



Acme Corporation Technology

Strategic Plan As of December 3, 2013

OnStrategy

Executive Summary w/Progress Prepared by OnStrategy

MISSION STATEMENT

The mission of Acme Corporation Technology is to create technology solutions for forward-thinking organizations.

VISION STATEMENT

To be known as the technology experts and resource center for small to medium-sized organizations.

CORE VALUES

Purpose & Growth - our foundation is built on our purpose and provides a place for our team's passion
Client Focus - a razor-sharp focus on our customer's growth is essential and the only way to succeed.
Integrity - to have honesty and respect for all individuals.
Leadership - to empower and inspire entrepreneurial leaders.
Professionalism - to be professional in our actions to our clients, partners and each other.
Excellence - to continually pursue knowledge and learn.
Community Service - to effectively help organizations to make an impact.
Fun - to have enjoyment and fulfillment in our work

COMPETITIVE ADVANTAGES

Reoccurring revenue that is scalable
Assets and software products in place outside our services
Innovative in marrying business process with technology
Business Network - domestic and international
Patented Intellectual Property - interactive, integrated web-based

ORGANIZATION-WIDE STRATEGIES

Organization-Wide Focus:
2013 - Lay the foundation for the organization.
2014 - Execute a market penetration strategy to increase top line.
2015 - Standardization of all processes.
2016 - Develop the infrastructure to prepare for high growth.

CUSTOMER SEGMENTS

Current Customers

Has an existing system in place. Needs minimal to maximum coaching through the package selection process and installation. Willing to hire someone. Willing to commit time, money and staff. Willing to be facilitated throughout the process.

Program or Product

Describe how program or product are service people.

Needs a quick solution to focus and guide their business. Needs a tool to get started. Want a self-support product. Desire to move their business to the next level. Ready to commit time and money to their information systems. Do it-yourselfs. Not necessarily sole-proprietors. Needs to be easy, practical and simple. Linear use. Do it and it is done. More than 5 employees.
Established business.

Size of market: # of Small Businesses: 5.5 million # of Sole Proprietors: 17 million # of Women-Owned Business: 34% # of Businesses in our City: 7,000

New Customers

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	\$969,000	 \$-31,000 As of 12/03/13
2.1 Maintain a 20% profit margin in 2013.	% Complete	100%	25%	 As of 09/24/13
2.2 Maintain profitability with a budget allocation of 50% for business re-investment for product development.	% for product development	50%	30%	 As of 11/05/13
2.3 Increase average billable hour factor. (Source: Time-tracking Program)	\$ per billable hour.	\$200	\$125.56	 \$-74.44 As of 10/24/13
3.1 Licensing: Acquire 1,000 total licenses by the end of the year.	# of new licenses	1,000	580	 -420 As of 11/04/13
3.2 Develop understanding of technological issues had by existing customers.	% complete	100%	75%	 -25% As of 12/02/13
4.1 Maintenance Contracts: Acquire an average of 5 new maintenance contracts per month	avg monthly # of new maintenance contracts	5	3.75	 -1.25 As of 10/28/13
4.2 Maintain 75% of our current customers.	% increase in customer base annually	85%	85%	 As of 09/24/13
5.1 Professional Service: Acquire 2 new consulting clients \$10,000+ per month.	# of new consulting clients	24	33	 As of 01/21/13
6.1 Attract: Increase the overall traffic to website by 25% from 2012 by comparing against the same month of the previous year (ended 2012 at 145,000 monthly unique visits).	Total visits	181,250	165,000	 -16,250 As of 09/24/13
6.2 Acquire: Increase rate of visit to lead from .41% to 1%.	% visits to lead	1%	0%	 As of 09/24/13
6.3 Convert: Increase the number of leads who become customers from 20% to 25%.	# of leads who become customers (Performable)	25%	10%	 As of 09/24/13
7.1 Launch integration with 2 other applications	% complete	100%	100%	 As of 09/24/13
7.2 Complete and launch the API	% complete	100%	20%	 As of 02/04/13
8.1 Set up computers to be accessed from any destination.	# of computers set up each year	5	100	 As of 12/03/13
8.2 Define all procedures and process in writing in order to support projected growth.	% of process in writing.	100%	50%	 As of 09/24/13
8.3 Blogs & Newsletters: Consistently timely relevant thought leadership that is developed, published and preserved.	% complete	100	33	 As of 09/24/13
9.1 Train sales people in best practices	actual attendance per year by all 12 managers	12	25	 As of 10/28/13
9.2 Develop better communication and presentation skills to increase ability to work with and assist clients.	% complete in communication/presentation skills	100%	0%	 As of 10/28/13
10.1 Manage the selection, contribution and customer communication of nonprofit donations. Target is 15% of revenue.	% of license revenue	15%	35%	 As of 08/07/13
11.1 Organizational Goal (Corporate-wide, generally not assigned, 18-24 months) [*Sample Goal Cascading**]	% complete	100%	0%	 As of 07/08/13

