Strategy: One-Page Strategic Plan (OPSP)

Organization Name: Testco

People (Reputation Drivers)

Employees
1. Appreciation every 7 days KPI = 100% a
2. Employee Net Promoter Score KPI = 60+
3. Voluntary A-Player Retention - KPI = 95%

Customers
1. Delivery - KPI = Daily report 10 minutes
2. Client 'contact'- KPI = 3 Contacts per Clie
3. NPS - KPI = Net Promoter Score at 8.5

Shareholders
1. Cash increase daily - KPI = % of increase
2. Revenue Increase - KPI = 20%
3. Gross Margin - KPI = 55%

COREVALUES/BELIEFS (Should/Shouldn't)	PURPOSE (Why)	TARGETS (3–5 YRS.) (Where)	GOALS (1 YR.) (What)
We live to hear the word "speed" We never say no! We always give options We cultivate trust with clients	EASY! - We make using data easy so that it helps rather than hurts people!	**Future Date** 31 Dec 2018 **Revenues** $14,250,000 **Profit** $2,850,000 **Mkt Cap/Cash** $1,425,000 **Sandbox** $500M+ Corporations - US, Canada, Europe	**YR Ending** 31 Dec 2015 **Revenues** $6,875,000 **Profit** $1,375,000 **MKT Cap** **Gross Margin** $3,781,250 **Cash** $687,500 **A/R Days** 32 **Inv. Days** 15 **Rev./Emp.** $225,000

Actions
To Live Values, Purposes, BHAG

1. Post Core Values and Purpose visually in the office
2. Post in ALL marketing materials and online
3. Host one on one - quarterly - CV, CP, BHAG Reviews
4.
5.

Key Thrusts/Capabilities

1. UK - Germany - France launch and profitable
2. Database developed for automated marketing
3. Zero human touch in request fullfillment
4. Named the Best Place to Work Award
5.

Key Initiatives

1. Automate proposal process
2. Dashboard/KPI metrics updated and reviewed weekly
3. Hiring/onboarding plan and process in place- filled openings
4. Ensure every TestCo team member 'understands' and 'lives' our CP/CV/BHAG
5.

Profit per X
Profit Per Installation
2014- $125,000
2015- $155,000
2016 - $200,000

Brand Promise KPI's
10 days or less - installation
NPS scoring 60+
7 business days to measurable results

Critical #: People or B/S
- 🟩 6 PhD Hires
- 🟨 5 PhD Hires
- 🟨 *Between green & red*
- 🟥 3 PhD Hires

BHAG®
'GLOBAL #1' ~ The #1 Global Data Analytics Solution. 1,000 installations within the Fortune 2,500 - globally!

Brand Promises
Speed of installation
Easy to do business with
Results in a week

Critical #: Process or P/L
- 🟩 60% Gross Margin
- 🟨 55% Gross Margin
- 🟨 *Between green & red*
- 🟥 50% Gross Margin

Strengths/Core Competencies
1. Deep analytic capabilities
2. Culture inducive to PhDs
3. Live for Speed

Weaknesses:
1. Arrogance -- we're good and we know it
2. Sales Capabilities -- lacking, so better be the best
3.

BHAG is a Registered Trademark of Jim Collins and Jerry Porras.

Process (Productivity Drivers)

Make/Buy

1. Pipeline Full - KPI = 60 qualified leads
2. Active Proposals - KPI = 14 active
3. Close Ratio - KPI = 75%+

Sell

1. Time on Project - KPI = 90% of Budget m+
2. Help Tickets - KPI = 95% SLA's met
3. Utilization Rate - KPI = 85%

Recordkeeping

1. Invoice within 24 hours
2. Cash Conversion Cycle minus 18 days
3. Timely reports -- daily, weekly

ACTIONS (QTR) (How)

Qtr # 1	ending 31 March 2015
Revenues	$2,185,000
Profit	$37,000
Mkt Cap	
Gross Margin	$1,201,750
Cash	$145,000
A/R Days	35
Inv. Days	18
Rev./Emp	$225,000

Rocks

#		Who
1	Training Program - created - implemented - every team member	Lisa
2	Complete Business Plan	John
3	Increase Google Presence	Jane
4	Reduce A/R Time - to 60 days less than 10%	Tom
5	1,200 client meetings with whole team	Angel

THEME (QTR/ANNUAL)

Deadline:	3/31/2015
Measurable Target/Critical #	

1,200 face to face meetings with decision makers, clients and partners

Theme Name

Race to 1,200

Scoreboard Design

Describe and/or sketch your design in this space

YOUR ACCOUNTABILITY (Who/When)

Your KPIs		*Goal*
1	Proposals Closed	50
2	Prospects Contacted	250
3	Face to Face Meetings	125

Your Quarterly Priorities		*Due*
1	Hire 3 Sales Associates	3/31/15
2	Increase Google Presence	3/31/15
3	1200 Client Meetings with Whole Team	3/31/15
4	Get 10 Stories from Clients on Core Values	3/31/15
5		

Critical #: People or B/S

- 🟩 22 Service Contracts
- 🟢 20 Service Contracts
- 🟨 *Between green & red*
- 🟥 18 Service Contracts

Celebration

A BIG dinner where we will bring our families - loved ones - together to celebrate the accomplishment

Critical #: People or B/S

- 🟩 1500 Client Meetings
- 🟢 1200 Client Meetings
- 🟨 *Between green & red*
- 🟥 900 Client Meetings

Critical #: Process or P/L

- 🟩 89% Utilization Rate
- 🟢 85% Utilization Rate
- 🟨 *Between green & red*
- 🟥 75% Utilization Rate

Reward

$12,000 donated to the groups top 12 favorite charities - $1,000 per charity! $10 for every contact made!

Critical #: Process or P/L

- 🟩 150 Referrals
- 🟢 100 Referrals
- 🟨 *Between green & red*
- 🟥 75 Referrals

Trends

1. Artificial intelligence and how it will evolve
2. The speed at which technology is evolving
3. Generational views on the use of our solutions
4. Communication mediums shifting -- social
5. Information flows (speed and type) changes
6. The value being placed of data as a tool

BHAG is a Registered Trademark of Jim Collins and Jerry Porras.