



Acme Corporation Technology

Strategic Plan As of April 4, 2012



Executive Summary Prepared by M3 Planning

STRATEGIC PLAN - AT-A-GLANCE

FINANCIAL OBJECTIVES & ORGANIZATION GOALS

1 Revenue Growth: Grow our revenue by 30% each year

- 1.1 Generate sales of \$1 million by the end of the year. (Source: Quick Books)
- 1.2 Increase average billable hour factor. (Source: Time-tracking Program)

2 Productivity Improvement: Maintain a 20% Net Profit Margin

- 2.1 Maintain profitability with a budget allocation of 50% for business re-investment for product development.
- 2.2 Maintain profitability with a budget allocation of 25% for cash reserves.
- 2.3 Maintain profitability with a budget allocation of 25% for profit sharing

CUSTOMER OBJECTIVES & ORGANIZATION GOALS

3 Current Customers: To be viewed as the valued and effective technology resource in the western region

- 3.1 Licensing: Acquire 1,000 total licenses by the end of the year. Eor
- 3.2 Maintenance Contracts: Acquire an average of 5 new maintenance contracts per month
- 3.3 Provide new service packages to help clients achieve more success.
- 3.4 Develop understanding of technological issues had by existing customers.

4 New Customers: Increase new customer base by being viewed as the professional partner of choice.

- 4.1 Reach a 15% annual increase in new customers over the next 2 years.
- 4.2 Professional Service: Acquire 3 new consulting clients (of \$5K+) per month.

INTERNAL / OPERATIONAL OBJECTIVES & ORGANIZATION GOALS

5 Administrative 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.

6 Sales/Marketing: Consistently communicate our value proposition across all mediums and increase awareness of our organization.

- 6.1 Attract: Increase the overall traffic to website by 20% (ended 2011 at 145,000 monthly unique visits).
- 6.2 Convert: Increase the number of leads who become customers from 20% to 25%.
- 6.3 Blogs & Newsletters: Consistently timely relevant thought leadership that is developed, published and preserved.

7 Innovation/Product Development: Continue to develop technology innovation.

- 7.1 Launch integration with 2 other applications
- 7.2 Complete and launch the API
- 7.3 Launch a mobile app (ipad & iphone).

PEOPLE / LEARNING OBJECTIVES & ORGANIZATION GOALS

8 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.

- 8.1 Create technology library and resource center
- 8.2 Train sales people in best practices
- 8.3 Develop better communication and presentation skills to increase ability to work with and assist clients.

9 Culture: To align incentives and employee rewards with staff performance.

- 9.1 Increase the number of innovative ideas through an incentive program.

10 Community Involvement: Develop and implement a corporate giving strategy that is in line with our competitive advantages.

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

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

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

STRATEGIC PLAN - DETAIL

FINANCIAL OBJECTIVES & ORGANIZATION GOALS

1 Revenue Growth: Grow our revenue by 30% each year

1.1 Generate sales of \$1 million by the end of the year. (Source:Quick Books) (Administration) (12/31/12)	Measure: \$ in sales	Target: \$1,000,000
Department Goals	Measure	Target
1.1.1 Professional Consulting: Generate \$200,000 in web design consulting (Web Specialists)	\$	200,000
1.1.2 Software Licenses: Generate \$300,000 (IT Group)	Number of Completed Sales in Online Shopping Cart	\$300,000
1.1.3 Maintenance Contracts: Generate \$500,000 in maintenance contracts (Sales/Marketing)	\$	\$500,000
1.2 Increase average billable hour factor. (Source: Time-tracking Program) (Administration) (12/31/12)	Measure: \$ per billable hour.	Target: \$200

2 Productivity Improvement: Maintain a 20% Net Profit Margin

2.1 Maintain profitability with a budget allocation of 50% for business re-investment for product development. (Administration) (12/31/12)	Measure: % for product development	Target: 50%
2.2 Maintain profitability with a budget allocation of 25% for cash reserves. (Administration) (12/31/12)	Measure: % for cash reserves	Target: 25%
2.3 Maintain profitability with a budget allocation of 25% for profit sharing (Administration) (12/31/12)	Measure: % for profit sharing	Target: 25%

3 Current Customers: To be viewed as the valued and effective technology resource in the western region

3.1 Licensing: Acquire 1,000 total licenses by the end of the year. Eor (Sales/Marketing) Measure: # of new licenses Target: 1,000 (12/31/12)

