



Company Objectives *[Fiscal Year]*

Sales and Profit Goals

New Office

Marketing Goals

Administrative Goals

ABC Advertising, Inc.

MISSION STATEMENT

To help our clients achieve growth and success
by providing the best possible marketing strategies
through a commitment of dedicated service
and in a spirit of creative teamwork.

Sales and Profit Goals

Annual sales goals will be targeted in six primary categories.

1. Consulting/Copywriting	\$144,000
2. Printing Sales	\$720,000
3. Design	\$420,000
4. Creative Sales	\$300,000
5. Internet Development & Hosting	\$ 60,000
6. Media Revenues	\$480,000
Total Sales Revenues	\$2,124,000
Profit Goals	\$ 170,000

Strategy	Goal Tender	Target Date
1. Target 10 ideal prospects for campaign.	Burrows	November 30
2. Analyze purchasing/pricing procedures.	Foster	January 15
3. Update profile of our 10 closest competitors.	Dengle	December 30
4. Maintain regular contact with existing accounts.	Esposito	Monthly
5. Join organizations for networking	Esposito	December 1

Burrows - Rotary, TEC,SBRN, Jax-Mac, Chamber

Louganis - AMA, Rotary, N. FL Builders, REALTORS Assoc., NFFA

Dengle - Jax-Mac, PRSA

Esposito - AMA,

Foster - Jax Chamber, Clay Chamber

Eberhardt - Jax Mac

Milkowski - NFFA

Burrows - AIGA

New Office Goals

- To build a new office to project our professional and creative image with an organized, creative office environment that allows everyone to:
- Perform their respective jobs in an effective and efficient manner.
- Create and promote a mutual respect for each member of the team.
- Create an enjoyable and warm working environment.

Strategy	Goal Tender	Target Date
1. Sign contract to begin building.	Burrows/Louganis	October 30
2. Complete new office space planning.	Burrows/Louganis	November 30
3. Select office furnishings.	Foster	January 30
4. Select a new phone system.	Foster/Eberhardt	January 30
5. Liquidate paper inventory.	Milkowski	December 31
6. Plan physical move to new location.	Milkowski	March 1
7. Plan computer network layout for new office.	Graham	January 30
8. Develop signage for new office.	Chan	January 30
9. Explore agency marketing opportunities.	Dengle	Ongoing

Marketing Goals

- To actively market ABC Advertising, Inc. to a targeted and select group of prospects.
- Develop relationships with key business leaders in the community for networking possibilities.
- Pursue other agencies for merger/acquisition consideration.
- To develop a marketing plan to communicate our reputation for high quality, timely and effective communications for increased sales.
- To create an awareness of our agency with prospects and within our industry.
- Develop a format for making client presentations.

Strategy	Goal Tender	Target Date
1. Update Agency website.	Chan/Burrows	November 30
2. Update Agency presentation materials.	Burrows	February 15
3. Develop/implement Agency marketing plan.	Louganis	November 30
4. Develop stronger media relations.	Dengle/Eberhardt	Ongoing

Administrative Goals

- Encourage and facilitate continued growth and education in each person's related field.
- Streamline office procedures for efficiency and accuracy.
- Convert office to effective use of today's technology.
- Become keenly aware of daily goals for company over personal job function.

Strategy	Goal Tender	Target Date
1. Refine traffic management system to increase efficiency.	Stephanos	December 30
2. Organize and create a single system for estimating, billing & purchasing procedures.	Foster	December 30
3. Review and update Agency Handbook.	Dengle	November 15
4. Post Agency Handbook online.	Chan	December 30
5. Update client/vendor databases.	Stephanos	Monthly
6. Unify and standardize online communications.	Burrows	December 30
7. Review agency training/education program.	Eberhardt	December 30
8. Review technology systems.	Chan	January 30
9. Develop in-house research department.	Louganis	March 30

Sales and Profit Action Items

1. Target ten ideal prospects for our next campaign.

Chair: Pete Burrows

Completion Date: November 30

By adding ten substantial accounts to our client list this year, we will establish the base we need to limit the number of clients we service. By our definition, a *substantial* account would purchase at least \$85,000 in agency services annually. A *large* account would purchase over \$200,000 per year. We aim to reduce our client list to **fifty substantial** accounts. As we target the prospects for our three-part solicitation campaign, we will look at companies in Tulsa as well as outlying areas (125-mile radius) that can use a variety of our services. We will specifically target potential media buying prospects.

