



















# Acme Corporation Technology

**Strategic Plan As of April 4, 2012**



*Executive Summary with Progress Prepared by M3 Planning*

## STRATEGIC PLAN - PROGRESS AT-A-GLANCE

| Organization Goals   | Measure                                       | Target      | YTD       | Status  |
|--|---|-------------|-----------|---|
| 1.1 Generate sales of \$1 million by the end of the year. (Source:Quick Books)                                       | \$ in sales                                   | \$1,000,000 | \$175,000 | \$-825,000  |
| 1.2 Increase average billable hour factor. (Source: Time-tracking Program)   | \$ per billable hour.                         | \$200       | \$125     | \$-75   |
| 2.1 Maintain profitability with a budget allocation of 50% for business re-investment for product development.       | % for product development                     | 50%         | 50 %      |    |
| 2.2 Maintain profitability with a budget allocation of 25% for cash reserves.  | % for cash reserves                           | 25%         | 25 %      |    |
| 2.3 Maintain profitability with a budget allocation of 25% for profit sharing  | % for profit sharing                          | 25%         | 30 %      |    |
| 3.1 Licensing: Acquire 1,000 total licenses by the end of the year. Eor  | # of new licenses                             | 1,000       | 271       | -729  |
| 3.2 Maintenance Contracts: Acquire an average of 5 new maintenance contracts per month                               | # of new maintenance contracts                | 5           | 6         | 1   |
| 3.3 Provide new service packages to help clients achieve more success.   | # of new packages developed                   | 12          | 10 %      |    |
| 3.4 Develop understanding of technological issues had by existing customers.   | % complete                                    | 100%        | 85.50%    | -14.50%   |
| 4.1 Reach a 15% annual increase in new customers over the next 2 years.  | % increase in customer base annually          | 15%         | 9%        | -6%   |
| 4.2 Professional Service: Acquire 3 new consulting clients (of \$5K+) per month.                                     | # of consulting clients                       | 36          | 12        | -24   |
| 5.1 Set up computers to be accessed from any destination.  | # of computers set up each year               | 5           | 30 %      |    |
| 5.2 Define all procedures and process in writing in order to support projected growth.                               | % of process in writing.                      | 100%        | 50 %      |   |
| 6.1 Attract: Increase the overall traffic to website by 20% (ended 2011 at 145,000 monthly unique visits).           | Total visits                                  | 174,000     | 169,000   | -5,000  |
| 6.2 Convert: Increase the number of leads who become customers from 20% to 25%.                                      | # of leads who become customers (Performable) | 25%         | 24.05%    | -0.95%  |
| 6.3 Blogs & Newsletters: Consistently timely relevant thought leadership that is developed, published and preserved. | % complete                                    | 100         | 33 %      |  |
| 7.1 Launch integration with 2 other applications   | % complete                                    | 100%        | 100 %     |  |
| 7.2 Complete and launch the API  | % complete                                    | 100%        | 0 %       |  |
| 7.3 Launch a mobile app (ipad & iphone).   | % complete                                    | 100%        | 0 %       |  |
| 8.1 Create technology library and resource center  | % complete                                    | 100%        | 0 %       |  |
| 8.2 Train sales people in best practices   | actual attendance per year by all 12 managers | 12          | 25 %      |  |
| 8.3 Develop better communication and presentation skills to increase ability to work with and assist clients.        | % complete                                    | 100%        | 0 %       |  |
| 9.1 Increase the number of innovative ideas through an incentive program.  | # of innovative ideas implemented             | 5           | 63 %      |  |
| 10.1 Manage the selection, contribution and customer communication of nonprofit donations. Target is 15% of revenue. | % of license revenue                          | 15%         | 20 %      |  |
| 11.1 Organizational Goal (Corporate-wide, generally not assigned, 18-24 months) [**Sample Goal Cascading**]          | % complete                                    | 100%        | 0 %       |  |

# STRATEGIC PLAN - PROGRESS 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    YTD: \$175,000    \$-825,000

| Department Goals  | Start Date, End Date | Target, Measure   | YTD       | Status     |
|---|----------------------|---|-----------|------------|
| 1.1.1 Professional Consulting: Generate \$200,000 in web design consulting (Web Specialists)<br><i>Comments on Status: 03/27/12 - finally achieved (VL) 03/22/12 - Test (VL)</i>  | 01/01/12, 12/31/12   | 200,000 \$  | 54,700    | -145,300   |
| 1.1.2 Software Licenses: Generate \$300,000 (IT Group)<br><i>Comments on Status: 2/23/12- finally achieved (VL) 1/25/12 - actually not done 12/21/11 - goal was achieved (VL) 10/27/11 - Behind schedule (VL) 7/28/11 - Falling behind. (VL) 6/23/11 - Moving along quickly (VL) Meeting with Mr. Smith 9/29/11</i> | 01/01/11, 12/31/12   | \$300,000 Number of Completed Sales in Online Shopping Cart | \$89,500  | \$-210,500 |
| 1.1.3 Maintenance Contracts: Generate \$500,000 in maintenance contracts (Sales/Marketing)<br><i>Comments on Status: Test comment</i>   | 01/01/12, 12/31/12   | \$500,000 \$  | \$132,300 | \$-367,700 |

