

## Strategic Plan 2014-2016: FY16

### Administration: Action Plan - Summary

Date Revised: April 7, 2016

Priority	Items	Who	Start Date/ End Date	EOY Target, Measure	% Complete/ Actual	Status
<b>Organization Goals I Lead</b>						
High	<b>1.1 Generate sales of \$1.5 million by the end of the year.</b> <i>Comments on Status: 2/5/15- Missed sales target this month due in large part to being closed for weather</i>	Administration	01/01/14 12/31/20	\$1,500,000 \$ in sales	\$175,000	 \$-1,325,000 As of 04/07/16
Normal	<b>1.2 Maintain profitability with a budget allocation of 50% for business re-investment for product development.</b> <i>Comments on Status: 3/1/2015 staying strong. Heading in the right direction! 6/1/2015- We are on target! Great work!</i>	Administration	01/01/13 12/31/16	50% % of budget allocated for product development	37.50%	 As of 03/01/16
Normal	<b>1.3 Increase average billable hour factor.</b> <i>Comments on Status: 6/30- We improved from last month but we're still behind where we would like to be.</i>	Administration	01/01/14 12/31/16	\$300 \$ per billable hour.	\$233.50	 \$-66.50 As of 03/01/16
Normal	<b>3.1 Professional Service: Acquire 10 new consulting clients at \$10,000+ per month.</b>	Administration	01/12/13 12/31/16	10 # of new consulting clients	12,006	 11,996 As of 03/03/16
High	<b>4.1 Maintain 85% of our current customers.</b> <i>Comments on Status: Quick comment... lost contract...</i>	Administration	01/01/13 12/31/16	85% % customer retention	75%	 -10% As of 04/05/16
Normal	<b>8.1 Manage the selection, contribution and customer communication of nonprofit donations. Target is 15% of revenue.</b>	Administration	01/01/13 12/31/16	15% % of license revenue	2%	 As of 01/05/16

## My Items

Normal	1.1.3 Software Licenses: Generate \$300,000 from added software features by the end of each FY.  <i>Comments on Status: 6/16/14 - waiting on IT to fix server so we can run reports. 3/26/15-Wait for approval from Bob</i>	Administration	01/01/14, 12/31/16	\$300,000, \$ generated from added software features	\$297,000	 \$-3,000 As of 04/07/16
Normal	4.1.2 Develop a competitive analysis survey for our market.  <i>Comments on Status: 6/16/14 - goal was set up as a KPI, but that was wrong. I updated that and this goal is complete!</i>	Administration	01/01/16, 12/31/16	% Complete		 As of 12/23/15

# Administration: Action Plan - Detail

Priority	Items	Who	Start Date, End Date	EOY Target, Measure	% Complete Actual	Status
High	<b>1.1 Generate sales of \$1.5 million by the end of the year.</b> <i>Comments on Status: 2/5/15- Missed sales target this month due in large part to being closed for weather</i>	Administration	01/01/14, 12/31/20	\$1,500,000, \$ in sales	\$175,000	 \$-1,325,000 As of 04/07/16
Normal	1.1.1 Professional Consulting: Generate \$700,000 in web design consulting.	Customer Service	01/01/13, 12/31/16	\$700,000, \$ generated from web design consulting	\$50,000	 \$-650,000 As of 02/29/16
	1.1.1.1 example	Sales / Marketing VP	01/01/13, 12/31/16			 As of 03/29/16
	1.1.1.1.1 example 2.0	Crystal O'Langdon	01/01/13, 12/01/16			 As of 03/09/16
Normal	1.1.2 Maintenance Contracts: Generate \$500,000 in maintenance contracts.  <i>Comments on Status: 1/14/14 (SF) Original target was \$500K, too aggressive, adjust to \$250K</i>	Marketing	01/01/13, 12/31/16	\$500,000, \$	\$10,000	 \$-490,000 As of 01/05/16
Normal	1.1.3 Software Licenses: Generate \$300,000 from added software features by the end of each FY.  <i>Comments on Status: 6/16/14 - waiting on IT to fix server so we can run reports. 3/26/15-Wait for approval from Bob</i>	Administration	01/01/14, 12/31/16	\$300,000, \$ generated from added software features	\$297,000	 \$-3,000 As of 04/07/16
High	<b>1.1.3.1 Develop 8 software programs to monitor licenses.</b> <i>Comments on Status: 6/14/14 - We are getting closer and closer. Starting the 3rd milestone. 3/17/15-Waiting on Bob</i>	Grant Howell	01/01/14, 12/31/16	8, # of software programs	2	 -6 As of 02/09/16
	1.1.3.2 Build Collateral	Sales Director	01/01/14, 12/31/16	% complete		

							As of 01/06/16
Normal	<p><b>1.2 Maintain profitability with a budget allocation of 50% for business re-investment for product development.</b></p> <p><i>Comments on Status: 3/1/2015 staying strong. Heading in the right direction! 6/1/2015- We are on target! Great work!</i></p>	Administration	01/01/13, 12/31/16	50%, % of budget allocated for product development	37.50%		As of 03/01/16
Normal	<p><b>1.3 Increase average billable hour factor.</b></p> <p><i>Comments on Status: 6/30- We improved from last month but we're still behind where we would like to be.</i></p>	Administration	01/01/14, 12/31/16	\$300, \$ per billable hour.	\$233.50		\$-66.50 As of 03/01/16
Normal	<p><b>3.1 Professional Service: Acquire 10 new consulting clients at \$10,000+ per month.</b></p>	Administration	01/12/13, 12/31/16	10, # of new consulting clients	12,006		11,996 As of 03/03/16
	3.1.1 Develop 2 new webinars a quarter to assist Sales Team.	Marketing	01/01/15, 12/31/16	8, # of new webinars			-8 As of 01/05/16
	3.1.3 Work on new program for....	IT Group	01/12/13, 12/31/16	50%			As of 12/23/15
High	<p><b>4.1 Maintain 85% of our current customers.</b></p> <p><i>Comments on Status: Quick comment... lost contract...</i></p>	Administration	01/01/13, 12/31/16	85%, % customer retention	75%		-10% As of 04/05/16
Normal	4.1.1.1 Research and identify 6 opportunities in new markets that company could expand into.	JoAnne Rogers	01/20/13, 06/30/16	6, % complete	4		As of 03/15/16
Normal	<p>4.1.2 Develop a competitive analysis survey for our market.</p> <p><i>Comments on Status: 6/16/14 - goal was set up as a KPI, but that was wrong. I updated that and this goal is complete!</i></p>	Administration	01/01/16, 12/31/16	% Complete			As of 12/23/15
Normal	<p>4.1.3 Increase sales close rate by 25% to achieve a 43% close rate by EOY.</p> <p><i>Comments on Status: 1/15/14 Goal achieved</i></p>	Marketing	01/01/13, 12/31/16	43%, Close rate	32%		As of 01/05/16

Normal	<b>6.3 Blogs &amp; Newsletters: Consistently timely relevant thought leadership that is developed, published and preserved.</b>	Marketing	01/01/13, 12/31/16	6, # of pieces published weekly	6	 As of 01/05/16
Normal	<b>8.1 Manage the selection, contribution and customer communication of nonprofit donations. Target is 15% of revenue.</b>	Administration	01/01/13, 12/31/16	15%, % of license revenue	2%	 As of 01/05/16

 Not Started

 Deferred

 On Target

 Off Target

 Waiting on Someone

 Critical

 Achieved