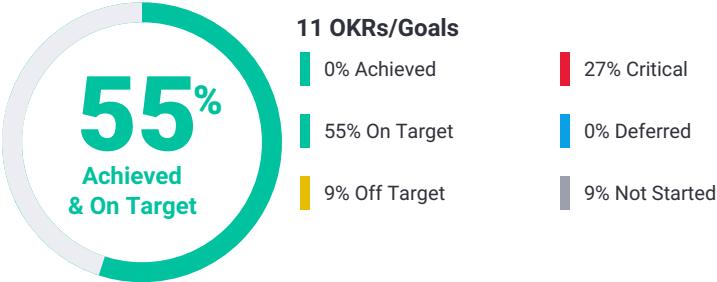# Mission

To succeed in business by providing our clients with the highest quality service and our employees with a great place to work.

Vision

We envision transforming 20,000 organizations and the lives of staff that work within them.

Performance Summary

55%
Achieved
& On Target

11 OKRs/Goals

0% Achieved	27% Critical
55% On Target	0% Deferred
9% Off Target	9% Not Started

Strategic Objectives

1: BOTTOM LINE Creating long-term financial value by growing revenue by 20% each year (moving towards a minimum 20% net margin and 10% give back contribution).

2: ACQUISITION/CONVERSION Aggressively get after conversion. OWN THE position that C-AWS is THE place for "all things Digital/IT Consulting".

3: RETENTION Crush it with our hard-earned clients.

4: SCALE Consistency, automation & playing like a team.

Key Performance Indicators

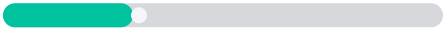| Metric	EOY Target	YTD Actual
Hi-tech Revenue	$42m	$22m
Healthcare IT Revenue	$18.5m	$4.8m
Emerging Markets Revenue	$8m	$2.6m
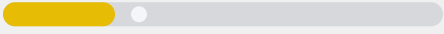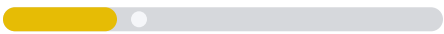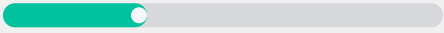
Metric	EOY Target	YTD Actual
# Average Sqls Calls Held with Net New Leads during Previous Week	45	19.81
Total # of Contracted Clients	2k	1.3k

#1: BOTTOM LINE
Creating long-term financial value by growing revenue by 20% each year (moving towards a minimum 20% net margin and 10% give back contribution).

Organization Objective **HI-TECH: Grow revenue to $42.2M in 2022 from $39.7M in 2021. #MetricMonday (1.1)** **Last comment:** 2/28/2021 - General, subjective, feeling amongst sales team is that Q1 will be short of target, as may be Q2. Customers that are placing orders are doing so by cutting 20% off restock. Many others are pushing orders to Q3 and Q4. (03/12/21)	Owner Bob Smith	Measure: *Hi-tech Revenue*	**$22m** YTD Actual	**$397k** 01/01/21	YTD Target: $14.3m	**$42m** 12/31/22

Team Key Result **ABC High-Tech 2022 Revenue: $19M (1.1.1)** **Last comment:** 2/28/2021 - Customer [ACME] pushed receiving order until March. Feb will have a dip, but March expected to hit target. (03/12/21)	Owner Bob Smith	Measure: *ABC High-tech 2022 Revenue*	**$6.2m** YTD Actual	**$0** 01/01/21	YTD Target: $6.3m	**$19m** 12/31/22
Team Key Result **DEF High Tech 2022 Revenue: $3.5M (1.1.2)**	Owner Samantha Roth (Sales)	Measure: *DEF High Tech Revenue*	**$747.8k** YTD Actual	**$0** 01/01/21	YTD Target: $1.2m	**$3.5m** 12/31/22
Team Key Result **HIJ High Tech 2022 Revenue: $11.5M (1.1.3)**	Owner James Fisher (Sales)	Measure: *HIJ High-tech 2022 Revenue*	**$3.4m** YTD Actual	**$0** 01/01/21	YTD Target: $3.8m	**$11.5m** 12/31/22
Team Key Result **KLM High-Tech 2022 Revenue: $8.2M (1.1.4)**	Owner Josh Allan (Sales)	Measure: *KLM High-tech 2022 Revenue*	**$11.3m** YTD Actual	**$0** 01/01/21	YTD Target: $2.7m	**$8.2m** 12/31/22
Team Key Result **Complete that big project we have been working on. (1.1.5)** **Last comment:** Making progress (05/12/22)	Owner Josh Allan (Sales)	Measure: *Percent Complete*	**80%** YTD Actual	**0%** 01/01/21	YTD Target: 66.4%	**100%** 12/31/22

Organization Objective **HEALTHCARE IT: Grow revenue to $18.5M in 2022 from $12.4M in 2021. #MetricMonday (1.2)**	Owner Kathleen Columbine (Sales Director)	Measure: *Healthcare IT Revenue*	**$4.8m** YTD Actual	**$0** 01/01/21	YTD Target: $6.2m	**$18.5m** 12/31/22

