


























Strategic Plan 2014-2016 : FY15

Administration: Action Plan - Summary

Date Revised: June 5, 2015

Priority	Items	Who	Start Date/ End Date	EOY Target, Measure	% Complete/ Actual	Status/ Variance
Organization Goals I Lead						
High	1.1 KPI - Generate sales of \$1.5 million by the end of the year. <i>Comments on Status: 2/5/15- Missed sales target this month due in large part to being closed for weather 10/1/14-Looking good! 5/20/15 Comment</i>	Administration	01/01/14 12/31/17	\$1,500,000 \$ in sales	\$375,000	 \$ 1,125,000 As of 06/04/15
Normal	2.1 Maintain profitability with a budget allocation of 50% for business re-investment for product development. <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 12/31/15	50% % for product development	31.67%	 As of 06/02/15
Normal	2.2 Increase average billable hour factor. (Source: Time-tracking Program)	Administration	01/01/14 12/31/15	\$220 \$ per billable hour.	\$175	 \$ 45 As of 06/02/15
Normal	3.1 Professional Service: Acquire 2 new consulting clients \$10,000+ per month.	Administration	01/12/13 12/31/15	# of new consulting clients	0	 As of 06/02/15
High	4.3 Maintain 85% of our current customers.	Administration	01/01/13 12/31/15	85% % increase in customer base annually	80%	 -5% As of 06/02/15
Normal	6.1 Set up computers to be accessed from any destination.	Administration	01/01/15 12/31/15	100% % complete of computer accessible from any destination	15%	 As of 06/02/15
Normal	6.2 Define all procedures and process in writing in order to support projected growth.	Administration	04/01/13 12/31/15	% of process in writing.	50%	 As of 06/02/15
Normal	8.1 Manage the selection, contribution and customer communication of nonprofit donations. Target is 15% of revenue.	Administration	01/01/13 12/31/15	15% % of license revenue		 As of 06/02/15
My Items						
Normal	1.1.2 Software Licenses: Generate \$300,000 in 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	\$75,000	 \$ 225,000 As of 06/02/15
Normal	1.1.4 Increase sales conversion by 5%	Administration	01/01/14 12/31/15	25% Percent	20%	 As of 06/02/15
Normal	4.3.2 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	06/01/13 12/31/15	% Complete	100%	 As of 05/14/15

Administration: Action Plan - Detail

Priority	Items	Who	Start Date/ End Date	EOY Target, Measure	% Complete/ Actual	Status/ Variance
High	1.1 KPI - Generate sales of \$1.5 million by the end of the year. <i>Comments on Status: 2/5/15- Missed sales target this month due in large part to being closed for weather 10/1/14-Looking good! 5/20/15 Comment</i>	Administration	01/01/14 12/31/17	\$1,500,000 \$in sales	\$375,000	 \$ 1,125,000 As of 06/04/15
Normal	1.1.1 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 12/31/15	\$500,000 \$	\$60,000	 \$ 440,000 As of 06/02/15
Normal	1.1.2 Software Licenses: Generate \$300,000 in 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	\$75,000	 \$ 225,000 As of 06/02/15
	1.1.2.1 Secure 25 new license contracts weekly (Music, Children. (Top#5) <i>Comments on Status: 6/15/14 - leads are low. We need more leads to hit this number.</i>	Nate Platt	01/01/14 12/31/15	25 # of new license contracts	17.40	 As of 06/02/15
	1.1.2.1.1 Create new contract for weekly licenses.	Crystal O'Langdon	01/01/15 06/30/15	100% % complete		 As of 05/27/15
High	1.1.2.2 Develop 20 software programs to monitor licenses. <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 12/31/15	20 # of software programs	4	 -16 As of 03/17/15
Normal	1.1.4 Increase sales conversion by 5%	Administration	01/01/14 12/31/15	25% Percent	20%	 As of 06/02/15
Normal	2.1 Maintain profitability with a budget allocation of 50% for business re-investment for product development. <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 12/31/15	50% % for product development	31.67%	 As of 06/02/15
Normal	2.2 Increase average billable hour factor. (Source: Time-tracking Program)	Administration	01/01/14 12/31/15	\$220 \$per billable hour.	\$175	 \$ 45 As of 06/02/15
Normal	3.1 Professional Service: Acquire 2 new consulting clients \$10,000+ per month.	Administration	01/12/13 12/31/15	# of new consulting clients	0	 As of 06/02/15
	3.1.1 Develop 2 new webinars a quarter to assist Sales Team.	Marketing	07/01/15 12/31/15	4 # of new webinars		 -4 As of 06/02/15
High	3.1.1.1 Develop 15 minute "Basic Package" presentation. <i>Comments on Status: This is complete!</i>	Crystal O'Langdon	01/12/14 11/01/15	% Complete	30%	 As of 05/20/15
	3.1.1.3 Create a consistent slide template for Webinars. <i>Comments on Status: 3/18/15- Ahead of schedule to have slide template done. Awaiting approval from Marketing Director.</i>	Thomas Wright	07/13/15 12/31/15	100% % Complete of standard templates		 As of 05/14/15
High	3.1.2 Develop a new software program to track clients	IT Group	06/19/15 12/31/15	100% % of program completed		 As of 06/02/15

High	4.3 Maintain 85% of our current customers.	Administration	01/01/13 12/31/15	85% % increase in customer base annually	80%	 -5% As of 06/02/15
Normal	4.3.1.1 Research and identify 6 opportunities in new markets that company could expand into. (Joanne & Tracy)	JoAnne Rogers	01/20/13 06/30/15	% complete		 As of 06/02/15
Normal	4.3.2 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	06/01/13 12/31/15	% Complete	100%	 As of 05/14/15
Normal	4.3.3 Increase sales close rate by 25% <i>Comments on Status: 1/15/14 Goal achieved</i>	Marketing	01/01/13 12/31/15	% increase in close rate	55%	 As of 05/14/15
Normal	6.1 Set up computers to be accessed from any destination.	Administration	01/01/15 12/31/15	100% % complete of computer accessible from any destination	15%	 As of 06/02/15
Normal	6.2 Define all procedures and process in writing in order to support projected growth.	Administration	04/01/13 12/31/15	% of process in writing.	50%	 As of 06/02/15
Normal	8.1 Manage the selection, contribution and customer communication of nonprofit donations. Target is 15% of revenue.	Administration	01/01/13 12/31/15	15% % of license revenue		 As of 06/02/15
	8.1.1 Determine budget for Community Involvement party.	Customer Service	01/01/13 05/31/15	100% % Complete	80%	 As of 05/14/15
Normal	8.1.1.1 Solicit ideas for theme, entertainment, catering for Community Involvement party. <i>Comments on Status: 6/16/14 - a new goal for you Thomas! We need some help to move this forward.</i>	Thomas Wright	01/01/15 07/31/15	100% % Complete	15%	 As of 05/14/15

 Not Started
  Deferred
  On Target
  Off Target
  Waiting on Someone
  Critical
  Achieved