

Strategic Plan

Sales/Marketing: Action Plan

Date Revised: April 4, 2012

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	01/01/12 12/31/12	\$1,000,000 \$ in sales	\$175,000	\$-825,000
Normal	1.1.3 Maintenance Contracts: Generate \$500,000 in maintenance contracts <i>Comments on Status: Test comment</i>	Sales/Marketing	01/01/12 12/31/12	\$500,000 \$	\$132,300	\$-367,700
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	3.1.1 Grow monthly licenses by 40% to 427	IT Group	01/01/12 12/31/12	427 # Licenses	396	-31
Normal	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
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	3.2 Maintenance Contracts: Acquire an average of 5 new maintenance contracts per month	Sales/Marketing	01/01/12 12/31/12	5 # of new maintenance contracts	6	1
Normal	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 %	
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 %	
Normal	3.3.1 Develop web page to promote/sale new service packages.	Web Specialists	01/01/12 10/31/12	100% % complete	62 %	
Normal	3.3.1.1 Create sales copy for new service packages.	Sue Smith	01/01/12 07/31/12	100% % complete	0 %	
Low	3.3.2 Complete 3 online focus groups to explore pricing and value of new service packages. <i>Comments on Status: Completed ahead of schedule.</i>	Customer Service	01/01/10 06/30/12	3 # of online focus groups held	50 %	
Normal	3.3.2.2 Organize participants for the first focus group <i>Comments on Status: Completed!</i>	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.	Customer Service	07/31/11 12/31/12	200 # of responses	10 %	

	Comments on Status: Sent out first blast on May 1					
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 %	
4 New Customers: Increase new customer base by being viewed as the professional partner of choice.						
High	4.1 Reach a 15% annual increase in new customers over the next 2 years. <i>Comments on Status: 04/01/2010 - Changed the strategy 03/21/2011 - Using new advertising method</i>	Sales/Marketing	01/01/12 12/31/13	15% % increase in customer base annually	9%	
Normal	4.1.1 Implement marketing campaign to draw in new markets. <i>Comments on Status: 4/01/10 - Initial materials completed for marketing campaign.</i>	Sales/Marketing	01/01/11 12/31/12	100% % completed	55 %	
Normal	4.1.1.1 Research and identify 6 opportunities in new markets that company could expand into. (Joanne & Tracy) <i>Comments on Status: 06/01/10 - shared information with Sue to complete the marketing campaign.</i>	JoAnne Rogers	01/20/11 06/30/12	100% % complete	97 %	
Normal	4.1.1.2 Develop campaign material for new markets. <i>Comments on Status: 06/01/2010 - received information from Isaiah's research.</i>	Sue Smith	03/01/12 10/31/13	100% % complete	0%	
Normal	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 %	
Normal	4.1.2 Develop a competitive analysis survey for our market. <i>Comments on Status: Waiting on Tim for report.</i>	Administration	06/01/12 12/31/12	100% % Complete	35 %	
Normal	4.1.3 Increase sales close rate by 25% <i>Comments on Status: Comment</i>	Sales/Marketing	01/01/12 12/31/12	25% % increase in close rate	10 %	
Normal	4.2 Professional Service: Acquire 3 new consulting clients (of \$5K+) per month.	Sales/Marketing	01/12/12 12/31/12	36 # of consulting clients	12	
Normal	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	
Normal	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	
Normal	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	
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	8.2 Train sales people in best practices	Sales/Marketing	01/01/12 12/31/13	12 actual attendance per year by all 12 managers	25 %	
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	9.1.2 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 <i>Comments on Status: Plan to finish next week.</i>	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. <i>Comments on Status: Deferred</i>	Sue Smith	02/08/12 03/22/12	100% Compilation of ideas to make decision	0%	-100%