Department Goals	Measure	Target	Start Date, End Date
3.1.1 Grow monthly licenses by 40% to 427 (IT Group)	# Licenses	427	01/01/12 12/31/12
3.1.2 Grow new customer trials by 25% to mark of 75 New Trials per month. (IT Group)	# of New Trials	75	01/01/12 12/31/12
3.1.3 Maintain or decrease the Churn Rate of Licenses which is currently at 8.5%. (Customer Service)	% Churn	8.49%	01/01/12 12/31/12

3.2 Maintenance Contracts: Acquire an average of 5 new maintenance contracts per month (Sales/Marketing) (12/31/12) Measure: # of new maintenance contracts Target: 5

Department Goals	Measure	Target	Start Date, End Date
3.2.1 Identify and maintain list of 50 target customers that could benefit from a maintenance contract. (Sales/Marketing)	% Complete	100%	01/01/12 12/31/12

3.3 Provide new service packages to help clients achieve more success. (Web Specialists) (12/31/12) Measure: # of new packages developed Target: 12

Department Goals	Measure	Target	Start Date, End Date
3.3.1 Develop web page to promote/sale new service packages. (Web Specialists)	% complete	100%	01/01/12 10/31/12
3.3.2 Complete 3 online focus groups to explore pricing and value of new service packages. (Customer Service)	# of online focus groups held	3	01/01/10 06/30/12

3.4 Develop understanding of technological issues had by existing customers. (IT Group) (06/30/12) Measure: % complete Target: 100%

Department Goals	Measure	Target	Start Date, End Date
3.4.1 Research and report on the unique software requirements of existing customers. (Customer Service)	# of responses	200	07/31/11 12/31/12

4 New Customers: Increase new customer base by being viewed as the professional partner of choice.

4.1 Reach a 15% annual increase in new customers over the next 2 years. (Sales/Marketing) (12/31/13) Measure: % increase in customer base annually Target: 15%

Department Goals	Measure	Target	Start Date, End Date
4.1.1 Implement marketing campaign to draw in new markets. (Sales/Marketing)	% completed	100%	01/01/11 12/31/12
4.1.2 Develop a competitive analysis survey for our market. (Administration)	% Complete	100%	06/01/12 12/31/12
4.1.3 Increase sales close rate by 25% (Sales/Marketing)	% increase in close rate	25%	01/01/12 12/31/12

4.2 Professional Service: Acquire 3 new consulting clients (of \$5K+) per month. (Sales/Marketing) (12/31/12) Measure: # of consulting clients Target: 36

Department Goals	Measure	Target	Start Date, End Date
4.2.1 Obtain 1 new client in the medical market monthly. (Sales/Marketing)	# of new medical clients	12	01/01/12 12/31/12
4.2.2 Obtain 1 new client in the education field monthly. (Sales/Marketing)	# of new clients in education field	12	01/01/12 12/31/12
4.2.3 Obtain 1 new client in the nonprofit sector monthly. (Sales/Marketing)	# of new nonprofit clients	12	01/01/12 12/31/12

5 Administrative 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. (Customer Service) (12/31/12)

Measure: # of computers set up each year

Target: 5

Department Goals	Measure	Target	Start Date, End Date
5.1.1 Investigate international access requirements and document. (IT Group)	% complete	100%	01/01/11 10/31/12
5.1.2 Purchase necessary software/hardware or make arrangements with an internet service provider for virtual access. (IT Group)	% complete	100%	01/01/11 12/31/12

5.2 Define all procedures and process in writing in order to support projected growth. (Administration) (12/31/12)

Measure: % of process in writing.

Target: 100%

6 Sales/Marketing: Consistently communicate our value proposition across all mediums and increase awareness of our organization.

6.1 Attract: Increase the overall traffic to website by 20% (ended 2011 at 145,000 monthly unique visits). (Web Specialists) (12/31/12)

Measure: Total visits

Target: 174,000

Department Goals	Measure	Target	Start Date, End Date
6.1.1 Web site: Update Google AdWords, home page and landing pages on a quarterly basis. (Web Specialists)	% Complete	100%	08/01/11 12/30/12

6.2 Convert: Increase the number of leads who become customers from 20% to 25%. (Web Specialists) (12/31/12)

Measure: # of leads who become customers (Performable)

Target: 25%

6.3 Blogs & Newsletters: Consistently timely relevant thought leadership that is developed, published and preserved. (Web Specialists) (12/31/12)