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) (12/31/13)	Measure: \$ in sales	Target: \$1,000,000	YTD: \$969,000	Status:  \$-31,000 As of 12/03/13
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Department Goals	Start Date, End Date	Target, Measure	YTD	Status
1.1.1 Software Licenses: Generate \$300,000 (Administration)	01/01/15, 12/31/15	\$300,000 \$ generated	\$123,455	 \$-176,545 As of 09/24/13
1.1.2 Maintenance Contracts: Generate \$500,000 in maintenance contracts (Sales/Marketing)	01/01/13, 12/31/13	\$500,000 \$	\$50,000	 \$-450,000 As of 09/24/13
1.1.3 Professional Consulting: Generate \$200,000 in web design consulting (Customer Service)	01/01/13, 12/31/13	200,000 \$	25,000	 -175,000 As of 01/30/13

2 Productivity Improvement: Maintain a 20% Net Profit Margin each year

2.1 Maintain a 20% profit margin in 2013. (Administration)	Measure: % Complete	Target: 100%	YTD: 25%	Status:  As of 09/24/13
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Department Goals	Start Date, End Date	Target, Measure	YTD	Status
2.1.1 Maintain a 20% profit margin in 2013. (Administration)	12/31/13	20% % profit margin	0%	 As of 11/18/13
2.2 Maintain profitability with a budget allocation of 50% for business re-investment for product development. (Administration) (12/31/13)	Measure: % for product development	Target: 50%	YTD: 30%	 As of 11/05/13
2.3 Increase average billable hour factor. (Source: Time-tracking Program) (Administration) (12/31/13)	Measure: \$ per billable hour.	Target: \$200	YTD: \$125.56	 \$-74.44 As of 10/24/13

3 Licensing: Be viewed as the valued online resource

3.1 Licensing: Acquire 1,000 total licenses by the end of the year. (Operations) (12/31/13)	Measure: # of new licenses	Target: 1,000	YTD: 580	Status:  -420 As of 11/04/13
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Department Goals	Start Date, End Date	Target, Measure	YTD	Status
3.1.1 Grow average monthly licenses by 40% to 427 (IT Group)	01/01/13, 12/31/13	427 # Licenses	385	 -42 As of 09/13/13
3.1.2 Grow new customer conversions by 100% to an average of 60/month. (IT Group)	01/01/13, 12/31/13	60 # of new licenses	30	 As of 06/03/13
3.1.3 Grow new customer trials by 25% to mark of 75 New Trials per month. (IT Group)	01/01/13, 12/31/13	75 # of New Trials	51	 -24 As of 09/13/13
3.1.4 Maintain or decrease the Churn Rate of Licenses which is currently at 8.5%. (Customer Service)	01/01/13, 12/31/13	8.49% % Churn	8.40%	 -0.09% As of 01/21/13

3.2 Develop understanding of technological issues had by existing customers. (IT Group) (10/30/13)	Measure: % complete	Target: 100%	YTD: 75%	Status:  -25% As of 12/02/13
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4 Maintenance Contracts: To be viewed as the top technology resource in the western region.

4.1 Maintenance Contracts: Acquire an average of 5 new maintenance contracts per month (Sales/Marketing) (12/31/13)	Measure: avg monthly # of new maintenance contracts	Target: 5	YTD: 3.75	Status:  -1.25 As of 10/28/13
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Department Goals	Start Date, End Date	Target, Measure	YTD	Status
4.1.1 Identify and maintain list of 50 target customers that could benefit from a maintenance contract. (Sales/Marketing)	01/01/13, 12/31/13	100% % Complete	50%	 As of 07/30/13
4.2 Maintain 75% of our current customers. (Customer Service) (02/01/13)	Measure: % increase in customer base annually	Target: 85%	YTD: 85%	Status:  As of 09/24/13

