

Kanopi <> Vision/Traction Organizer

VISION

<p>CORE VALUES</p>	<p>We value human connection. We are #BetterTogether. We value being #Nimble and helpful. We value #Clarity. We value that when something is complex, we #OwnIt. We value contributing #Trust daily. We value contributing to our #Community. We value expressing #Gratitude.</p>	<p>3 - YEAR PICTURE</p>
<p>CORE FOCUS</p>	<p>Purpose: We create impactful futures for our people, clients, and communities. Our Niche: We take care of the full lifecycle of a website.</p>	<p>Future Date: December 31, 2022 Revenue: Total Revenue: \$8.5 million ARR: \$5.1 million (60%) Profit: Using the profit-first model: 13%. Measurables Monthly Invoicing: \$700,000</p>
<p>10-YEAR TARGET</p>	<p>Kanopi is running as a sustainable agency (80% of revenue is MRR, 16% profit margin), with engaged, happy employees (95% YOY employee retention) that create impact for our long term clients (95% YOY client retention) who are invested in taking care of the whole lifecycle of their website (brand recognition of CWI).</p>	<p>What does this look like: Kanopi is running as a sustainable agency</p>
<p>MARKETING STRATEGY</p>	<p>Target market: Marketing/Communications Directors and Managers in our target verticals with an annual minimum of \$36,000 to commit to website improvements. A small internal team of no more than 4-6 people. The minimum company operating income of \$10MM, and employee count between 50-500. Personas are Premium Patti, Support Stacy, and Traditional Tara.</p> <p>Three Uniques</p> <ol style="list-style-type: none"> We'll meet you where you are - We help clients at whatever their stage, from initial build through long-term support. Our support is the best - Our goal is to create real impact for clients on an ongoing basis, with excellent customer service. Our humans/values make it work - Our humans are friendly, experienced, helpful, and invested in your success. <p>Proven Process: Continuous Website Improvement (CWI). We <i>strategize</i> (website growth plan), <i>implement</i> (design/build/support), <i>learn</i> (leverage data for user-centric input) and <i>iterate</i> (continuously improve your website!)</p> <p>Guarantee: Customer service is number one. We promise to deliver tangible, measurable value within 45 days of our engagement.</p>	<p>- See the quarterly profit increase of 1% per quarter - Employees hit or exceed billable targets - Increase the split of support versus new build to 75/25 - Have chosen to focus on profitable clients/project - Increased ability to take the cake on projects</p> <p>Engaged, happy employees</p> <ul style="list-style-type: none"> - An internal growth plan for nurturing internal talent and offering promotions from within - Mid-tier developer onboarding program operationalized - Profit-sharing operationalized <p>Create impact for our long term clients</p> <ul style="list-style-type: none"> - Two 5-star clutch reviews per month - One client video testimonial per quarter - Two client success sessions per month <p>Invested in taking care of the whole lifecycle of the website</p> <ul style="list-style-type: none"> - Award for our innovative approach to website support - In the top 5 web development companies on Clutch.io - Maintain first-page ranking on Drupal.org

