



Managing & Reporting on the ECAC 2018-2021 Strategic Plan

Presented by OnStrategy

ECAC'S EXPECTED OUTCOMES

1. Establish the framework for governance, management and reporting of the State of Nevada Early Childhood Strategic Plan for all stakeholders, providers and legislators;
2. Stand up a sustainable, simple reporting process for committees to report on progress;
3. Report on quantitative outcomes and qualitative progress that pulls data from both existing data sources; (automated) and self-reported data (simplified)
4. Consistently report on progress formally to the LCB and real-time via the ECAC website.



WHAT WE DO

We aren't just software developers. We're a team of strategists with years of real-world of experience building & executing strategy. Our core capabilities include:



Market Research

Ph.D.-directed methodology to gain insight into market, industry, and customer opportunities.



Retreat Facilitation

Certified facilitators skilled at creating consensus about the future.



Corporate Strategy Design

Strategists leverage market research to build growth plans that are executable and create organizational focus.



Implementation Management

Setting up practices, processes and systems to manage strategy and corporate performance.



OUR FOCUS AND IMPACT

SECTOR FOCUS

Business < \$500M

Local & State Governments

Non-Profits

Educational Institutions

Healthcare



1,046

Strategies we've built and managed



1,311

Goals achieved last month



11,198

Goals and actions tracked last month



39,251

YouTube subscribers



NON-PROFIT ORGANIZATIONS WE'VE HELPED

- Make-A-Wish. Phoenix, AZ
- Boy Scouts of America. Irving, TX
- Boys and Girls Club Truckee Meadows. Reno, NV
- Northern Nevada Children's Cancer Foundation. Reno, NV
- Nevada Industry Excellence. Reno, NV
- National CASA. Seattle, WA
- C.S. Lewis Foundation. Redlands, CA
- Potter's House. Guatemala City, GU
- Prison Fellowship Ministries. Lansdowne, VA
- Susan G. Komen Foundation. Reno, NV
- Nevada Discovery Museum. Reno, NV
- St. Simon's Land Trust. St. Simons Island, GA
- Big Brothers Big Sisters Northern Nevada. Reno, NV
- Ronald McDonald House Charities of Northern Nevada. Reno, NV
- Ronald McDonald House Charities of Northern Alberta. Alberta, Canada
- Educational Media Foundation. Rocklin, CA
- Nevada Urban Indians. Reno, NV
- Native America Water Association. Minden, NV
- Tahoe Resource Conservation District. South Lake Tahoe, CA
- No To Abuse. Pahrump, NV
- Angel Kiss Foundation. Reno, NV



GOVERNMENT ENTITIES WE'VE HELPED

- Government of Washoe County – Board of County Commissioners and Various Departments. Reno, NV
- Nevada Juvenile Justice Oversight Commission
- Clark County Department of Family Services. Las Vegas, NV
- Economic Development Authority of Western Nevada (EDAWN). Reno, NV
- Nevada Governor's Office of Economic Development
- Douglas County. Minden, NV
- Reno Sparks Convention and Visitors Authority. Reno, NV
- Reno-Tahoe Airport Authority. Reno, NV
- Nevada Department of Agriculture. Reno, NV
- Nevada Department of Wildlife. Reno, NV
- Nevada Commission on Tourism. Reno, NV
- Nevada Sheriff's and Chief's Association. Las Vegas, NV
- City of Reno. Reno, NV
- City of Sparks. Sparks, NV
- Reno Justice Court. Reno, NV
- City and County of San Francisco. CA
- Charlotte-Mecklenburg Police Department
- Visalia Police Department. Visalia, CA
- Richland County Recreation Commission. Columbia, SC
- US Army Electronic Proving Ground. Arizona
- Naval Consolidated Brig Chesapeake. Chesapeake, VA
- Office of Management and Budget – State of North Dakota. Bismarck, ND
- City of Fernley. Fernley, NV
- Arthur Carhart National Wilderness Training Center. Missoula, MT
- Dona Ana County. Las Cruces, NM
- Det'on Cho Corporation. Yellowknife, NWT Canada
- City of Las Cruces. Las Cruces, NM
- Seminole Tribe of Florida. Hollywood, FL
- Sovereign Nation of the Chitimacha Tribe of Louisiana. Charenton, LA



HOW WE WORK TOGETHER



SERVICES

We meet you wherever you are to build your strategic plan.