2. Analyze and adjust our purchasing/pricing procedures.

Chair: Cameron Foster

Completion Date: January 15

Through a more efficient purchasing method, we can realize additional profits. Currently, we frequently obtain only one price per service. By shopping costs and offering discounts for prompt payment, we can add significantly to our bottom line without increasing the number of orders processed. In the past, we have left dollars off our job estimates that could have increased our margins without negatively impacting receipt of the order or new business. We should evaluate when we are in these situations and take advantage of the perceived value of our agency and each service, rather than simply using a cost-plus pricing method.

3. Update profiles of our ten closest competitors

Chair: Reba Dingle

Completion Date: December 30

By better understanding our competitors, we strengthen our chances for obtaining clients who are not receiving value from their current agency. We also will be aware of potential employees for our agency, and have a good sense for who we are up against when making presentations. If a competitor has a two accounts in conflict, we can be there as a referring agency. By knowing our competitors' price structures, we can increase our margins based on keeping our pricing competitive.

Sales and Profit Action Items *(continued)*

4. Maintain regular contact with existing accounts.

Chair: Joan Esposito

**Completion Date: Ongoing
Preliminary Report November 30**

Most accounts leave an agency due to feeling neglected or receiving apathetic service. In our day-to-day work lives, we get caught up in dealing with only those clients who have projects currently in-house. We do a poor job of planning new business. We typically wait for clients to call us. We neglect accounts that we could draw more business from, and who might decide they could receive better service from another agency who has been trying to pitch their account. We must make a conscious effort to stay in contact with our top fifty accounts. We will analyze our account service practices and establish a regular contact plan to improve our service record.

5. All AE's join organizations for networking opportunities.

Chair: Joan Esposito

Completion Date: December 1

By being a presence in the community, we increase our chances of being referred to new accounts, become aware of new business through leads, rub shoulders with people who can help us get new business, and create a positive impression for our agency. Potential employees can learn of our agency and vendors who work with us can also spread the word of our work in the community. We should develop the variety of networking opportunities available to us, including joining community organizations, non-profit boards, selected advertising/marketing trade associations, and our clients' trade associations. We should also strive to participate in civic organizations where our clients are members or participants.

New Office Action Items

1. Sign contract to begin building.

Chairs: Pete Burrows/Tom Louganis

Completion Date: October 30

We plan to sign the contract to engage the architect in October. Robert Trevelyn is the architect of choice and will work through Prince and Meskin Company in a design/build scenario. Lot 16 in the Carnegie Office Park has been selected by the principals of ABC. Estimated build time is six to nine months. A firm timeline will be established for planning purposes when the architect is officially engaged.

2. Complete space planning for new office.

Chair: Pete Burrows

Completion Date: November 30

ABC's plans for the coming year includes growth to support the hiring of two new employees. As we begin the design of our new space, future growth must be kept in mind as offices are designed and built and space is planned. We must also be cautious not to over-build or overspend. Budgets will be tight.

3. Select Office Furnishings.

Chair: Cameron Foster

Completion Date: January 30

Very little furniture or fixtures will be moved from our existing space to the new building. Once the plans are finalized, a determination must be made as to what can be moved into the new building without negatively impacting the professional impression we are trying to create in our new space. We will need to determine the type, style, colors and costs of the furniture for our new space. The architect will work closely with us on this phase.

