



Acme Corporation Technology

Strategic Plan As of April 4, 2012



Full Strategic Plan with Progress Prepared by M3 Planning

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:
2010 - Lay the foundation for the organization.
2011 - Execute a market penetration strategy to increase top line.
2012 - Standardization of all processes.
2013 - Develop the infrastructure to prepare for high growth.

Organization's Focus for 2012:
- Low Cost Provider
- Customer Intimacy
- Product Leadership

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.

















New Customers

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-yourselfers. 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.

Program or Product

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
Describe how program or product are service people.

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 and Team Member 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

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 and Team Member 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 and Team Member 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 and Team Member 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 %	
3.3.1.1 Create sales copy for new service packages. (Sue Smith)	01/01/12, 07/31/12	100% % complete	0 %	
3.3.2 Complete 3 online focus groups to explore pricing and value of new service packages. (Customer Service) <i>Comments on Status: Completed ahead of schedule.</i>	01/01/10, 06/30/12	3 # of online focus groups held	50 %	
3.3.2.1 Complete a competitive pricing analysis (Mikey Houglan)	02/08/09, 03/19/12	100% % Complete	80 %	
3.3.2.2 Organize participants for the first focus group (Sue Smith) <i>Comments on Status: Completed!</i>	02/08/10, 03/31/12	100% % Complete	100 %	

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 and Team Member 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) <i>Comments on Status: Sent out first blast on May 1</i>	07/31/11, 12/31/12	200 # of responses	10 %	
3.4.1.1 Compile current customer list (Sharon Foote)	05/26/11, 09/30/12	100 % complete	100 %	
3.4.1.2 Develop survey to understand customer technology needs. (Sharon Foote)	02/15/12, 02/29/12	100% % Complete	100 %	

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 and Team Member Goals	Start Date, End Date	Target, Measure	YTD	Status
4.1.1 Implement marketing campaign to draw in new markets. (Sales/Marketing) <i>Comments on Status: 4/01/10 - Initial materials completed for marketing campaign.</i>	01/01/11, 12/31/12	100% % completed	55 %	
4.1.1.1 Research and identify 6 opportunities in new markets that company could expand into. (Joanne & Tracy) (JoAnne Rogers) <i>Comments on Status: 06/01/10 - shared information with Sue to complete the marketing campaign.</i>	01/20/11, 06/30/12	100% % complete	97 %	
4.1.1.1.1 Complete a competitive analysis study of our current and prospective markets. (Tom Jones)	01/01/11, 04/30/12	100% % complete	85 %	
4.1.1.2 Develop campaign material for new markets. (Sue Smith) <i>Comments on Status: 06/01/2010 - received information from Isaiah's research.</i>	03/01/12, 10/31/13	100% % complete	0%	-100%
4.1.1.2.1 Research marketing methods best for reaching the new markets. (Sue Smith) <i>Comments on Status: Waiting on John.</i>	02/01/11, 10/31/12	100% % complete	0 %	
4.1.1.3 Create new web pages (rough draft) for the campaign promotion. (Randall Scion)	06/01/12, 05/31/13	100% % Complete	0 %	
4.1.2 Develop a competitive analysis survey for our market. (Administration) <i>Comments on Status: Waiting on Tim for report.</i>	06/01/12, 12/31/12	100% % Complete	35 %	
4.1.3 Increase sales close rate by 25% (Sales/Marketing) <i>Comments on Status: Comment</i>	01/01/12, 12/31/12	25% % increase in close rate	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 and Team Member 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 and Team Member 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 %	
5.1.2.1 Investigate necessary software/hardware (Grant Howell)	01/01/12, 06/11/12	100% % complete	100 %	
5.1.2.1.1 add goal for testing purposes (Grant Howell)		100% % complete	0 %	
5.1.2.2 Determine potential internet service providers for virtual access (Grant Howell) <i>Comments on Status: List has been compiled, but needs manager review.</i>	01/01/11, 06/11/11	3 # of providers	95 %	

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 and Team Member 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 %	
6.1.1.1 Perform quarterly update of website with focus on home page and landing pages. (John Smith)	04/02/11, 12/01/12	100% # of updates	68 %	
6.1.1.2 Manage high performance of Google AdWords (click through and conversions). (John Smith) <i>Comments on Status: CTR improved 32% since last year.</i>	01/01/11, 12/31/12	100% % Complete	5 %	
6.1.1.2.1 Manage domestic AdWords account. (John Smith)	01/01/12, 12/31/12	100% % Complete	0 %	
6.1.1.2.2 Manage international AdWords account. (John Smith)	01/01/12, 12/31/12	100 % Complete	0 %	

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 and Team Member 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 %	

6.3.2.1 Launch direct mail program with newsletters (Rebecca Currie) <i>Comments on Status: email written</i>	09/01/12, 12/31/12	6 # of newsletters	50 %	
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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 and Team Member 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 %	
7.1.2.1 Research vendors both locally and nationally. Provide a short list to Tom. (Geoff Mack)	03/01/12, 07/01/12	100% % complete	20 %	

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 and Team Member 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
8.1.1.1 Use the internet to locate strategic planning titles, reading lists, professional organizations (JoAnne Rogers)	03/12/12, 04/02/13	15 # of books located	100 %	

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 and Team Member 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 %	
9.1.1.1 Research best practices in building employee morale (Mikey Hougland)	02/01/11, 05/01/11	5 # of ideas to implement	50 %	
9.1.2 Throw a party to kick off incentive program. (Customer Service)	01/01/12, 09/30/12	100% Party held	100 %	
9.1.2.1 Determine budget for party (Sue Smith) <i>Comments on Status: Plan to finish next week.</i>	02/08/12, 12/15/12	100% Budget created and approved	0%	-100%
9.1.2.2 Solicit ideas for theme, entertainment, catering. (Sue Smith) <i>Comments on Status: Deferred</i>	02/08/12, 03/22/12	100% Compilation of ideas to make decision	0%	-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 and Team Member 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) <i>Comments on Status: Numbers calculated from accountant for first quarter.</i>	01/01/11, 02/01/12	\$5,000 \$	60 %	
11.1.1.1 Team Member Goal (or Dept Actions) (Assigned to Team Member responsible for seeing this goal completed, 6-12 months) (John Smith) <i>Comments on Status: Completed 4/18/2011</i>	01/01/14, 12/31/14	100% % Complete	100 %	
11.1.1.1.1 Team Member Action (Assigned to the Team Member responsible for seeing this action completed, short term items only (30, 60, 90 days)) (John Smith)	03/01/12, 05/31/12	100% % Complete	0 %	

PLAN IMPLEMENTATION

The following are actions we will take to implement the strategic plan on an ongoing basis:

- Appoint a strategic plan manager
- Hold people accountable (now that they are able)
- Put in place an incentive compensation plan
- Coach for achievement
- Empower managers
- Hold effective strategy meetings - first Mondays
- Hold annual retreat - second week in December