

How to Read the MyStrategicPlan Strategy Review PowerPoint

- The “Focus for Next Quarter” shows actions that support the goals displayed for the department / team member that happen at any time in the next 3 months.
- The “Accomplishments” shows goals that have been marked as completed for the department / team member.
- If there are no items that meet the criteria for “Accomplished” or “Focus for Next Quarter”, then there will be no slide shown.
- Goals that are tracked as KPIs will have a graph next to them showing the target and actual.
- Goals that are tracked on a project status (% complete) will have a dial gauge next to them.

Reading the KPI Graph:

1. The monthly actuals and targets for the last 3 months are displayed.
(ie: target/actual) If there is no monthly target set, then it just shows actuals.
2. The YTD status is displayed in the graph.
3. The annual target is displayed under the graph.



Reading the Status Gauges:

- The color of the gauge is the same as on the Track My Progress page and is determined by status. (Completed – Accomplished image, On Target – Green, Not Started / Not on Target – Yellow, No Status / Deferred – Grey, Past Due/Critical – Red)
- The number displayed in the gauge is the % complete.





**Acme Co.
Technology**

Acme Corporation Technology

**Strategy Review Meeting
07/19/2012**

- I. Acme Corporation Technology Overview / Performance**
- II. Department Review**
 - Accomplishments to Date**
 - Department Performance / Scorecard**
 - Quarterly Focus**
- III. Strategic Topics / Deep Dive**
- IV. Wrap-Up and Next Steps**

Guest User

Administration: JoAnne Rogers

Customer Service: Mikey Hougland

IT Group: Nate Platt

Sales/Marketing: Alice Hoff

Web Specialists: Greg Smart

ORGANIZATION GOALS

1.1 Generate sales of \$1 million by the end of the year.
(Source:Quick Books) (Administration)

Measure: \$ in sales

April
\$60,000 / \$80,000
May
\$70,000 / \$90,000
June
\$70,000 / \$60,000



Target: \$1,000,000

1.2 Increase average billable hour factor. (Source: Time-tracking Program) (Administration)

Measure: \$ per billable hour.

April
\$120 / \$140
May
\$120 / \$0
June
\$125 /



Target: \$200

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

Measure: % for product development



ORGANIZATION GOALS

2.2 Maintain profitability with a budget allocation of 25% for cash reserves. (Administration)

Measure: % for cash reserves



2.3 Maintain profitability with a budget allocation of 25% for profit sharing (Administration)

Measure: % for profit sharing



3.1 Licensing: Acquire 1,000 total licenses by the end of the year. Eor (Sales/Marketing)

Measure: # of new licenses

April
84 / 99
May
84 / 90
June
84 / 86



Target: 1,000

ORGANIZATION GOALS

3.2 Maintenance Contracts: Acquire an average of 5 new maintenance contracts per month (Sales/Marketing)

Measure: # of new maintenance contracts

April
5 / 6
May
5 /
June
5 /



Target: 5

3.3 Provide new service packages to help clients achieve more success. (Web Specialists)

Measure: # of new packages developed



3.4 Develop understanding of technological issues had by existing customers. (IT Group)

Measure: % complete

April
80% /
May
85% /
June
90% /



Target: 100%

ORGANIZATION GOALS

4.1 Reach a 15% annual increase in new customers over the next 2 years.

Measure: % increase in customer base annually

April
7% /
May
8% /
June
8% /



Target: 15%

4.2 Professional Service: Acquire 3 new consulting clients (of \$5K+) per month. (Sales/Marketing)

Measure: # of consulting clients

April
3 /
May
3 /
June
3 /



Target: 36

5.1 Set up computers to be accessed from any destination. (Customer Service)

Measure: # of computers set up each year



ORGANIZATION GOALS

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

Measure: % of process in writing.



6.1 Attract: Increase the overall traffic to website by 20% (ended 2011 at 145,000 monthly unique visits). (Web Specialists)

Measure: Total visits

April
167,500 /
May
170,000 /
June
174,000 /

169,000

Target: 174,000

6.2 Convert: Increase the number of leads who become customers from 20% to 25%. (Web Specialists)

Measure: # of leads who become customers (Performable)

April
24.50% /
May
25% /
June
25% /

24.05%

Target: 25%

ORGANIZATION GOALS

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

Measure: % complete



7.1 Launch integration with 2 other applications (IT Group)

Measure: % complete



7.2 Complete and launch the API (IT Group)

Measure: % complete



ORGANIZATION GOALS

7.3 Launch a mobile app (ipad & iphone). (IT Group)

Measure: % complete



8.1 Create technology library and resource center (Web Specialists)

Measure: % complete



8.2 Train sales people in best practices (Sales/Marketing)

Measure: actual attendance per year by all 12 managers



ORGANIZATION GOALS

8.3 Develop better communication and presentation skills to increase ability to work with and assist clients. (Customer Service)