Measure: % complete

Target: 100

Department Goals	Measure	Target	Start Date, End Date
6.3.1 Write 1 blog post per week (Web Specialists)	# of blog posts	52	01/01/12 12/31/12
6.3.2 Write 2 newsletters per month. (Administration)	# of newsletters	2	01/01/12 12/31/12

7 Innovation/Product Development: Continue to develop technology innovation.

7.1 Launch integration with 2 other applications (IT Group) (11/01/12)

Measure: % complete

Target: 100%

Department Goals	Measure	Target	Start Date, End Date
7.1.1 Map out entire integration process (Web Specialists)	Map completed	100%	01/01/12 05/31/12
7.1.2 Hire a vendor to integrate applications based upon at least 3 proposals. (IT Group)	% Complete	100	08/01/12 08/31/12

7.2 Complete and launch the API (IT Group) (12/31/12)

Measure: % complete

Target: 100%

7.3 Launch a mobile app (ipad & iphone). (IT Group) (12/31/13)

Measure: % complete

Target: 100%

8 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.

8.1 Create technology library and resource center (Web Specialists) (09/30/13)	Measure: % complete	Target: 100%
Department Goals	Measure	Target
8.1.1 Research recommended reading list and best practices related to technology (Administration)	# of titles collected	50
8.2 Train sales people in best practices (Sales/Marketing) (12/31/13)	Measure: actual attendance per year by all 12 managers	Target: 12
8.3 Develop better communication and presentation skills to increase ability to work with and assist clients. (Customer Service) (12/31/12)	Measure: % complete	Target: 100%

9 Culture: To align incentives and employee rewards with staff performance.

9.1 Increase the number of innovative ideas through an incentive program. (Administration) (09/30/12)	Measure: # of innovative ideas implemented	Target: 5
Department Goals	Measure	Target
9.1.1 Develop a program to encourage ideas from everyone. (Customer Service)	% complete	100%
9.1.2 Throw a party to kick off incentive program. (Customer Service)	Party held	100%

10 Community Involvement: Develop and implement a corporate giving strategy that is in line with our competitive advantages.

10.1 Manage the selection, contribution and customer communication of nonprofit donations. Target is 15% of revenue. (Administration) (12/31/13)	Measure: % of license revenue	Target: 15%
--	-------------------------------	-------------

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

11.1 Organizational Goal (Corporate-wide, generally not assigned, 18-24 months) [**Sample Goal Cascading**] (Administration) (12/31/13)	Measure: % complete	Target: 100%
Department Goals	Measure	Target
11.1.1 Department Goal [Corporate Action Item] (Assigned to the Department responsible for seeing that the goal and its actions are completed, 12-18 months) (Customer Service)	\$	\$5,000

APPENDIX A: STRATEGIC PLANNING TERMS

Strategic Planning Term	Definition
Core Values/Guiding Principles	How people want to behave with each other in the organization. Value statements describe actions that are the living enactment of the fundamental values held by most individuals within the organization. What are our guiding principles, as a group, to adhere to no matter what?
Core Purpose/Mission Statement	The organization's core purpose. Why do we exist?
Vision Statement (5+ years)	Where you are headed — your future state — your Big, Hairy, Audacious Goal. Where are we going?
Competitive Advantages	A characteristic(s) of an organization that allows it to meet their customer's need(s) better than their competition can. What are we best at in our market?
Organization-Wide Strategies	Your strategies are the general methods you intend to use to reach your vision. A strategy is like an umbrella. It is a general statement(s) that guides and covers a set of activities. You can develop strategies for your whole organization, a department, a specific set of activities, or a guiding statement for a year. No matter what the level, a strategy answers the question "how."
Long-Term Objectives (3+ years)	Long-term, broad, continuous statements that address all areas of your organization. If you have a five-year vision, these would be three- to four-year intermediate guideposts on the way there. What must we focus on to achieve our vision?
Short-Term Goals and Action Items (1 year)	Short-term Goals that convert the Objectives into specific performance targets. Effective Goals clearly state what, when, who and are specifically measurable — they are Specific, Measurable, Attainable, Responsible person, Time bound (SMART). What must we do to achieve our long-term Objectives?
Key Performance Indicators (KPIs)	Metric and non-metric measurements essential to the completion of an organization's goals. Each organization narrows the possible list down to a manageable group of KPIs that make the most difference to performance. KPIs are linked to Goals. How will we know we have achieved our Goals?