

Strategy: One-Page Strategic Plan (OPSP)

Organization Name: We've Got Your Back Insurance Company

People (Reputation Drivers)

Employees

Customers

Shareholders

- | | | |
|---|---|----------------------------|
| 1. Quarterly measure of living core values _____ | 1. Retention rate _____ | 1. Company valuation _____ |
| 2. Quarterly measure of engagement w/ goals _____ | 2. Organic growth w/ existing clients _____ | 2. Projected growth _____ |
| 3. Skip level meetings w/ CEO _____ | 3. Net Promoter Score _____ | 3. _____ |

COREVALUES/BELIEFS (Should/Shouldn't)	PURPOSE (Why)	TARGETS (3-5 YRS.) (Where)	GOALS (1 YR.) (What)																													
<p>We walk in all of each other's shoes</p> <p>We are retro and radical - and embrace everything in between</p> <p>Life is short. We work hard, play hard, and make sure everyone has insurance!</p>	<p>We bring a proactive, thoughtful and true, and valued products to our clients who have long seen insurance as an albatross around their necks.</p>	<table border="1"> <tr><td>Future Date</td><td>2020</td></tr> <tr><td>Revenues</td><td>\$20 M</td></tr> <tr><td>Profit</td><td>\$10M</td></tr> <tr><td>Mkt Cap/Cash</td><td>\$2M</td></tr> </table>	Future Date	2020	Revenues	\$20 M	Profit	\$10M	Mkt Cap/Cash	\$2M	<table border="1"> <tr><td>YR Ending</td><td>2015</td></tr> <tr><td>Revenues</td><td>\$8M</td></tr> <tr><td>Profit</td><td>\$4M</td></tr> <tr><td>MKT Cap</td><td></td></tr> <tr><td>Gross Margin</td><td>50%</td></tr> <tr><td>Cash</td><td></td></tr> <tr><td>A/R Days</td><td><30</td></tr> <tr><td>Inv. Days</td><td>Organic growth</td></tr> <tr><td>Rev./Emp.</td><td>>30%</td></tr> </table>	YR Ending	2015	Revenues	\$8M	Profit	\$4M	MKT Cap		Gross Margin	50%	Cash		A/R Days	<30	Inv. Days	Organic growth	Rev./Emp.	>30%			
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<p>Profit per X Profit per client</p>	<p>Brand Promise KPI's # of client refunds</p>	<p>Critical #: People or B/S</p> <ul style="list-style-type: none"> ■ 4 critical succession plans ■ 2 critical succession plans ■ <i>Between green & red</i> 1 plan ■ No succession planning 																														
<p>BHAG® Invest \$2M per year back into California-based community programs</p>	<p>Brand Promises 100% value guaranteed (or 100% of premium refunded)</p>	<p>Critical #: Process or P/L</p> <ul style="list-style-type: none"> ■ Achieve <30 AR cycle ■ <45 day AR cycle ■ <i>Between green & red</i> <60 days ■ <90 day AR cycle 																														

Strengths/Core Competencies

- Leaders in the non-profit insurance industry _____
- 80 years of experience _____
- Blend of experience in our team of employees _____

Weaknesses:

- Technically limited _____
- New player in two of our critical markets _____
- Several key employees close to retirement _____

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Process (Productivity Drivers)

Make/Buy

Sell

Recordkeeping

1. Process time - claims to settlement
2. Appropriate coverage for loss prediction
3. Customer satisfaction through NPS

1. Sales process - meet to sign
2. Revenue growth
3. Close ratios

1. Pre-renewals
2. Certificate accuracy
3. _____

ACTIONS (QTR) (How)		THEME (QTR/ANNUAL)	YOUR ACCOUNTABILITY (Who/When)	
Qtr #	Q1 2015	Deadline: 6/30/15	Your KPIs Goal	
Revenues	\$2M	Measurable Target/Critical #	1	Employee turnover 80%
Profit	\$750k	Revenue \$4M Client NPS 98%	2	Organic growth in sales <10%
Mkt Cap		Theme Name	3	Employee feedback on core values 95%
Gross Margin		Watch Us Grow! (like the new museum being built next door)	Your Quarterly Priorities Due	
Cash		Scoreboard Design	1	Sponsor, implement and measure quarterly employee events 3/31
A/R Days	New talent pipeline >5	Describe and/or sketch your design in this space	2	Develop & implement monthly skip level meetings. Measure change 1/31
Inv. Days	Organic growth <30%	The new museum is being built next door. We have a museum made of Legos going up with defined revenue markers. The inside is being built based on client NPS markers.	3	Complete annual reviews with comp plans for 2015 implemented 2/28
Rev./Emp			4	Implement individual goals for all associates, tied to annual rocks 3/31
Rocks			5	Identify 8 solid long term producers 3/31
	<i>Who</i>			
1	Identify 8 solid long term producers in Real Estate and Healthcare benefits			
2	Implement sales system training for all producers - measure increased usage			
3	Implement NPS process with clients with renewals			
4	Select small accounts partner			
5	Product cross training for organic growth with producers			

<p>Critical #: People or B/S</p> <ul style="list-style-type: none"> ■ New producer plan & pipeline of 8 candidates ■ 6 new prospects ■ <i>Between green & red</i> 4 new prospects ■ 3 new prospects 	<p>Celebration</p> <p>We will all go to the gala opening of the museum in June if we hit our numbers</p>	<p>Critical #: People or B/S</p> <ul style="list-style-type: none"> ■ Identify & connect solid 8 new producer prospects ■ 6 new prospects ■ <i>Between green & red</i> 4 new prospects ■ 3 new prospects
<p>Critical #: Process or P/L</p> <ul style="list-style-type: none"> ■ Organic growth >10% ■ Organic growth <10% ■ <i>Between green & red</i> <8% ■ <6% 	<p>Reward</p>	<p>Critical #: Process or P/L</p> <ul style="list-style-type: none"> ■ All employees have 2015 goals in place ■ 90% of employees have 2015 goals in place ■ <i>Between green & red</i> 75% ■ 50%

Trends

1. Mobile access
2. Cross selling with HNW individuals to their Co's
3. Connecting non-profits with tech

4. Organic growth - broader offerings
5. _____
6. _____

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