Department Goals	Start Date, End Date	Target, Measure	YTD	Status
4.2.1 Implement marketing campaign to draw in new markets. (Sales/Marketing) <i>Comments on Status: 10/1/13 Comment</i>	01/01/13, 12/31/13	100% % completed	60%	 As of 11/22/13
4.2.2 Develop a competitive analysis survey for our market. (Administration)	06/01/13, 12/31/13	100% % Complete	114.50%	 14.50% As of 09/24/13
4.2.3 Increase sales close rate by 25% (Sales/Marketing)	01/01/13, 12/31/13	25% % increase in close rate	15%	 As of 08/06/13

5 Professional Services: To be the professional partner of choice.

5.1 Professional Service: Acquire 2 new consulting clients \$10,000+ per	Measure:	Target:	YTD:	Status:
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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 25% from 2012 by comparing against the same month of the previous year (ended 2012 at 145,000 monthly unique visits). (Web Specialists) (12/31/13)

Measure:
Total visits

Target:
181,250

YTD:
165,000

Status:

-16,250
As of 09/24/13

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)	08/01/13, 12/30/13	100% % Complete	85%	 As of 09/24/13
6.2 Acquire: Increase rate of visit to lead from .41% to 1%. (Web Specialists)	Measure: % visits to lead	Target: 1%	YTD: 0%	Status:  As of 09/24/13
6.3 Convert: Increase the number of leads who become customers from 20% to 25%. (Web Specialists) (12/31/13)	Measure: # of leads who become customers (Performable)	Target: 25%	YTD: 10%	Status:  As of 09/24/13

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

7.1 Launch integration with 2 other applications (IT Group) (11/01/13)

Measure:
% complete

Target:
100%

YTD:
100%

Status:

As of 09/24/13

Department Goals	Start Date, End Date	Target, Measure	YTD	Status
7.1.1 Map out entire integration process (Web Specialists)	01/01/13, 12/31/13	100% Map completed	15%	 As of 09/24/13
7.2 Complete and launch the API (IT Group) (12/31/13)	Measure: % complete	Target: 100%	YTD: 20%	Status:  As of 02/04/13

8 Overall Operations: Develop and maintain an infrastructure that allows for a virtual office and efficient overhead.

8.1 Set up computers to be accessed from any destination. (Administration) (12/31/13)

Measure:
of computers set up each year

Target:
5

YTD:
100

Status:

As of 12/03/13

Department Goals	Start Date, End Date	Target, Measure	YTD	Status
8.1.1 Purchase necessary software/hardware or make arrangements with an internet service provider for virtual access. (IT Group)	01/01/13, 12/31/13	100% % complete	55%	 As of 09/24/13
8.2 Define all procedures and process in writing in order to support projected growth. (Administration) (12/31/13)	Measure: % of process in writing.	Target: 100%	YTD: 50%	Status:  As of 09/24/13
8.3 Blogs & Newsletters: Consistently timely relevant thought leadership that is developed, published and preserved. (Sales/Marketing) (12/31/13)	Measure: % complete	Target: 100	YTD: 33	Status:  As of 09/24/13

8.3.2 Write 2 newsletters per month. (Admin Specialties)	12/31/13	# of posts	1.80	As of 09/24/13
8.3.2 Write 2 newsletters per month. (Administration)	01/01/13, 12/31/13	2 # of newsletters	1.80	 -0.20 As of 09/24/13

9 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.

9.1 Train sales people in best practices (Sales/Marketing) (12/31/14)	Measure: actual attendance per year by all 12 managers	Target: 12	YTD: 25	Status:  As of 10/28/13
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Department Goals	Start Date, End Date	Target, Measure	YTD	Status
9.1.1 Test Goal #1- Develop a program to track the training (IT Group)	01/01/13, 12/31/14	100% % of program completed	0%	 As of 11/11/13

9.2 Develop better communication and presentation skills to increase ability to work with and assist clients. (Customer Service) (12/31/13)	Measure: % complete in communication/presentation skills	Target: 100%	YTD: 0%	Status:  As of 10/28/13
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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) (12/31/14)	Measure: % of license revenue	Target: 15%	YTD: 35%	Status:  As of 08/07/13
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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**] (Operations) (12/31/14)	Measure: % complete	Target: 100%	YTD: 0%	Status:  As of 07/08/13
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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) (Public Policy)	01/01/13, 09/01/13	\$5,000 \$	\$60	 As of 07/08/13