SOFTWARE

Unlimited user software to engage your team in execution.

Remote Advisory Services

A fast, affordable approach to building your strategic plan through remote coaching and advising.

OR

Onsite Consulting Services

Let us facilitate your planning sessions onsite and design your strategic plan.

The OnStrategy Platform

Build your strategy, align your team, and cultivate shared accountability.

Visual Performance Dashboard

Monitor your core performance indicators and their supporting actions.

Mobile

Quickly manage the performance of your goals and actions.

API

Bridge data between HRIS, CRM, ERP and financial management systems.



SIMPLICITY

Simple is harder to achieve than complex.



PURPOSE

If it doesn't advance the strategy, it isn't pursued.



STRUCTURE

It doesn't stifle creativity, it allows it to thrive.



ENGAGEMENT

Your employees' perspective of success is only half the picture. The perspective of customers completes it.



ALIGNMENT

Be on the same page. Speak the same language. Move in the same direction.



OWNERSHIP & ACCOUNTABILITY

Accept responsibility and be accountable for your actions.



AGILITY

Think. Respond. Adjust.



OUR SENIOR STRATEGY EXPERTS



Howard Olsen, Ph.D.
Co-Founder, President



Erica Olsen
Co-Founder/COO



Jeff Brunings
Senior Strategist



Kim Perkins
Senior Strategist



Kathleen Colombo
Director, Client Engagement
Senior Strategist



Lorna Shepard
Senior Strategist



ECAC'S OUTCOMES



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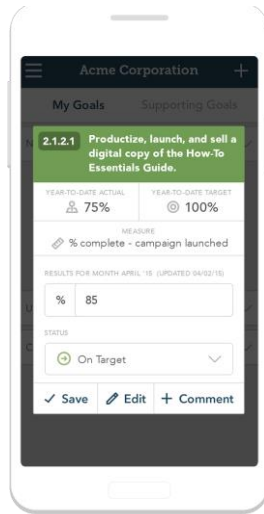


#1 ESTABLISH THE FRAMEWORK

IMPLEMENTATION-READY PLAN	COMMITTEE TRAINING	COMMITTEE REPORTING	STAKEHOLDER COMMUNICATION
• Rapidly make refinements to get your plan implementation-ready. • Determine data sources for benchmarks • Upload your plan and optimize it for reporting.	• Set up cadence and standard strategy review meeting structure. • Train 3 committees. • Set up communications and reporting structure.	• Begin reporting on performance, both qualitative & quantitative. • Review progress during committee meetings.	• Publish the bi-monthly report and integrate standard real-time dashboard into site. • Build a culture of transparency by easily sharing performance data.
SESSION & SCHEDULE			
Sessions/Calls Strategy Leader/Process Owner	Three 60-min Committee Trainings	Committee Meetings; Setup with the IT & Data sources	Reporting refinement with Strategic Leader as needed

