


















Strategic Plan

Customer Service: Action Plan - Summary


Date Revised: December 3, 2013

Priority	Goals	Who	Start Date/ End Date	Target, Measure	% Complete/ YTD	Status/ Variance
Organization Goals I Lead						
High	4.2 Maintain 75% of our current customers.	Customer Service	01/01/13 02/01/13	85% % increase in customer base annually	85%	 As of 09/24/13
Normal	9.2 Develop better communication and presentation skills to increase ability to work with and assist clients.	Customer Service	01/01/13 12/31/13	100% % complete in communication/presentation skills	0%	 As of 10/28/13
My Goals						
Normal	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
Normal	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

Customer Service: Action Plan - Detail

Priority	Objectives, Goals & Action Items	Who	Start Date/ End Date	Target, Measure	% Complete/ YTD	Status/ Variance
1 Revenue Growth: Grow our revenue by 30% each year						
High	1.1 Generate sales of \$1 million by the end of the year. (Source:Quick Books)	Administration	01/01/13 12/31/13	\$1,000,000 \$ in sales	\$969,000	 \$-31,000 As of 12/03/13
Normal	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
3 Licensing: Be viewed as the valued online resource						
Normal	3.1 Licensing: Acquire 1,000 total licenses by the end of the year.	Operations	01/01/13 12/31/13	1,000 # of new licenses	580	 -420 As of 11/04/13
Normal	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
	3.1.4.1 Secure coaching on Customer Success Manager for team.	Crystal Langdon		100	30	 As of 11/18/13
4 Maintenance Contracts: To be viewed as the top technology resource in the western region.						
High	4.2 Maintain 75% of our current customers.	Customer Service	01/01/13 02/01/13	85% % increase in customer base annually	85%	 As of 09/24/13
Normal	4.2.1 Implement marketing campaign to draw in new markets. <i>Comments on Status: 10/1/13 Comment</i>	Sales/Marketing	01/01/13 12/31/13	100% % completed	60%	 As of 11/22/13
Normal	4.2.1.1 Research and identify 6 opportunities in new markets that company could expand into. (Joanne & Tracy)	JoAnne Rogers	01/20/13 06/30/13	100% % complete	100%	 As of 09/24/13
Normal	4.2.1.1.1 Complete a competitive analysis study of our current and prospective markets.	Tom Jones	01/01/11 04/30/12	100% % complete	40%	 As of 01/21/13
Normal	4.2.1.2 Develop campaign material for new markets. <i>Comments on Status: 11/18/13 Had meeting to decide course of action. Will provide next steps by 12/2/13</i>	Sales Director	03/01/12 12/31/13	100% % complete	15%	 -85% As of 11/18/13
Normal	4.2.1.3 Create new web pages (rough draft) for the campaign promotion.	Randall Scion	06/01/12 05/31/13	100% % Complete	50%	 As of 12/03/13
Normal	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
Normal	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
9 Training: Actively help our team to develop and grow professional and personally by supporting a flexible work life, providing intellectually						

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	9.2 Develop better communication and presentation skills to increase ability to work with and assist clients.	Customer Service	01/01/13 12/31/13	100% % complete in communication/presentation skills	0%	 As of 10/28/13
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