



# 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

<b>1.1 Generate sales of \$1 million by the end of the year. (Source:Quick Books) (Administration) (12/31/12)</b>	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)  <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)  <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)  <i>Comments on Status: Test comment</i>	01/01/12, 12/31/12	\$500,000 \$	\$132,300	\$-367,700
<b>1.2 Increase average billable hour factor. (Source: Time-tracking Program) (Administration) (12/31/12)</b>	Measure: \$ per billable hour.	Target: \$200	YTD: \$125	\$-75
<i>Comments on Status: 5/6/10 Increase our rates on new proposals</i>				

#### 2 Productivity Improvement: Maintain a 20% Net Profit Margin

<b>2.1 Maintain profitability with a budget allocation of 50% for business re-investment for product development. (Administration) (12/31/12)</b>	Measure: % for product development	Target: 50%	YTD: 50 %	
<i>Comments on Status: 3-28-2012: We are well on our way to funding the product. Waiting for Mary.</i>				
<b>2.2 Maintain profitability with a budget allocation of 25% for cash reserves. (Administration) (12/31/12)</b>	Measure: % for cash reserves	Target: 25%	YTD: 25 %	
<i>Comments on Status: comment</i>				
<b>2.3 Maintain profitability with a budget allocation of 25% for profit sharing (Administration) (12/31/12)</b>	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 # 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 # 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% % 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% % 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% % complete	62 %	
3.3.2 Complete 3 online focus groups to explore pricing and value of new service packages. (Customer Service)	01/01/10, 06/30/12	3 # of online focus groups held	50 %	
<i>Comments on Status: Completed ahead of schedule.</i>				

**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)	07/31/11, 12/31/12	200 # of responses	10 %	
<i>Comments on Status: Sent out first blast on May 1</i>				

**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)	01/01/11, 12/31/12	100% % completed	55 %	
<i>Comments on Status: 4/01/10 - Initial materials completed for marketing campaign.</i>				
4.1.2 Develop a competitive analysis survey for our market. (Administration)	06/01/12, 12/31/12	100% % Complete	35 %	
<i>Comments on Status: Waiting on Tim for report.</i>				
4.1.3 Increase sales close rate by 25% (Sales/Marketing)	01/01/12, 12/31/12	25% % increase in close	10 %	

**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 # 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 # 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 # 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) <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) <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) <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) <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)

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

Measure: % complete  
Target: 100%  
YTD: 0 %



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, End Date	Target, Measure	YTD	Status
8.1.1 Research recommended reading list and best practices related to technology (Administration)	10/01/12, 12/31/13	50 # of titles 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, End Date	Target, Measure	YTD	Status
9.1.1 Develop a program to encourage ideas from everyone. (Customer Service)	01/01/12, 09/30/12	100% % complete	100 %	
9.1.2 Throw a party to kick off incentive program. (Customer Service)	01/01/12, 09/30/12	100% 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 %	
<i>Comments on Status: We need a new / better process to monitor and publish.</i>				

**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, End Date	Target, 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, 02/01/12	\$5,000 \$	60 %	
<i>Comments on Status: Numbers calculated from accountant for first quarter.</i>				

