ **32%**

Measure: Close rate
Target: 43%

OnStrategy

16

MARKETING - PERFORMANCE TO DATE

ACME Corp

DEPARTMENT GOALS

4.3.1 Identify and maintain list of 65 target customers that could benefit from a maintenance contract.

⟶ **0**

Measure: # of target customers
Target: 65

OnStrategy

17

WRAP-UP AND NEXT STEPS

ACME Corp

I.   What needs to be done in response to this meeting?
II. What responsibilities do each of us have to keep the strategic plan moving forward?
III. What is the date of our next Strategy Review Meeting?

OnStrategy   18