Acme Corporation Technology

Strategic Plan As of April 4, 2012

One-Click Report 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-yourselves. 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
Program or Product	Describe how program or product are service people.

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 and Team Member Goals	Measure	Target	Start Date, End Date
1.1.1 Professional Consulting: Generate $200,000 in web design consulting (Web Specialists)	$	200,000	01/01/12 12/31/12
1.1.2 Software Licenses: Generate $300,000 (IT Group)	Number of Completed Sales in Online Shopping Cart	$300,000	01/01/11 12/31/12
1.1.3 Maintenance Contracts: Generate $500,000 in maintenance contracts (Sales/Marketing)	$	$500,000	01/01/12 12/31/12

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) (12/31/12) Measure: # of new licenses Target: 1,000

Department and Team Member 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 and Team Member 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 and Team Member 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
3.3.1.1 Create sales copy for new service packages. (Sue Smith)	% complete	100%	01/01/12 07/31/12
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
3.3.2.1 Complete a competitive pricing analysis (Mikey Hougland)	% Complete	100%	02/08/09 03/19/12
3.3.2.2 Organize participants for the first focus group (Sue Smith)	% Complete	100%	02/08/10 03/31/12

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

Department and Team Member 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
3.4.1.1 Compile current customer list (Sharon Foote)	% complete	100	05/26/11 09/30/12
3.4.1.2 Develop survey to understand customer technology needs. (Sharon Foote)	% Complete	100%	02/15/12 02/29/12

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 and Team Member 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
4.1.1.1 Research and identify 6 opportunities in new markets that company could expand into. (Joanne & Tracy) (JoAnne Rogers)	% complete	100%	01/20/11 06/30/12
4.1.1.1.1 Complete a competitive analysis study of our current and prospective markets. (Tom Jones)	% complete	100%	01/01/11 04/30/12
4.1.1.2 Develop campaign material for new markets. (Sue Smith)	% complete	100%	03/01/12 10/31/13

4.1.1.2.1 Research marketing methods best for reaching the new markets. (Sue Smith)	% complete	100%	02/01/11 10/31/12
4.1.1.3 Create new web pages (rough draft) for the campaign promotion. (Randall Scion)	% Complete	100%	06/01/12 05/31/13
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 and Team Member 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 and Team Member 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
5.1.2.1 Investigate necessary software/hardware (Grant Howell)	% complete	100%	01/01/12 06/11/12
5.1.2.1.1 add goal for testing purposes (Grant Howell)	% complete	100%	
5.1.2.2 Determine potential internet service providers for virtual access (Grant Howell)	# of providers	3	01/01/11 06/11/11

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 and Team Member 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
6.1.1.1 Perform quarterly update of website with focus on home page and landing pages. (John Smith)	# of updates	100%	04/02/11 12/01/12
6.1.1.2 Manage high performance of Google AdWords (click through and conversions). (John Smith)	% Complete	100%	01/01/11 12/31/12
6.1.1.2.1 Manage domestic AdWords account. (John Smith)	% Complete	100%	01/01/12 12/31/12
6.1.1.2.2 Manage international AdWords account. (John Smith)	% Complete	100	01/01/12 12/31/12

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 custoemrs (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 and Team Member 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
6.3.2.1 Launch direct mail program with newsletters (Rebecca Currie)	# of newsletters	6	09/01/12 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 and Team Member Goals	Measure	Target	Start Date, End Date
			01/01/12

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
7.1.2.1 Research vendors both locally and nationally. Provide a short list to Tom. (Geoff Mack)	% complete	100%	03/01/12 07/01/12

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 and Team Member Goals	Measure	Target	Start Date, End Date
8.1.1 Research recommended reading list and best practices related to technology (Administration)	# of titles collected	50	10/01/12 12/31/13
8.1.1.1 Use the internet to locate strategic planning titles, reading lists, professional organizations (JoAnne Rogers)	# of books located	15	03/12/12 04/02/13