4. Select new phone systems.

Chairs: Cameron Foster/Susan Eberhardt

Completion Date: January 30

The phone system will not be relocated to the new building. The technology is antiquated and we need a voicemail option. We should request quotes from at least three companies on similar systems plus additional features. This committee will determine the functionality required from our system; keeping in mind the speed at which technology is changing, we will try to anticipate future needs. Expansion to twenty-five extensions should be considered.

New Office Action Items *(continued)*

5. Liquidate our paper inventory.

Chair: Laura Milkowski

Completion Date: December 31

There will be no room nor any purpose for relocating the paper inventory to the new building. Plans to totally liquidate it by December should be initiated. We should target smaller printers who could use the inventoried printers stock, as well as schools who might accept a donation. Plans to sell the storage trailer and most metal shelving should also be considered by this committee. The new building will have attic storage with 8' ceilings. We should plan to use metal shelving for storing older records, job tickets, plate files, boxes for packing and customer inventory.

6. Plan our physical move to the new location.

Chair: Laura Milkowski

Completion Date: March 1

We will need estimates from several moving companies. We are composing a full day plan for the physical move, a plan for packing and crating of computers and peripherals, and server setup at the new office, coordinated with closing up our current office. Many functions will be performed by our employees, so final packing should be scheduled for the weekend preceding the move to ensure as little disruption for clients as possible.

7. Plan the computer network layout for the new office.

Chair: Ellen Chan

Completion Date: January 30

Cabling for phones, computers and peripherals must be planned. We need to select a specific site for the server, hubs and peripherals, as well as confirm the location of all phone jacks. We may want to look at a wireless hub as an option.

8. Design and order new office signage.

Chair: David Muhler

Completion Date: January 30

We need to determine external and internal signage needs. The architect may aid with this process. Any external signage restrictions should be identified and provided to the developer before proceeding. At least three production cost estimates for signage should be obtained, as well as estimated timelines for completion.

New Office Action Items *(continued)*

9. Explore marketing opportunities.

Chair: Reba Dingle

Completion: Ongoing

Preliminary report: November 30

As we plan the construction of our new building, this committee should identify various means of publicity and exposure to our targeted markets. Regular contact should be maintained during the various construction phases, via our newsletter and e-zine as well as through press releases. A primary focus will be obtaining local and regional news coverage or feature articles about the new offices. The objective is to give our market the perception that ABC Advertising is a growing and successful agency.

Marketing Action Items

1. Update the agency website.

Chairs: Ellen Chan/Pete Burrows

Completion Date: November 30

Our website should offer information about the agency in a creative way that illustrates our talents. While we have a good start for a site, many other agencies have accomplished more. As we target larger accounts this year and actively seek to sell website development, our site will be viewed by more people than at any time since it first went online. This is a great chance to make a name for ourselves and confirm we are serious about e-commerce marketing. Creating a terrific site for our agency serves as a ready-made case study for potential clients. This committee will meet to look at site design and discuss improvements or changes then present a plan for executing improvements.

2. Update agency presentation materials.

Chair: Pete Burrows

Completion Date: February 15

The move will necessitate changes to agency presentation materials. Now is a good time to evaluate content and update information before reprinting. We should also look at the need for additional marketing tools, especially those targeted at higher level prospects.

3. Develop and implement an agency marketing plan.

Chair: Tom Louganis

Completion Date: November 30

While we have used PR as a primary resource for agency marketing in the past, now seems a good time to set an advertising budget. This committee will obtain media kits and select some venues for print and web advertising. We will finalize our plan by November and implement it as soon as is practical to assure the agency's continued success and assist with marketing to our larger prospects.

4. Develop stronger media relations.

Chairs: Reba Dingle/Susan Eberhardt

**Completion Date: Ongoing
Preliminary Report January 8**

To assist with our ongoing media presence, we should develop stronger relationships with all TV, radio and print sales representatives and their editorial counterparts. The possibilities for referrals, use of our agency principals as "experts" for features and business articles, attention to our releases and requests for advertising news features would greatly increase with improved relationships. This is an inexpensive way to market our agency.