**1.2 Increase average billable hour factor. (Source: Time-tracking Program) (Administration) (12/31/12)**

Measure: \$ per billable hour.    Target: \$200    YTD: \$125    \$-75

*Comments on Status: 5/6/10 Increase our rates on new proposals*

### 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%    YTD: 50 %

*Comments on Status: 3-28-2012: We are well on our way to funding the product. Waiting for Mary.*

**2.2 Maintain profitability with a budget allocation of 25% for cash reserves. (Administration) (12/31/12)**

Measure: % for cash reserves    Target: 25%    YTD: 25 %

*Comments on Status: comment*

**2.3 Maintain profitability with a budget allocation of 25% for profit sharing (Administration) (12/31/12)**

Measure: % for profit sharing    Target: 25%    YTD: 30 %





### 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) (12/31/12)** Measure: # of new licenses Target: 1,000 YTD: 271 -729

| Department Goals   | Start Date, End Date | Target, Measure       | YTD   | Status |
|--|----------------------|-----------------------|-------|--------|
| 3.1.1 Grow monthly licenses by 40% to 427 (IT Group)   | 01/01/12, 12/31/12   | 427<br># Licenses     | 396   | -31    |
| 3.1.2 Grow new customer trials by 25% to mark of 75 New Trials per month. (IT Group)                 | 01/01/12, 12/31/12   | 75<br># of New Trials | 75    | 0      |
| 3.1.3 Maintain or decrease the Churn Rate of Licenses which is currently at 8.5%. (Customer Service) | 01/01/12, 12/31/12   | 8.49%<br>% Churn      | 8.42% | -0.07% |


**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 YTD: 6 1

| Department Goals  | Start Date, End Date | Target, Measure    | YTD | Status  |
|---|----------------------|--------------------|-----|---|
| 3.2.1 Identify and maintain list of 50 target customers that could benefit from a maintenance contract. (Sales/Marketing) | 01/01/12, 12/31/12   | 100%<br>% Complete | 0 % |  |

**3.3 Provide new service packages to help clients achieve more success. (Web Specialists) (12/31/12)** Measure: # of new packages developed Target: 12 YTD: 10 % 




| Department Goals   | Start Date, End Date | Target, Measure                    | YTD  | Status  |
|--|----------------------|------------------------------------|------|---|
| 3.3.1 Develop web page to promote/sale new service packages. (Web Specialists)   | 01/01/12, 10/31/12   | 100%<br>% complete                 | 62 % |  |
| 3.3.2 Complete 3 online focus groups to explore pricing and value of new service packages. (Customer Service)<br><i>Comments on Status: Completed ahead of schedule.</i> | 01/01/10, 06/30/12   | 3<br># of online focus groups held | 50 % |  |

**3.4 Develop understanding of technological issues had by existing customers. (IT Group) (06/30/12)** Measure: % complete Target: 100% YTD: 85.50% -14.50%

| Department Goals  | Start Date, End Date | Target, Measure       | YTD  | Status  |
|---|----------------------|-----------------------|------|---|
| 3.4.1 Research and report on the unique software requirements of existing customers. (Customer Service)<br><i>Comments on Status: Sent out first blast on May 1</i> | 07/31/11, 12/31/12   | 200<br># of responses | 10 % |  |

### 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% YTD: 9% -6%  
*Comments on Status: 04/01/2010 - Changed the strategy 03/21/2011 - Using new advertising method*

| Department Goals   | Start Date, End Date | Target, Measure            | YTD  | Status  |
|--|----------------------|----------------------------|------|---|
| 4.1.1 Implement marketing campaign to draw in new markets. (Sales/Marketing)<br><i>Comments on Status: 4/01/10 - Initial materials completed for marketing campaign.</i> | 01/01/11, 12/31/12   | 100%<br>% completed        | 55 % |  |
| 4.1.2 Develop a competitive analysis survey for our market. (Administration)<br><i>Comments on Status: Waiting on Tim for report.</i>                                    | 06/01/12, 12/31/12   | 100%<br>% Complete         | 35 % |  |
| 4.1.3 Increase sales close rate by 25% (Sales/Marketing)   | 01/01/12, 12/31/12   | 25%<br>% increase in close | 10 % |  |

|                             |          |               |  |  |
|-----------------------------|----------|---------------|--|--|
| Comments on Status: Comment | 12/31/12 | increase rate |  |  |
|-----------------------------|----------|---------------|--|--|