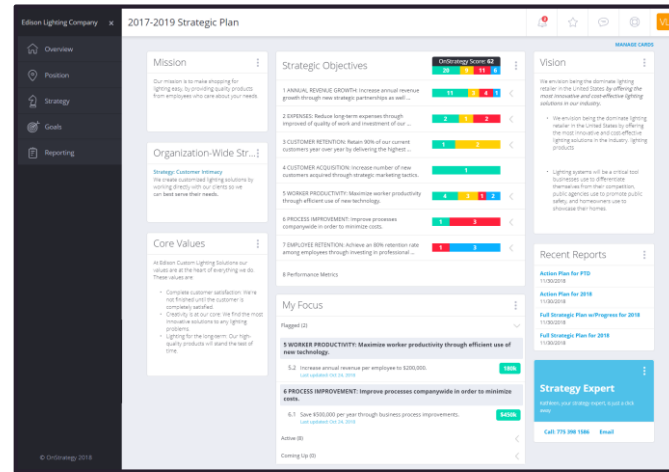


#2 SIMPLE REPORTING PROCESS



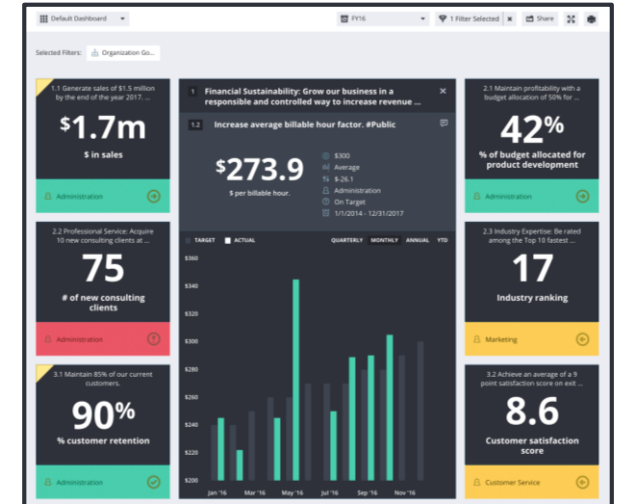
Mobile Application

Quick, simple status updates and revisions on the fly (view of your items only).



Platform

Build and revise your plan, print reports, view the full plan (including items not assigned to you).



