

Mission

What is our purpose?

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

Core Values

What are the key guiding principles?

- **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

Competitive Advantages

What do we do best?

- 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

Organization-Wide Strategies

How will we get there?

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.

Strategic Objectives and Organization Goals

Financial

**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

**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

**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.

People/Learning

**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.

**8 Long Term Strategic Objective (No assignment, far reaching and broad based, 3-5 years out) [\*\*Sample Goal Cascading\*\*]**

- 8.1 Organizational Goal (Corporate-wide, generally not assigned, 18-24 months) [\*\*Sample Goal Cascading\*\*]

KPI

How will we measure success?

Measure	Target
\$ in sales	\$2,535,000
\$ per billable hour.	\$300
# of new consulting clients	10
% customer retention	85%
avg monthly # of new maintenance contracts	7

Vision

Where are we going?

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

This is where you type your description.

Implementation

How we make strategy a habit?

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