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TRACTION

1-YEAR PLAN	ROCKS	ISSUES LIST																																																																										
<p>Future Date: December 31, 2020</p> <p>Revenue: Total revenue: \$6 million ARR: \$2.5 million (42% MRR)</p> <p>Profit: Using the profit-first model: 5%</p> <p>Measurables: Monthly Invoicing: \$500,000</p> <p>What does this look like? Kanopi is running as a sustainable agency</p> <ul style="list-style-type: none"> - See the quarterly profit increase of 1% per quarter - Employees hit or exceed billable targets - Pods fully operationalized with resourcing tied to real tickets - Increase the split of support versus new build to 65/35 - All rates are \$165/\$150 an hour, or higher - Company & department level scorecards - Have measurable, clear visibility into per client/project profitability - Fully operationalize EOS <p>Engaged, happy employees</p> <ul style="list-style-type: none"> - Increase in benefit offerings - Skillfully match talent acquisition to sales growth - Core processes are documented in the Intranet - Operationalize bi-annual Kanopian success sessions - Make our bi-annual retreat happen! <p>Create impact for our long term clients</p> <ul style="list-style-type: none"> - Two 5-star clutch reviews per month - One client video testimonial per quarter - Two client success sessions per month <p>Invested in taking care of the whole lifecycle of the website</p> <ul style="list-style-type: none"> - Build content authority voice around continuous website improvement - Continuously improve our brand position by validating with current clients - Be in the top 25 web development companies on Clutch.io - Obtain first-page ranking on Drupal.org 	<p>Future Date: March 31, 2020</p> <p>Revenue: Q1 revenue: \$1.5 million Q1 MRR: 625K</p> <p>Profit: Using the profit-first model: 3%</p> <p>Measurables: Monthly Invoicing: \$500,000</p> <p>Rocks for the Quarter</p> <table border="1"> <thead> <tr> <th></th> <th></th> <th>Who</th> </tr> </thead> <tbody> <tr><td>1</td><td>Skillful Dissemination of V/TO & Acc Chart</td><td>Anne</td></tr> <tr><td>2</td><td>Raise Rates for 60% of the outstanding clients</td><td>Denise</td></tr> <tr><td>3</td><td>Standardizing Teamwork</td><td>Denise</td></tr> <tr><td>4</td><td>Company Scorecard</td><td>Kat</td></tr> <tr><td>5</td><td>Digital Financial Modeling</td><td>Jill</td></tr> <tr><td>6</td><td>Job Descriptions/Accountability Points</td><td>Erin</td></tr> <tr><td>7</td><td>Base Build Configuration</td><td>Kat</td></tr> <tr><td>8</td><td>Document/Share Standardized Plan for QA</td><td>Kat</td></tr> <tr><td>9</td><td>Client Engagement Scorecard</td><td>Anne</td></tr> <tr><td>10</td><td>Bi-annual Success Sessions with mgmt</td><td>Erin</td></tr> <tr><td>11</td><td>Operationalize Pod Structure</td><td>Jess</td></tr> <tr><td>12</td><td>Incorporating CWI into Website</td><td>Allison</td></tr> <tr><td>13</td><td>Content Strategy: Pillars, Plan, Execution</td><td>Allison</td></tr> <tr><td>14</td><td>Intranet: Client Engagement Processes</td><td>Allison</td></tr> <tr><td>15</td><td>Drip Accounts</td><td>Jill</td></tr> <tr><td>16</td><td>Intranet: Delivery & Core Processes</td><td>Tim</td></tr> <tr><td>17</td><td>Data Reporting for Tech Department</td><td>Matt</td></tr> </tbody> </table>			Who	1	Skillful Dissemination of V/TO & Acc Chart	Anne	2	Raise Rates for 60% of the outstanding clients	Denise	3	Standardizing Teamwork	Denise	4	Company Scorecard	Kat	5	Digital Financial Modeling	Jill	6	Job Descriptions/Accountability Points	Erin	7	Base Build Configuration	Kat	8	Document/Share Standardized Plan for QA	Kat	9	Client Engagement Scorecard	Anne	10	Bi-annual Success Sessions with mgmt	Erin	11	Operationalize Pod Structure	Jess	12	Incorporating CWI into Website	Allison	13	Content Strategy: Pillars, Plan, Execution	Allison	14	Intranet: Client Engagement Processes	Allison	15	Drip Accounts	Jill	16	Intranet: Delivery & Core Processes	Tim	17	Data Reporting for Tech Department	Matt	<table border="1"> <tbody> <tr><td>1.</td><td></td></tr> <tr><td>2.</td><td></td></tr> <tr><td>3.</td><td></td></tr> <tr><td>4.</td><td></td></tr> <tr><td>5.</td><td></td></tr> <tr><td>6.</td><td></td></tr> <tr><td>7.</td><td></td></tr> <tr><td>8.</td><td></td></tr> <tr><td>9.</td><td></td></tr> <tr><td>10.</td><td></td></tr> </tbody> </table> <p>Prioritize:</p> <ul style="list-style-type: none"> • Identify • Discuss • Solve 	1.		2.		3.		4.		5.		6.		7.		8.		9.		10.	
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