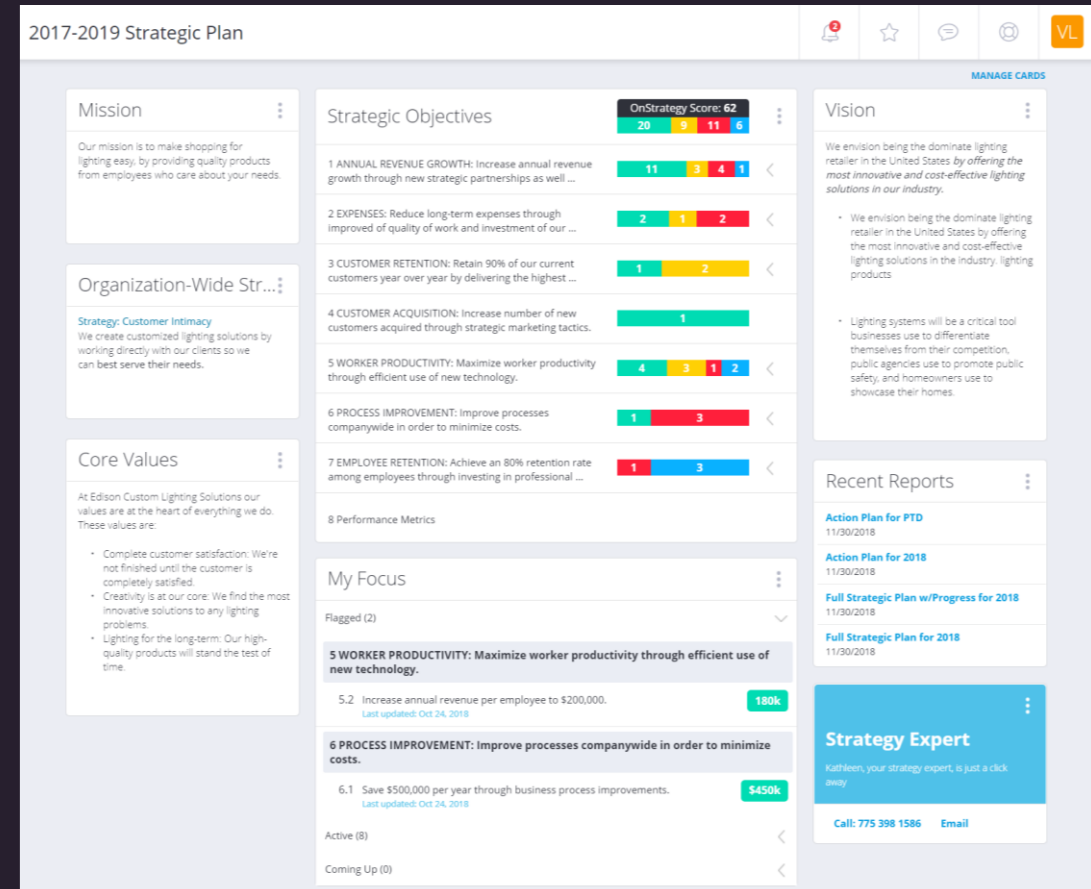
Dashboard

Live, dynamic view of progress to plan and KPI metrics; use to run monthly strategy review meetings.

#2 SIMPLE REPORTING PROCESS

The **OnStrategy Platform** will help you build your strategy, align your team, and cultivate shared accountability to help achieve your organization's vision.

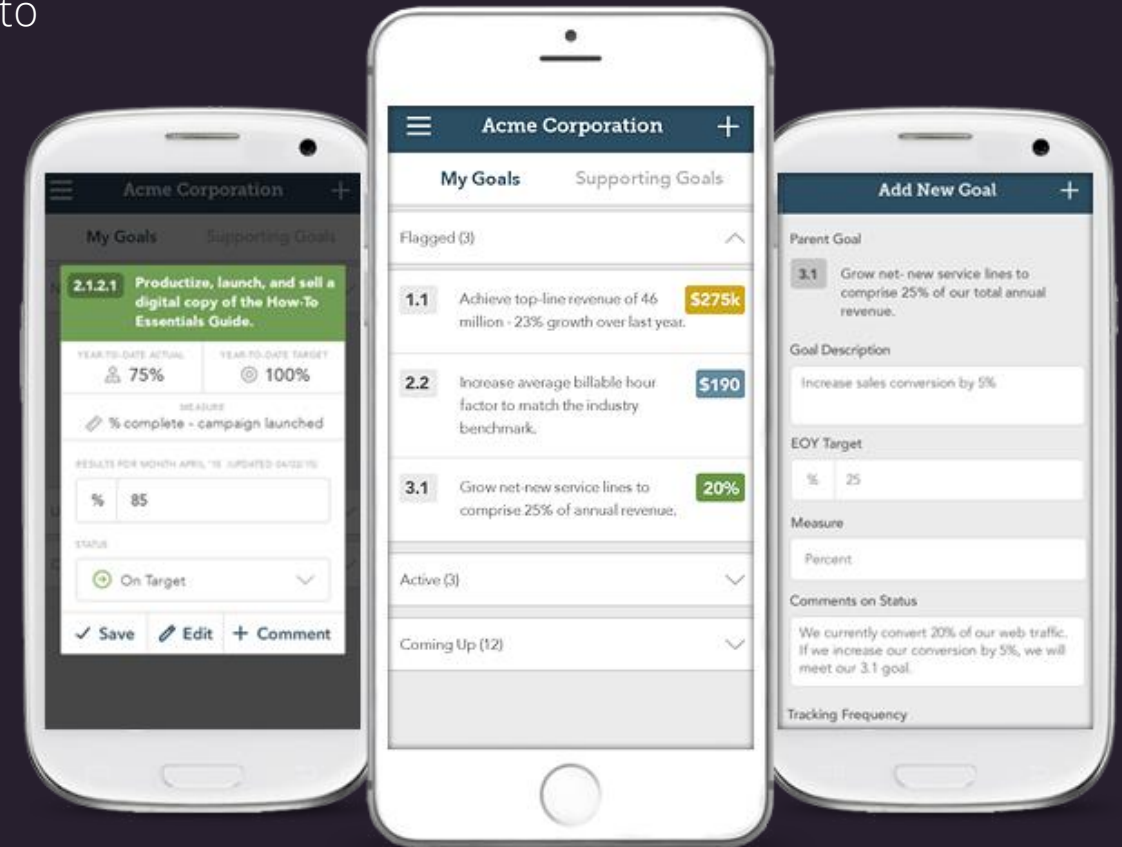
- ✓ **Simplified goal cascading** so you can create shared accountability and multiple plans aligned to your corporate strategy.
- ✓ **Enable your entire team to be part of strategy execution** with customized, individualized plan views and quick updating features.
- ✓ **KPI scorecard** to show how individual contributions support execution.
- ✓ **Real-time collaboration** to build your strategy and manage execution with your team.