Administrative Action Items

1. Refine our traffic management system to increase efficiency.

Chair: Nia Stephanos

Completion Date: December 30

We should be aware of the location, due date, expected delivery date, proof dates and budget on every job that comes into our office. While we have developed the beginnings of a tracking system, we have not fully developed it for daily, accurate reporting. All employees should have online access to job reports for updating and reference. The traffic manager must know the movement of every job to be effective in her responsibilities. Duplication of reports by the art department and copywriting department will also be reviewed by this committee, and system improvements will be recommended. Software options and costs will also be investigated and analyzed.

2. Organize and create an efficient, single system for estimating, billing and purchasing.

Chair: Cameron Foster

Completion Date: December 30

Having multiple procedures for purchasing, billing and estimating were a necessary evil in the early days of our mergers. Learning and keeping up with different systems, and remembering which system applies to which clients is burdensome and inefficient. We must consolidate these procedures into a single system this year. It should be fully computerized and include job estimates, outside costs itemized by quote and invoice, and one estimating worksheet for each agency department (art, print, media, PR, interactive, etc.). Proofing, proposals and invoices should be addressed as well. Our goal is to reduce paperwork and confusing, overlapping procedures, and arrive at a system that works for all departments and all clients.

3. Review and update the Agency Handbook.

Chair: Reba Dingle

Completion Date: November 15

This committee will review all agency policies and procedures for currency and appropriateness. This should afterwards be done on an annual basis. Also, annual employee reviews should be scheduled, and thereafter conducted on a set schedule. An orientation program for agency policies and procedures for new employees, and a probationary review schedule should be established this year.

Administrative Action Items *(continued)*

4. Post the Agency Handbook online.

Chair: Ellen Chan

Completion Date: December 30

When the handbook has been updated, it should be published as a PDF and made available to employees on the server.

5. Update client/vendor databases.

Chair: Nia Stephanos

**Completion Date: Ongoing
Preliminary Report November 30**

All data on clients, vendors and prospects will be consolidated into a database and stored on the server. Users will be assigned password access to appropriate information. We discourage the use of printed lists of the database. As we grow in size, security becomes a larger issue. Now is the time to address these concerns and prepare for our growth. Training will be provided in using online database access. Our software allows extensive and detailed information storage for each client, prospect and vendor. A study of additional information that should be added will be conducted by this committee. AEs will be asked to gather missing information and enter it in the database.

6. Unify and set standard procedures for online communication.

Chair: Pete Burrows

Completion Date: December 30

Currently, PC and MAC users have access to the Internet, but use customized options for online faxing, email, etc. Ideally, all users should use similar email signatures, be able to fax and transfer files. A plan will be created and training provided. Procedures will be formalized so the agency brand is consistently delivered, and all departments have access to essential communications options.

Administrative Action Items *(continued)*

7. Review agency training and education programs.

Chair: Susan Eberhardt

Completion Date: December 30

This committee should identify continuing education opportunities for the various functions of the agency. In addition to continued education in one's field, this committee's priority is to have all employees trained on the efficient use of all applications currently installed on our computers. There should be minimal cross training on systems, also. MAC and PC users should be able to turn each other's systems on and off without the danger of loss of information. Procedures for training new employees and for orientation of new employees should be established. A budget for continued education should be established for the year and allocated by department.

8. Review technology systems.

Chair: Ellen Chan

Completion Date: January 30

A review of all computer systems and applications should be completed this year to determine their useful life. A line-item budget for next year's expenditures should be planned.

9. Develop an in-house research department.

Chair: Tom Louganis

Completion Date: March 30

As we grow in size and sophistication, we need the ability to conduct research internally. This may be very basic research at first, but the need for quick information on clients, prospects, industry trends, the stock market, news and suppliers of services is vital to our success. The research department should be developed, staffed, and procedures put in place for estimating the sale of these services.