**LONG-TERM VISION**

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| **FOCUS** | | **CORE VALUES** |
| **Mission** | Providing the Resources to Help Small-Medium Sized Businesses Realize Their Dreams | * Integrity * Growth * Team Players * Independent Thinking * Exemplary Customer Service * Winning * Innovation * Collaboration * Discipline to Process * Diligence   . |
| **Target Market** | Owner-Managed businesses in the D/FW metro area with Revenue $5-$100 million |
| **Universal Selling Proposition** | You will receive exemplary customer service and business resources at a better value than you can receive anywhere else |

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| **10 YEAR BHAG** | **3 YEAR VISION** |
| * NPS Score of 70 or greater * Employee Engagement Score of 80% or greater * Net Income of $5 million * Revenue of $25 million * ROE of 15% or greater * EPS of $5.00 or greater * EPS Compound Annual Growth Rate of 10% or greater | * NPS Score of 60 or greater * Employee Engagement Score of 70% or greater * Net Income of $2 million * Revenue of $10 million * ROE of 15% or greater * EPS of $2.00 or greater * EPS Compound Annual Growth Rate of 15% or greater |

**CURRENT FOCUS**

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| **STRENGTHS** | **WEAKNESSES** |
| * Access to Capital * Business Development * Experienced and Engaged Management Team & Employees * Healthy Company Culture * Highly Satisfied Customer Base | * Technology * Expense Management Culture * Management Depth * Lack of Written Processes * Product offering is Middle of the Pack |

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| **OPPORTUNITIES** | **THREATS** |
| * Leverage customer referrals * Leverage employee referrals * Systematize business development process * Increase number of sales staff | * Staying competitive to meet customer preferences for digital experiences * Economic downturn * Employee turnover |

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| **1 YEAR GOALS** | **STRATEGIC INITIATIVES** |
| * NPS of 60 or greater * Employee Engagement Score of 65% or better * Net Income of $1.5 million * Revenue of $8 million * ROE of 15% or greater * EPS of $1.50 or greater (15% year over year growth) | * Create Customer Referral Program (Champion: Smith, Manager: Jones) * Create Systematic Business Development Process (Champion: Smith, Manager: Williams) * Build Digital Product Capability (Champion: Reeves, Manager: Jackson) * Document Processes & Create Staffing Models (Champion: Sparks, Manager: Levin) |