#2 SIMPLE REPORTING PROCESS

OnStrategy's mobile application makes it easy for your team to quickly manage their performance. It's easier than ever before to have everyone connected to the strategic direction and their individual actions supporting it.

- ✓ **Stay focused on what matters most** by seeing top priorities with a single glance.
- ✓ **Manage performance in 30 seconds** with simple, streamlined progress reporting.
- ✓ **Stay agile** - add, edit, and modify goals as needed.
- ✓ **Know exactly where you are** and how you're executing against your strategy by quickly viewing performance.



#3 QUALITATIVE & QUANTITATIVE DATA

Automate your data management using OnStrategy's available API connectivity. Use one of 750+ pre-built extensions using Zapier or custom code the connectivity you need. Pre-built extensions:

- Google Sheets
- Gmail
- Google Analytics
- Google Calendar
- Google Drive
- Mail Chimp
- Slack
- Trello
- Salesforce
- Survey Monkey
- Hubspot
- Jira
- Quickbooks Online
- Constant Contact
- Basecamp
- ASANA



750+ Prebuilt
Integrations



Google Drive



Google Sheets



Gmail



MailChimp



slack



#4 REAL-TIME PERFORMANCE REPORTS

Clearly and effectively communicate your strategic direction and expectations with corporate and department plan reports. These meeting-ready reports include:

Corporate Plan Reports

- Full Strategic Plan
- Executive Summary
- One-Page Plan
- Road Map
- Linear Cascade
- SWOT
- One-Click
- Budget

Performance Reports

- Full Strategic Plan w/Progress
- Executive Summary w/Progress
- Scorecard
- Strategy Review PPT
- Dept. Action Plans
- Individual Action Plans
- Individual Scorecards
- Individual Performance Review

ACME CORPORATION: STRATEGIC PLAN 2014-2017

AS OF JULY 2017

Mission

Why do we exist?

Our core purpose is to create technology solutions for forward thinking organizations to empower their success and to magnify their impact.

Core Values

How will we behave?

- Purpose & Growth - our foundation is built on our purpose and provides a place for our team's passion.
- Client Focus - a razor-sharp focus on our customer's growth is essential and the only way to succeed.
- Integrity - to have honesty and respect for all.
- Leadership - to empower and inspire entrepreneurial leaders.
- Professionalism - to be professional in our actions to our clients, partners and each other.

Competitive Advantages

What do we do best?

- Recurring revenue that is scalable
- Assets and software products in place outside our services
- Innovative in manying business process with technology
- Business Network - domestic and international
- Patented Intellectual Property - interactive, integrated web-based

Organization Wide Strategies

How will we succeed?

Organization-Wide Focus:
 2013 - Lay the foundation for the organization.
 2014 - Execute a market penetration strategy to increase top line.
 2015 - Standardization of all processes.
 2016 - Develop the infrastructure to prepare for growth.

Strategic Objectives and Organization Goals (What's important now?)

Financial

1 Financial Sustainability: Grow our business in a responsible and controlled way to increase revenue by 30% year-over-year for the next 3 years while maintaining a 20% net profit margin each year.

- 1.1 Generate sales of \$1.5 million by the end of the year 2017. #Public
- 1.2 Launch and implement digital marketing strategy.