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

Measure: # of consulting clients

Target: 36

YTD: 12

-24

| Department Goals   | Start Date, End Date | Target, Measure                           | YTD | Status |
|--|----------------------|---|-----|--------|
| 4.2.1 Obtain 1 new client in the medical market monthly. (Sales/Marketing)   | 01/01/12, 12/31/12   | 12<br># of new medical clients            | 3   | -9     |
| 4.2.2 Obtain 1 new client in the education field monthly. (Sales/Marketing)  | 01/01/12, 12/31/12   | 12<br># of new clients in education field | 3   | -9     |
| 4.2.3 Obtain 1 new client in the nonprofit sector monthly. (Sales/Marketing) | 01/01/12, 12/31/12   | 12<br># of new nonprofit clients          | 2   | -10    |

## 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

YTD: 30 %



Comments on Status: 30 more computers were added in March.

| Department Goals   | Start Date, End Date | Target, Measure | YTD  | Status |
|--|----------------------|-----------------|------|--------|
| 5.1.1 Investigate international access requirements and document. (IT Group)<br><i>Comments on Status: Report is almost complete, but waiting for information from Munich.</i>   | 01/01/11, 10/31/12   | 100% % complete | 75 % |        |
| 5.1.2 Purchase necessary software/hardware or make arrangements with an internet service provider for virtual access. (IT Group)<br><i>Comments on Status: Begun price comparisons, but have yet to hear back from the finance department.</i> | 01/01/11, 12/31/12   | 100% % complete | 45 % |        |

### 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%

YTD: 50 %



Comments on Status: Waiting for Sue

## 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

YTD: 169,000

-5,000

| Department Goals  | Start Date, End Date | Target, Measure | YTD  | Status |
|---|----------------------|-----------------|------|--------|
| 6.1.1 Web site: Update Google AdWords, home page and landing pages on a quarterly basis. (Web Specialists)<br><i>Comments on Status: A little behind, but almost there!</i> | 08/01/11, 12/30/12   | 100% % Complete | 85 % |        |

### 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%

YTD: 24.05%

-0.95%

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

Measure: % complete

Target: 100

YTD: 33 %



| Department Goals                                      | Start Date, End Date | Target, Measure    | YTD  | Status |
|---|----------------------|--------------------|------|--------|
| 6.3.1 Write 1 blog post per week (Web Specialists)    | 01/01/12, 12/31/12   | 52 # of blog posts | 20 % |        |
| 6.3.2 Write 2 newsletters per month. (Administration) | 01/01/12, 12/31/12   | 2 # of newsletters | 33 % |        |

## 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%

YTD: 100 %



| Department Goals   | Start Date, End Date | Target, Measure    | YTD  | Status |
|--|----------------------|--------------------|------|--------|
| 7.1.1 Map out entire integration process (Web Specialists)<br><i>Comments on Status: In progress, but this is a monster task and will likely take longer than the target date that has been set.</i> | 01/01/12, 05/31/12   | 100% Map completed | 15 % |        |
| 7.1.2 Hire a vendor to integrate applications based upon at least 3 proposals. (IT Group)  | 08/01/12, 08/31/12   | 100 % Complete     | 80 % |        |

|  |                     |              |          |   |
|--|---------------------|--------------|----------|---|
| 7.2 Complete and launch the API (IT Group) (12/31/12)          | Measure: % complete | Target: 100% | YTD: 0 % |   |
| 7.3 Launch a mobile app (ipad & iphone). (IT Group) (12/31/13) | Measure: % complete | Target: 100% | YTD: 0 % |  |

**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%

YTD: 0 %



| Department Goals  | Start Date,<br>End Date | Target,<br>Measure             | YTD | Status |
|---|-------------------------|--------------------------------|-----|--------|
| 8.1.1 Research recommended reading list and best practices related to technology (Administration) | 10/01/12,<br>12/31/13   | 50<br># of titles<br>collected | 10  | -40    |

**8.2 Train sales people in best practices (Sales/Marketing) (12/31/13)**

Measure:  
actual  
attendance  
per year by all  
12 managers

Target: 12

YTD: 25 %



**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%

YTD: 0 %



**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

YTD: 63 %



| Department Goals   | Start Date,<br>End Date | Target,<br>Measure | YTD   | Status |
|--|-------------------------|--------------------|-------|--------|
| 9.1.1 Develop a program to encourage ideas from everyone. (Customer Service) | 01/01/12,<br>09/30/12   | 100%<br>% complete | 100 % | ✓      |
| 9.1.2 Throw a party to kick off incentive program. (Customer Service)        | 01/01/12,<br>09/30/12   | 100%<br>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%

YTD: 20 %



Comments on Status: We need a new / better process to monitor and publish.

**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%

YTD: 0 %



| Department Goals  | Start Date,<br>End Date | Target,<br>Measure | YTD  | Status |
|---|-------------------------|--------------------|------|--------|
| 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) | 01/01/11,<br>02/01/12   | \$5,000<br>\$      | 60 % | ●      |

Comments on Status: Numbers calculated from accountant for first quarter.