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 and Team Member Goals	Measure	Target	Start Date, End Date
9.1.1 Develop a program to encourage ideas from everyone. (Customer Service)	% complete	100%	01/01/12 09/30/12
9.1.1.1 Research best practices in building employee morale (Mikey Hougland)	# of ideas to implement	5	02/01/11 05/01/11
9.1.2 Throw a party to kick off incentive program. (Customer Service)	Party held	100%	01/01/12 09/30/12
9.1.2.1 Determine budget for party (Sue Smith)	Budget created and approved	100%	02/08/12 12/15/12
9.1.2.2 Solicit ideas for theme, entertainment, catering. (Sue Smith)	Compilation of ideas to make decision	100%	02/08/12 03/22/12

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 and Team Member Goals	Measure	Target	Start Date, End Date
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	01/01/11 02/01/12
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)	% Complete	100%	01/01/14 12/31/14
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)	% Complete	100%	03/01/12 05/31/12

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

APPENDIX A: INTERNAL AND EXTERNAL ASSESSMENT

Internal

Strengths

- Good leadership.
- Dedicated and experienced employees.
- Good communication skills.
- Extensive product knowledge and expertise.
- Long-time community presence.
- Networking and relationships in community.
- Knowledgeable of technology.

Weaknesses

- Lack of a consistent pricing strategy.
- Consistent branding/marketing messages.
- Limited physical workspace/overcrowded.
- Lack of sufficient office space.
- Inconsistent communication with potential constituents.
- Administration processes need to be written.
- Lack of organizational chart.

External

Opportunities

- Limited competition currently.
- Skilled, well-educated workforce with high local unemployment.
- Commercial office space available at historic low $$.
- Growth of the community.
- Increasing need for knowledgeable technology people.
- Increase demand for networking of computers.

Threats

- Increased local competition and expansion into market by national firms.
- Margin erosion by low cost competitors.
- High unemployment rates on decline; pool of qualified potential new hires shrinking.

APPENDIX B: 2012 - 2016 ROADMAP

Objectives & Organization-Wide Goals	Short Term Goals (2012)	Mid Term Goals (2013-2014)	Long Term Goals (2015-2016)
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	✓		
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.	✓		
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).		✓	
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**]	✓	✓	

APPENDIX C: 2012 - 2015 BUDGET

Goals and Action Items	2012	2013	2014	2015
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)	$0.00	-	-	-
1.1.1 Professional Consulting: Generate $200,000 in web design consulting	$200000.00	-	-	-
1.1.2 Software Licenses: Generate $300,000	-	-	-	-
1.1.3 Maintenance Contracts: Generate $500,000 in maintenance contracts	$0.00	-	-	-
1.2 Increase average billable hour factor. (Source: Time-tracking Program)	$0.00	-	-	-
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.	$0.00	-	-	-
2.2 Maintain profitability with a budget allocation of 25% for cash reserves.	$0.00	-	-	-
2.3 Maintain profitability with a budget allocation of 25% for profit sharing	$0.00	-	-	-
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	$0.00	-	-	-
3.1.1 Grow monthly licenses by 40% to 427	$0.00	-	-	-
3.1.2 Grow new customer trials by 25% to mark of 75 New Trials per month.	$0.00	-	-	-
3.1.3 Maintain or decrease the Churn Rate of Licenses which is currently at 8.5%.	$0.00	-	-	-
3.2 Maintenance Contracts: Acquire an average of 5 new maintenance contracts per month	$0.00	-	-	-
3.2.1 Identify and maintain list of 50 target customers that could benefit from a maintenance contract.	$0.00	-	-	-
3.3 Provide new service packages to help clients achieve more success.	$0.00	-	-	-
3.3.1 Develop web page to promote/sale new service packages.	$0.00	-	-	-
3.3.1.1 Create sales copy for new service packages.	$0.00	-	-	-
3.3.2 Complete 3 online focus groups to explore pricing and value of new service packages.	-	-	-	-
3.3.2.1 Complete a competitive pricing analysis	-	-	-	-
3.3.2.2 Organize participants for the first focus group	-	-	-	-
3.4 Develop understanding of technological issues had by existing customers.	$0.00	-	-	-
3.4.1 Research and report on the unique software requirements of existing customers.	-	-	-	-
3.4.1.1 Compile current customer list	-	-	-	-
3.4.1.2 Develop survey to understand customer technology needs.	$0.00	-	-	-
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.	$0.00	-	-	-
4.1.1 Implement marketing campaign to draw in new markets.	-	-	-	-
4.1.1.1 Research and identify 6 opportunities in new markets that company could expand into. (Joanne & Tracy)	-	-	-	-
4.1.1.2 Develop campaign material for new markets.	$0.00	-	-	-
4.1.1.3 Create new web pages (rough draft) for the campaign promotion.	$0.00	-	-	-
4.1.2 Develop a competitive analysis survey for our market.	$0.00	-	-	-
4.1.3 Increase sales close rate by 25%	$0.00	-	-	-
4.2 Professional Service: Acquire 3 new consulting clients (of $5K+) per month.	$0.00	-	-	-
4.2.1 Obtain 1 new client in the medical market monthly.	$0.00	-	-	-
4.2.2 Obtain 1 new client in the education field monthly.	$0.00	-	-	-
4.2.3 Obtain 1 new client in the nonprofit sector monthly.	$0.00	-	-	-
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.	-	-	-	-
5.1.1 Investigate international access requirements and document.	-	-	-	-