Customer

2 Professional Services: To be the professional partner of choice.

- 2.1 Maintain profitability with a budget allocation of 50% for business re-investment for product development.
- 2.2 Professional Service: Acquire 10 new consulting clients at \$10,000+ per month.
- 2.3 Industry Expertise: Be rated among the Top 10 fastest growing tech companies in 2016.

3 Maintenance Contracts: To be viewed as the top technology resource in the western region.

- 3.1 Maintain 85% of our current customers.
- 3.2 Achieve an average of a 9 point satisfaction score on exit surveys.
- 3.3 Licensing: Acquire 3,000 total licenses by the end of the year.
- 3.4 Maintenance Contracts: Acquire an average of 7 new maintenance contracts per month

Internal/Operational

4 Innovation/Product Development: Continue to develop technology innovation.

- 4.1 Launch integration with 4 other applications.

5 Overall Operations: Develop and maintain an infrastructure that allows for a virtual office and efficient overhead.

- 5.1 Set up computers to be accessed from any destination.
- 5.2 Define all procedures and process in writing in order to support projected growth.
- 5.3 Blogs & Newsletters: Consistently timely relevant thought leadership that is developed, published and preserved.

People and Learning

6 Training: Actively help our team to develop and grow professional and personally by supporting a flexible work life, providing intellectually engaging work, and fair compensation.

- 6.1 Train sales people in best practices
- 6.2 Develop better communication and presentation skills to increase ability to work with and assist clients.

7 Community Involvement: Develop and implement a corporate giving strategy that is in line with our competitive advantages.

- 7.1 Manage the selection, contribution and customer communication of nonprofit donations. Target is 15% of revenue.

8 Long Term Strategic Objective (No assignment, far reaching and broad based, 3-5 years out) [Sample Goal Cascading**]**

8.1 Organizational Goal (Corporate-wide, generally not assigned, 18-24 months) [**Sample Goal Cascading**]

KPI

How will we measure success?

Measure	Target
\$ in sales	\$2,535,000
% complete	100%
# of new consulting clients	120
% customer retention	85%
avg monthly # of new maintenance contracts	7

Vision

What does success look like?

We envision being THE technology experts and resource center for small and medium-sized organizations. Be THE professional partner of choice.

- Be viewed as the top technology resource in the western region.
- Develop technology innovation.
- Build an infrastructure that supports a virtual office and efficient overhead.

Implementation

How do we make strategy a habit?

Appoint a strategic plan manager
 Hold people accountable (now that they are able)
 Put in place an incentive compensation plan
 Coach for achievement
 Empower managers
 Hold effective strategy meetings - first Mondays
 Hold annual retreat - second week in December



#4 REAL-TIME PERFORMANCE REPORTS

The Visual Performance Dashboard is unlike other dashboards. It's more than static metrics. It's real-time monitoring of core performance indicators connected to the supporting actions across the organization impacting results.

- ✓ **Make your data meaningful** with visual displays to provide insight into the core performance indicators driving your success.
- ✓ **View performance with monthly, quarterly, or annual views** so you can make data-driven decisions.
- ✓ **Build a culture of transparency** by easily sharing performance with an external facing dashboard, PDF report, or an embedded link.
- ✓ **Filter and sort** by organizational function, status and priority.



COST PROPOSAL

Strategic Plan Management & Reporting		Cost
☐ OnStrategy Software Subscription – 24 months		\$15,600
☐ Training & Support Services – w/in first 90 days		\$1,400
Total Estimated Budget		\$17,000

OPTIONAL: Custom Consulting Services		Cost
☐ Subcommittee Staffing – Manage the Implementation & Reporting Process for 3 bi-monthly subcommittee meetings for 6 months (total of 9 meetings)		\$7,500
☐ 1 Customer Performance Report (one time)		\$2,500
☐ Build the API connection for quantitative data		\$3,000 - \$4,000
☐ Real-time, custom dashboard integrated in ECAC website		TBD
Total Estimated Budget		~\$13,000 - \$14,000



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