Team Key Result **XYZ-IT Healthcare 2022 Revenue: $11M (1.2.1)**	Owner Josh Allan (Sales)	Measure: *XYZ-IT Healthcare 2022 Revenue*	**$2.9m** YTD Actual	**$0** 01/01/21	YTD Target: $3.7m	**$11m** 12/31/22
Team Key Result **PQR-IT Healthcare 2022 Revenue: $7.5M (1.2.2)**	Owner James Fisher (Sales)	Measure: *PQR-IT Healthcare 2022 Revenue*	**$1.9m** YTD Actual	**$0** 01/01/21	YTD Target: $2.5m	**$7.5m** 12/31/22

Organization Objective **EMERGING MARKETS: Grow revenue to $8M in 2022 from $6M in 2021. #MetricMonday (1.3)**	Owner Kathleen Columbine (Sales Director)	Measure: *Emerging Markets Revenue*	**$2.6m** YTD Actual	**$0** 01/01/21	YTD Target: $2.7m	**$8m** 12/31/22

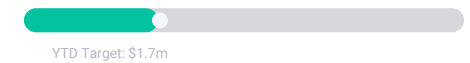| Team Key Result	Owner	Measure:	YTD Actual	01/01/21		Target
Solar: Actively work the partnership to mine opportunities. Targeting $5M 2022. (1.3.1)	Samantha Roth (Sales)	Solar Partnership Revenue	$1.5m	$0	YTD Target: $1.7m	$5m 12/31/22
Electric Cars: Actively work the partnership to mine opportunities. Targeting $3M 2022. (1.3.2)	Josh Rich (Sales)	Electric Car Partnership Revenue	$1.1m	$0	YTD Target: $1m	$3m 12/31/22

Organization Objective	Owner	Measure:	YTD Actual	01/01/22		Target
Revenue Goal of $1.1M for 2022 (1.4)	Sarah Acres (Sales)	Percent Complete	0%		YTD Target: 56.7%	100% 07/30/22

#2: ACQUISITION/CONVERSION
Aggressively get after conversion. OWN THE position that C-AWS is THE place for "all things Digital/IT Consulting".

Organization Objective	Owner	Measure:	YTD Actual	01/01/21		Target
SQL Goal: Hold >40 SQL calls w/net new leads per week (Q1 Target is 25; Q2 35, Q3 40, Q4 45). #MetricMonday (2.1)	Bob Smith	# Average Sqls Calls Held with Net...	19.81	15	YTD Target: 20.85	45 12/31/22
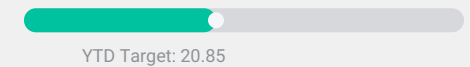
Last comment: insert smart comment here (05/11/22)

Organization Objective	Owner	Measure:	YTD Actual	01/01/21		Target
CONVERSION GOAL - ONSITE: Achieve >3 new onsite/custom service contract signed per month. #MetricMonday (2.2)	Heyden Edwards (Marketing Director)	Total # New Onsite/custom Contracts...	2.88	3	YTD Target: 3	3 12/31/22
CONVERSION GOAL - The Ultimate How To Digital Consulting Course: Achieve an average of 25 HTDC purchases per week. #MetricMonday (2.3)	Heyden Edwards (Marketing Director)	Total # HTDC Orders	21.83	20	YTD Target: 20.98	25 12/31/22
CONVERSION GOAL - Toolkit Downloads: Achieve an average of 1,500 toolkits sold per week. (up from 690 in 2021) #MetricMonday (2.4)	Heyden Edwards (Marketing Director)	Toolkits Downloaded	130	693	YTD Target: 850.36	1.5k 12/31/22

Team Key Result	Owner	Measure:	YTD Actual	01/01/21		Target
TEST (2.4.1)	Sarah Acres (Sales)	Percent Complete	0%		YTD Target: 32.7%	100% 12/31/22
Increase the number of potential toolkit buyers (those that hit the pricing page) from avg of 925 in 2021 to 1,500 in 2022. (2.4.2)	Sue King (Marketing Coordinator)	# of Visitors To Pricing Page	956	925	YTD Target: 1.1k	1.5k 12/31/22
Toolkit Addressable Audience: Achieve an average of 10000 views of the Toolkit CTAs per week. (2.4.3)	Sue King (Marketing Coordinator)	Avg. Weekly Addressable Audience On...	3.3k	8.4k	YTD Target: 9k	10k 12/31/22

#3: RETENTION
Crush it with our hard-earned clients.

