Strategic Plan

Core Values	Work like it matters, because Own the outcome, together. Foster healthy relationships		3-Year Picture	
Core Focus	Increase market share via distri	ibution, acquisition, and retention.	Future date: December 31st, 20XX	
Vision	Become a software solutions company that makes everyday work better.		Revenue: \$XXX Million sans acquisitions Measurables: XX new clients annually What Does it Look Like:	
Ideal Customers	Small and medium sized restaurants and retailers looking for in person and online business technology.	Businesses looking for financial technology to sell on their own or to refer their customers and clients to.	 Execute M&A Integrations in Excellence POS Maturation POS is \$XXXM in Revenue with XXK active rooftops Software centric sales execution OnDemand Execution Self Service is generating XXX new customers per month Payroll is \$XXXM in revenue with XX active customers XX% of new sales are 2 product minimum within 60 days Generating \$XXM EARR of X-sell revenue annually from base 	

Overview | Plan on a Page

Objectives	Goals	Priorities	Strategy	Rocks	Roadblocks, Risks, Dependencies
The Why The outcome you're in pursuit of. Directionally orients the work. These start with verbs. (Updated Annually)	What success looks like These are quantifiable measurables that should result from the priorities. (Updated Annually)	The What These are projects or initiatives that are the most important work in direct support of the objectives. These are nouns Project names. (Updated 1H/2H each yr)	The How The choices you're making in your approach to achieve the goals. (Updated 1H/2H each yr)	Rocks These are the chunks of of work that support the goals. Are written in a way that it's either done or not done at the end of the quarter. Has an owner. (Updated quarterly)	What's in the way These are what make things complicated or could prevent completion of the rocks. (Updated quarterly)