

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

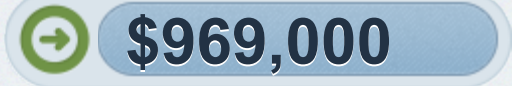
Web Specialists: Greg Smart

ORGANIZATION GOALS

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

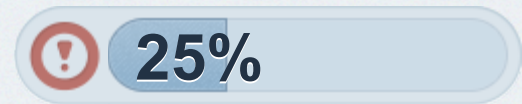
Measure: \$ in sales
Target: \$1,000,000

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%




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%**

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

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 /



165,000

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

Measure: % visits to lead
Target: 1%



0%

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%



10%

ORGANIZATION GOALS

7.1 Launch integration with 2 other applications (IT Group)

Measure: % complete
Target: 100%



100%

7.2 Complete and launch the API (IT Group)

Measure: % complete
Target: 100%



20%

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

Measure: # of computers set up each year
Target: 5



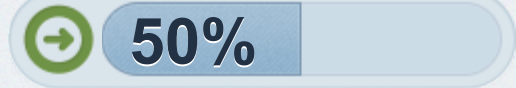
100

ORGANIZATION GOALS

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

Measure: % of process in writing.

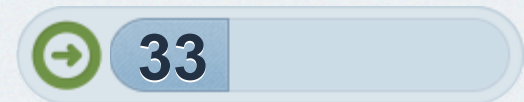
Target: 100%



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

Measure: % complete

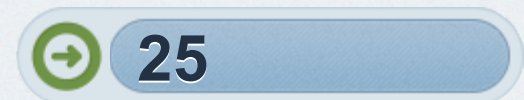
Target: 100



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

Measure: actual attendance per year by all 12 managers

Target: 12



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%



0%

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

Measure: % of license revenue

Target: 15%



35%

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

Measure: % complete

Target: 100%



0%

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

Measure: \$
Target: 200,000

 **25,000**

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

Measure: % Churn
Target: 8.49%

 **8.40%**

IT Group

Nate Platt

DEPARTMENT GOALS

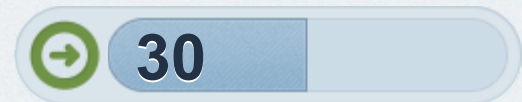
3.1.1 Grow average monthly licenses by 40% to 427

Measure: # Licenses
Target: 427



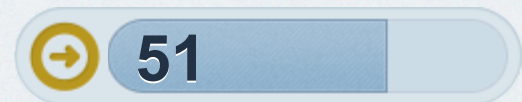
3.1.2 Grow new customer conversions by 100% to an average of 60/month.

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...

Measure: % complete

Target: 100%



55%

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

Measure: % of program completed

Target: 100%



0%

Public Policy

Public Policy

DEPARTMENT GOALS

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

Measure: \$

Target: \$5,000



\$60

Sales/Marketing

Sales / Marketing VP

DEPARTMENT GOALS

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

Measure: \$
Target: \$500,000



➔ \$50,000

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

Measure: % Complete
Target: 100%



➔ 50%

4.2.1 Implement marketing campaign to draw in new markets.

Measure: % completed
Target: 100%



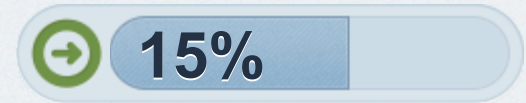
➔ 60%

DEPARTMENT GOALS

4.2.3 Increase sales close rate by 25%

Measure: % increase in close rate

Target: 25%



Web Specialists

Greg Smart

DEPARTMENT GOALS

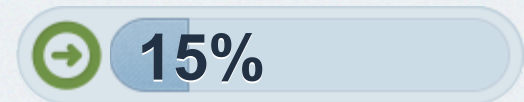
6.1.1 Web site: Update Google AdWords, home page and landing pages on a quarterly basis.

Measure: % Complete
Target: 100%



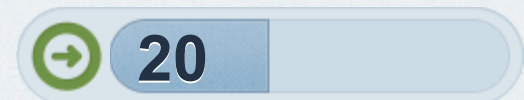
7.1.1 Map out entire integration process

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?**