Strategic Plan

Customer Service: Action Plan

Date Revised: April 4, 2012

Priority	Objectives, Goals & Action Items	Who	Start Date/ End Date	Target, Measure	% Complete/ YTD	Status/ Variance
3 Current Customers: To be viewed as the valued and effective technology resource in the western region						
Normal	**3.1 Licensing: Acquire 1,000 total licenses by the end of the year. Eor**	Sales/Marketing	01/01/12 12/31/12	1,000 # of new licenses	271	-729
Normal	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%
Normal	**3.3 Provide new service packages to help clients achieve more success.**	Web Specialists	01/01/12 12/31/12	12 # of new packages developed	10 %	🟢
Low	3.3.2 Complete 3 online focus groups to explore pricing and value of new service packages. *Comments on Status: Completed ahead of schedule.*	Customer Service	01/01/10 06/30/12	3 # of online focus groups held	50 %	🟢
Normal	3.3.2.1 Complete a competitive pricing analysis	Mikey Hougland	02/08/09 03/19/12	100% % Complete	80 %	🔴
Normal	3.3.2.2 Organize participants for the first focus group *Comments on Status: Completed!*	Sue Smith	02/08/10 03/31/12	100% % Complete	100 %	✅
High	**3.4 Develop understanding of technological issues had by existing customers.**	IT Group	01/01/12 06/30/12	100% % complete	85.50%	-14.50%
High	3.4.1 Research and report on the unique software requirements of existing customers. *Comments on Status: Sent out first blast on May 1*	Customer Service	07/31/11 12/31/12	200 # of responses	10 %	🟢
High	3.4.1.1 Compile current customer list	Sharon Foote	05/26/11 09/30/12	100 % complete	100 %	✅
Normal	3.4.1.2 Develop survey to understand customer technology needs.	Sharon Foote	02/15/12 02/29/12	100% % Complete	100 %	✅
5 Administrative Operations: Develop and maintain an infrastructure that allows for a virtual office and efficient overhead.						
Normal	**5.1 Set up computers to be accessed from any destination.** *Comments on Status: 30 more computers were added in March.*	Customer Service	01/02/11 12/31/12	5 # of computers set up each year	30 %	🟡
Normal	5.1.1 Investigate international access requirements and document. *Comments on Status: Report is almost complete, but waiting for information from Munich.*	IT Group	01/01/11 10/31/12	100% % complete	75 %	🟢
Normal	5.1.2 Purchase necessary software/hardware or make arrangements with an internet service provider for virtual access. *Comments on Status: Begun price comparisons, but have yet to hear back from the finance department.*	IT Group	01/01/11 12/31/12	100% % complete	45 %	🟡
Normal	5.1.2.1 Investigate necessary software/hardware	Grant Howell	01/01/12 06/11/12	100% % complete	100 %	✅

Normal	5.1.2.2 Determine potential internet service providers for virtual access *Comments on Status: List has been compiled, but needs manager review.*	Grant Howell	01/01/11 06/11/11	3 # of providers	95 %	🔴

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.

Normal	**8.3 Develop better communication and presentation skills to increase ability to work with and assist clients.**	Customer Service	01/01/12 12/31/12	100% % complete	0 %	🟡

9 Culture: To align incentives and employee rewards with staff performance.

Normal	**9.1 Increase the number of innovative ideas through an incentive program.**	Administration	01/01/12 09/30/12	5 # of innovative ideas implemented	63 %	🟢
Normal	9.1.1 Develop a program to encourage ideas from everyone.	Customer Service	01/01/12 09/30/12	100% % complete	100 %	✅
Normal	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 %	🔴
Normal	9.1.2 Throw a party to kick off incentive program.	Customer Service	01/01/12 09/30/12	100% Party held	100 %	✅
Normal	9.1.2.1 Determine budget for party *Comments on Status: Plan to finish next week.*	Sue Smith	02/08/12 12/15/12	100% Budget created and approved	0%	-100%
Normal	9.1.2.2 Solicit ideas for theme, entertainment, catering. *Comments on Status: Deferred*	Sue Smith	02/08/12 03/22/12	100% Compilation of ideas to make decision	0%	-100%

11 Long Term Strategic Objective (No assignment, far reaching and broad based, 3-5 years out) [Sample Goal Cascading**]**

High	**11.1 Organizational Goal (Corporate-wide, generally not assigned, 18-24 months) [**Sample Goal Cascading**]**	Administration	01/01/12 12/31/13	100% % complete	0 %	🟡
High	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) *Comments on Status: Numbers calculated from accountant for first quarter.*	Customer Service	01/01/11 02/01/12	$5,000 $	60 %	🔴
Normal	11.1.1.1 Team Member Goal (or Dept Actions) (Assigned to Team Member responsible for seeing this goal completed, 6-12 months) *Comments on Status: Completed 4/18/2011*	John Smith	01/01/14 12/31/14	100% % Complete	100 %	✅