Organization Objective RETENTION GOAL: BUILD an account base of 2,000 ANNUALLY CONTRACTED clients. #MetricMonday (3.1)	Owner Howard Olmstead (Finance Director)	Measure: *Total # of Contracted Clients*	**1.3k** YTD Actual	**663** 01/01/21	YTD Target: 1.2k	**2k** 12/31/22
Team Key Result KPI - # ACTIVE Contract Advisory Accounts (3.1.1)	Owner Shannon King (Customer Success)	Measure: *# of Contract Advisory Accounts*	**708** YTD Actual	**600** 01/01/21	YTD Target: 747.21	**1k** 12/31/22
Team Key Result KPI - # ACTIVE Managed Service Accounts (3.1.2)	Owner Shannon King (Customer Success)	Measure: *# Managed Service Accounts*	**595** YTD Actual	**130** 01/01/21	YTD Target: 818.19	**2k** 12/31/22
Team Key Result THANK YOU NOTES: Send for all new and renewing accounts (3.1.3)	Owner Shannon King (Customer Success)	Measure: *% Complete*	**89** YTD Actual	**0** 01/01/21	YTD Target: 98.04	**300** 12/31/22
Organization Objective HEALTH GOAL: Proactively manage the health and therefore success of our clients. (3.2)	Owner Shannon King (Customer Success)	Measure: *% of Accounts That Are Green*	**9.38%** YTD Actual	**0%** 01/01/21	YTD Target: 19.3%	**95%** 12/31/22

#4: SCALE
Consistency, automation & playing like a team.

Organization Objective Q-A Goal: Improve Quality Assurance practice to create higher trust in the company. (4.1)	Owner Bob Smith	Measure: *% Complete*	**40%** YTD Actual	**0%** 01/01/21	YTD Target: 32.7%	**100%** 12/31/22
Team Key Result Build higher confidence level in Security Review process (4.1.1) **Last comment:** insert comment here (04/05/22)	Owner Bob Smith	Measure: *Percent Complete*	**35%** YTD Actual	**0%** 01/01/21	YTD Target: 32.7%	**100%** 12/31/22
Team Key Result Align test artifacts with automated tests in order to provide wider visibility of the testing activities (4.1.2)	Owner Bob Smith	Measure: *Percent Complete*	**45%** YTD Actual	**0%** 01/01/21	YTD Target: 66.1%	**100%** 06/30/22

KPI Scorecard for 2022

C-AWS (OS sales demo plan)
As of May 17, 2022

Measure	Jan	Feb	March	April	May	June	July	Aug	Sept	Oct	Nov	Dec	EOY Target	YTD Target	YTD Status
Hi-tech Revenue (1.1)	$3m *$3.5m*	$3.1m *$3.5m*	$3.2m *$3.5m*	$3.2m *$3.5m*	$9m *$3.5m*	-	-	-	-	-	-	-	$42m	$14.3m	**$22m**

Metric										Max	Avg	Value
KLM High-tech 2022 Revenue (1.1.4)	$492k *$683.3k	$524.5k *$683.3k	$575k *$683.3k	$675k *$683.3k	$9m *$683.3k	–	–	–	–	$8.2m	$2.7m	**$11.3m**
Percent Complete (1.1.5)	–	–	–	80% *66.4%	–	–	–	–	–	100%	66.4%	**80%**
Healthcare IT Revenue (1.2)	$1.2m *$1.5m	$1.2m *$1.5m	$1.2m *$1.5m	$1.2m *$1.5m	–	–	–	–	–	$18.5m	$6.2m	**$4.8m**
XYZ-ITHealthcare 2022 Revenue (1.2.1)	$663k *$916.7k	$759.4k *$916.7k	$732.2k *$916.7k	$739.8k *$916.7k	–	–	–	–	–	$11m	$3.7m	**$2.9m**
Emerging Markets Revenue (1.3)	$663k *$666.7k	$659.1k *$666.7k	$642.9k *$666.7k	$654.5k *$666.7k	–	–	–	–	–	$8m	$2.7m	**$2.6m**
# Average Sqls Calls Held with Net New Leads during Previous Week (2.1)	01/03 - 17 / 01/10 - 11 / 01/17 - 14 / 01/24 - 17 / 01/31 - 16	02/07 - 15 / 02/14 - 16 / 02/21 - 15 / 02/28 - 20	03/14 - 25 / 03/21 - 28 / 03/28 - 23	04/11 - 25 / 04/18 - 26 / 04/25 - 24	05/02 - 25	–	–	–	–	45	20.85	**19.81**
# of Visitors To Pricing Page (2.4.2)	01/31 - 652	02/14 - 680 / 02/28 - 773	03/07 - 817 / 03/21 - 879 / 03/28 - 956	–	–	–	–	–	–	1.5k	1.1k	**956**
Total # of Contracted Clients (3.1)	01/03 - 805 / 01/10 - 805 / 01/17 - 805 / 01/24 - 805 / 01/31 - 773	02/07 - 773 / 02/14 - 865 / 02/21 - 946 / 02/28 - 962	03/07 - 988 / 03/14 - 1.1k / 03/21 - 1.1k / 03/28 - 1.3k	04/04 - 1.3k / 04/11 - 1.3k / 04/18 - 1.3k / 04/25 - 1.3k	05/02 - 1.3k	–	–	–	–	2k	1.2k	**1.3k**