

Strategy: One-Page Strategic Plan (OPSP)

Organization Name:

Software Development

People (Reputation Drivers)

Employees

1. eNPS
2. Employee Turnover
3. % A-Players

Customers

1. NPS
2. Customer Retention %
3. Customer Lifetime Value

Shareholders

1. Company valuation
2. Partner profit distributions
3. Shareholder NPS

CORE VALUES/BELIEFS (Should/Shouldn't)	PURPOSE (Why)	TARGETS (3-5 YRS.) (Where)	GOALS (1 YR.) (What)																														
<p>WE ACT IN OUR CLIENTS' BEST INTEREST Every Role, Every Day.</p> <p>WE THRIVE ON DETAIL. We are obsessed with precision; everything we do must be accurate. Today's regulatory requirements require mastery of thousands of fine distinctions; investment operations have never been more complex. Our clients rely on our expertise for simplification and clarification.</p> <p>WE HAVE A BIAS FOR ACTION. We are a team of doers. When faced with uncertainty, we make our best decision and press forward. Our deadlines are real, and our actions must be timely.</p> <p>WE RELY ON INITIATIVE. Our team is comprised of independent, intelligent individuals from diverse cultures and career paths. Each employee owns the work and takes responsibility for results. We expect and reward autonomy; at every level of the organization, our people refine our culture and practice through daily action.</p> <p>WE ENSURE THE BEST IDEA WINS. The next big thing can come from anywhere. We solicit ideas constantly, internally and externally. The best way forward often emerges from debate; our culture welcomes the outspoken and the unconventional.</p>	<p>WE UNLEASH POTENTIAL</p> <p>For our clients: Our products, services and support allow our clients to focus on what they do best and reach their potential</p> <p>For our employees: We unleash the potential of our employees by helping them to focus on what they do best every day</p>	<table border="1"> <tr> <td>Year</td> <td>2018</td> </tr> <tr> <td>Revenues</td> <td>\$25m</td> </tr> <tr> <td>Net Profit</td> <td>15%</td> </tr> <tr> <td># Clients</td> <td>250</td> </tr> </table> <p>Sandbox</p> <p>Where - US and Europe What - Professional Services Management S/W How - direct sales and through law and accounting alliance</p>	Year	2018	Revenues	\$25m	Net Profit	15%	# Clients	250	<table border="1"> <tr> <td>Year</td> <td>2016</td> </tr> <tr> <td>Revenues</td> <td>\$12.5m</td> </tr> <tr> <td>Net Profit</td> <td>13%</td> </tr> <tr> <td># Clients</td> <td>75</td> </tr> <tr> <td>Gross Margin</td> <td>60%</td> </tr> <tr> <td>Net Cash Flow</td> <td>+\$75k</td> </tr> <tr> <td>A/R Days</td> <td>30</td> </tr> <tr> <td># Products</td> <td>5</td> </tr> <tr> <td>Rev./Emp.</td> <td>\$250k</td> </tr> </table>	Year	2016	Revenues	\$12.5m	Net Profit	13%	# Clients	75	Gross Margin	60%	Net Cash Flow	+\$75k	A/R Days	30	# Products	5	Rev./Emp.	\$250k				
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	<p>Profit per X</p> <p>Profit per Client: - Goal is deeper, longer term relationships with clients where we sell in more software and services</p>	<p>Brand Promise KPIs</p> <ul style="list-style-type: none"> - Time to launch - # of System Investigation Requests - Client ROI 	<p>Critical #: 1st Time Demos/Wk</p> <ul style="list-style-type: none"> 10 8 Between green and red 4 																														
	<p>BHAG®</p> <p>\$1billion ROI for our clients by 2030</p>	<p>Brand Promises</p> <ul style="list-style-type: none"> - Best implementation - faster, right the first time - Best partners - service and support - Fastest ROI 	<p>Critical #: Closing Ratio</p> <ul style="list-style-type: none"> 60% 45% Between green and red 30% 																														

Strengths/Core Competencies

1. Location - NYC office in heart of target market
2. Industry experience-most employees grew up in professional services
3. Credibility through prestigious client list

Weaknesses

1. Focus on quality makes us more expensive
2. No European presence
3. Small size relative to international competition

Your Name:

Sundar Gates

Date:

12/17/15

Process (Productivity Drivers)

Make/Buy

1. Time to Market _____
2. # Bugs per release _____
3. Items in backlog _____

Sell

1. # of First Time Demos / month _____
2. Closing Ratio _____
3. Sales Cycle Weeks _____

Record Keeping

1. Year over Year Revenue Growth _____
2. Net Profit _____
3. Cash Flow - 90-Day Runway _____

ACTIONS (How)		THEME (Qtr./Annual)	YOUR ACCOUNTABILITY (Who/When) - VP HR																																			
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Trends

- | | |
|---|------------------------------------|
| 1. Artificial intelligence driving prof. svc resource and project decisions _____ | 4. Big Data _____ |
| 2. Accelerated M&A in accounting and legal industries _____ | 5. Software as a service _____ |
| 3. Necessity for more agile software development _____ | 6. Cloud Services - i.e. AWS _____ |