Measure: % complete



9.1 Increase the number of innovative ideas through an incentive program. (Administration)

Measure: # of innovative ideas implemented



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

Measure: % of license revenue



ORGANIZATION GOALS

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

Measure: % complete



12.1 To increase the number of new sole source or buying agreements 20% (3-4 more) by end of 2013. (Sales/Marketing)

Measure: # of new sole source/bying agreements

April
5% / 3%
May
5% / 5%
June
5% / 8%



Target: 20%



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Administration

JoAnne Rogers

DEPARTMENT GOALS

4.1.2 Develop a competitive analysis survey for our market.

Measure: % Complete



0%

Target: 100%

6.3.2 Write 2 newsletters per month.

Measure: # of newsletters



0

Target: 2

8.1.1 Research recommended reading list and best practices related to technology

Measure: # of titles collected



10

Target: 50

- Use the internet to locate strategic planning titles, reading lists, professional organizations





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Customer Service

Mikey Hougland

- Develop a program to encourage ideas from everyone.
- Throw a party to kick off incentive program.



DEPARTMENT GOALS

3.1.3 Maintain or decrease the Churn Rate of Licenses which is currently at 8.5%.

Measure: % Churn



8.42%

Target: 8.49%

3.3.2 Complete 3 online focus groups to explore pricing and value of new service packages.

Measure: # of online focus groups held



3.4.1 Research and report on the unique software requirements of existing customers.

Measure: # of responses



DEPARTMENT GOALS

9.1.1 Develop a program to encourage ideas from everyone.

Measure: % complete



9.1.2 Throw a party to kick off incentive program.

Measure: Party held



11.1.1 Department Goal [Corporate Action Item] (Assigned to the Department responsible for seeing t...

Measure: \$





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IT Group

Nate Platt

DEPARTMENT GOALS

1.1.3 Software Licenses: Generate \$300,000

Measure: Number of Completed Sales in Online Shopping Cart



\$89,500

Target: \$300,000

3.1.1 Grow monthly licenses by 40% to 427

Measure: # Licenses



396

Target: 427

3.1.2 Grow new customer trials by 25% to mark of 75 New Trials per month.

Measure: # of New Trials



75

Target: 75

DEPARTMENT GOALS

5.1.1 Investigate international access requirements and document.

Measure: % complete



5.1.2 Purchase necessary software/hardware or make arrangements with an internet service provider fo...

Measure: % complete



7.1.2 Hire a vendor to integrate applications based upon at least 3 proposals.

Measure: % Complete





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Sales/Marketing

Alice Hoff

DEPARTMENT GOALS

1.1.1 Maintenance Contracts: Generate \$500,000 in maintenance contracts

Measure: \$



\$132,300

Target: \$500,000

3.2.1 Identify and maintain list of 50 target customers that could benefit from a maintenance contra

Measure: % Complete



4.1.1 Implement marketing campaign to draw in new markets.

Measure: % completed



DEPARTMENT GOALS

4.1.3 Increase sales close rate by 25%

Measure: % increase in close rate



4.2.1 Obtain 1 new client in the medical market monthly.

Measure: # of new medical clients



Target: 12

4.2.2 Obtain 1 new client in the education field monthly.

Measure: # of new clients in education field



Target: 12

DEPARTMENT GOALS

4.2.3 Obtain 1 new client in the nonprofit sector monthly.

Measure: # of new nonprofit clients



Target: 12

- Create sales copy for new service packages.
- Compile current customer list
- Develop campaign material for new markets.
- Determine budget for party
- Solicit ideas for theme, entertainment, catering.





**Acme Co.
Technology**

Web Specialists

Greg Smart

DEPARTMENT GOALS

1.1.2 Professional Consulting: Generate \$200,000 in web design consulting

Measure: \$



Target: 200,000

3.3.1 Develop web page to promote/sale new service packages.

Measure: % complete



6.1.1 Web site: Update Google AdWords, home page and landing pages on a quarterly basis.

Measure: % Complete



DEPARTMENT GOALS

6.3.1 Write 1 blog post per week

Measure: # of blog posts



7.1.1 Map out entire integration process

Measure: Map completed



- Create new web pages (rough draft) for the campaign promotion.
- Perform quarterly update of website with focus on home page and landing pages.
- Manage high performance of Google AdWords (click through and conversions).
- Launch direct mail program with newsletters
- Team Member Goal (or Dept Actions) (Assigned to Team Member responsible for seeing this goal completed, 6-12 months)



- 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?**