5.1.2 Purchase necessary software/hardware or make arrangements with an internet service provider for virtual access.	-	-	-	-
5.1.2.1 Investigate necessary software/hardware	$0.00	-	-	-
5.1.2.2 Determine potential internet service providers for virtual access	-	-	-	-
5.2 Define all procedures and process in writing in order to support projected growth.	$0.00	-	-	-
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).	$0.00	-	-	-
6.1.1 Web site: Update Google AdWords, home page and landing pages on a quarterly basis.	-	-	-	-
6.1.1.1 Perform quarterly update of website with focus on home page and landing pages.	-	-	-	-
6.1.1.2 Manage high performance of Google AdWords (click through and conversions).	-	-	-	-
6.2 Convert: Increase the number of leads who become customers from 20% to 25%.	$0.00	-	-	-
6.3 Blogs & Newsletters: Consistently timely relevant thought leadership that is developed, published and preserved.	$0.00	-	-	-
6.3.1 Write 1 blog post per week	$0.00	-	-	-
6.3.2 Write 2 newsletters per month.	$0.00	-	-	-
6.3.2.1 Launch direct mail program with newsletters	$0.00	-	-	-
7 Innovation/Product Development: Continue to develop technology innovation.				
7.1 Launch integration with 2 other applications	-	-	-	-
7.1.1 Map out entire integration process	$0.00	-	-	-
7.1.2 Hire a vendor to integrate applications based upon at least 3 proposals.	$0.00	-	-	-
7.1.2.1 Research vendors both locally and nationally. Provide a short list to Tom.	$0.00	-	-	-
7.2 Complete and launch the API	$0.00	-	-	-
7.3 Launch a mobile app (ipad & iphone).	-	$0.00	-	-
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	$0.00	-	-	-
8.1.1 Research recommended reading list and best practices related to technology	$0.00	-	-	-
8.1.1.1 Use the internet to locate strategic planning titles, reading lists, professional organizations	$0.00	-	-	-
8.2 Train sales people in best practices	$0.00	-	-	-
8.3 Develop better communication and presentation skills to increase ability to work with and assist clients.	$0.00	-	-	-
9 Culture: To align incentives and employee rewards with staff performance.				
9.1 Increase the number of innovative ideas through an incentive program.	$0.00	-	-	-
9.1.1 Develop a program to encourage ideas from everyone.	$0.00	-	-	-
9.1.1.1 Research best practices in building employee morale	-	-	-	-
9.1.2 Throw a party to kick off incentive program.	$0.00	-	-	-
9.1.2.1 Determine budget for party	$0.00	-	-	-
9.1.2.2 Solicit ideas for theme, entertainment, catering.	$0.00	-	-	-
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.	$0.00	-	-	-
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**]	$10000.00	-	-	-
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)	-	-	-	-
11.1.1.1 Team Member Goal (or Dept Actions) (Assigned to Team Member responsible for seeing this goal completed, 6-12 months)	-	-	$500.00	-

Totals	**$210000**	**$0**	**$500**	

APPENDIX D: SCORECARD AND EVALUATION PLAN

Organization Goals	Key Performance Indicators	Target	YTD	Variance
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
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
3.4 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
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 custoemrs (Performable)	**25%**	24.05%	-0.95%

APPENDIX E: 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?