

Acme Corporation Technology

Strategy Review Meeting
12/03/2013

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

Ann Smith

Administration: JoAnne Rogers

Customer Service: Mikey Hougland

IT Group: Nate Platt

Public Policy: Public Policy

Sales/Marketing: Sales / Marketing VP

Web Specialists: Greg Smart

OVERALL - PERFORMANCE TO DATE

ORGANIZATION GOALS



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

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

September
\$100,000 / \$105,000
October
\$100,000 / \$99,000
November
\$100,000 / \$25,000



2.1 Maintain a 20% profit margin in 2013. (Administration)

Measure: % Complete
Target: 100%



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

Measure: % for product development
Target: 50%



OVERALL - PERFORMANCE TO DATE

ORGANIZATION GOALS



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

Measure: \$ per billable hour.
Target: \$200

September
\$160 / \$155
October
\$175 /
November
\$180 /

\$125.56

3.1 Licensing: Acquire 1,000 total licenses by the end of the year. (Operations)

Measure: # of new licenses
Target: 1,000

September
700 /
October
800 /
November
900 /

580

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

Measure: % complete
Target: 100%

September
75% / 75%
October
75% / 75%

75%

OVERALL - PERFORMANCE TO DATE

ORGANIZATION GOALS



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

Measure: avg monthly # of new maintenance contracts

Target: 5

September

5 /

October

5 /

November

5 /



3.75

4.2 Maintain 75% of our current customers. (Customer Service)

Measure: % increase in customer base annually

Target: 85%



85%

5.1 Professional Service: Acquire 2 new consulting clients \$10,000+ per month. (Sales/Marketing)

Measure: # of new consulting clients

Target: 24



33

OVERALL - PERFORMANCE TO DATE

ORGANIZATION GOALS



6.1 Attract: Increase the overall traffic to website by 25% from 2012 by comparing against the same month of the previous year. (Web Specialists)

Measure: Total visits
Target: 181,250

September
170,000 /
October
173,000 /
November
175,000 /



6.2 Acquire: Increase rate of visit to lead from 41% to 1%. (Web Specialists)

Measure: % visits to lead
Target: 1%



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

Measure: # of leads who become customers (Performable)
Target: 25%



OVERALL - PERFORMANCE TO DATE

ORGANIZATION GOALS



7.1 Launch integration with 2 other applications (IT Group)



Measure: % complete

Target: 100%

7.2 Complete and launch the API (IT Group)



Measure: % complete

Target: 100%

8.1 Set up computers to be accessed from any destination. (Administration)



Measure: # of computers set up each year

Target: 5

OVERALL - PERFORMANCE TO DATE

ORGANIZATION GOALS



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



Measure: % of process in writing.

Target: 100%

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



Measure: % complete

Target: 100

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



Measure: actual attendance per year by all 12 managers

Target: 12

OVERALL - PERFORMANCE TO DATE

ORGANIZATION GOALS



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



Measure: % complete in communication/presentation skills

Target: 100%

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



Measure: % of license revenue

Target: 15%

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



Measure: % complete

Target: 100%

Administration

JoAnne Rogers

DEPARTMENT GOALS

1.1.1 Software Licenses: Generate \$300,000



\$123,455

Measure: \$ generated

Target: \$300,000

2.1.1 Maintain a 20% profit margin in 2013.



0%

Measure: % profit margin

Target: 20%

4.2.2 Develop a competitive analysis survey for our market.



114.50%

Measure: % Complete

Target: 100%

DEPARTMENT GOALS

8.3.2 Write 2 newsletters per month.



1.80

Measure: # of newsletters

Target: 2

Customer Service

Mikey Hougland

DEPARTMENT GOALS

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

 25,000

Measure: \$

Target: 200,000

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

 8.40%

Measure: % Churn

Target: 8.49%

IT Group

Nate Platt

DEPARTMENT GOALS

3.1.1 Grow average monthly licenses by 40% to 427



Measure: # Licenses

Target: 427

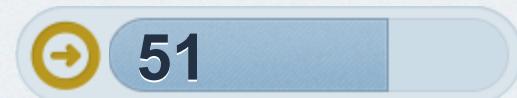
3.1.2 Grow new customer conversions by 100% to an average of 60/month.



Measure: # of new licenses

Target: 60

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



Measure: # of New Trials

Target: 75

DEPARTMENT GOALS

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



55%

Measure: % complete

Target: 100%

9.1.1 Test Goal #1- Develop a program to track the training



0%

Measure: % of program completed

Target: 100%

Public Policy

Public Policy

DEPARTMENT GOALS

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



\$60

Measure: \$

Target: \$5,000

Sales/Marketing

Sales / Marketing VP

DEPARTMENT GOALS

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



Measure: \$

Target: \$500,000

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



Measure: % Complete

Target: 100%

4.2.1 Implement marketing campaign to draw in new markets.



Measure: % completed

Target: 100%

DEPARTMENT GOALS

4.2.3 Increase sales close rate by 25%



15%

Measure: % increase in close rate

Target: 25%

Web Specialists

Greg Smart

DEPARTMENT GOALS

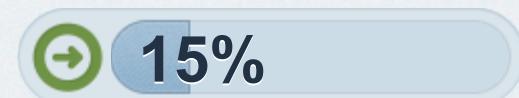
6.1.1 Web site: Update Google AdWords, home page and landing pages on a quarterly basis.



Measure: % Complete

Target: 100%

7.1.1 Map out entire integration process



Measure: Map completed

Target: 100%

8.3.1 Write 1 blog post per week



Measure: # of blog posts

Target: 52

- 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?**