**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

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| **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
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**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)
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