

Strategy: One-Page Strategic Plan (OPSP)

Organization Name: We've Got Your Back Insurance Company

People (Reputation Drivers)

Employees









1. Quarterly measure of living core values
2. Quarterly measure of engagement w/ goals
3. Skip level meetings w/ CEO

Customers

1. Retention rate
2. Organic growth w/ existing clients
3. Net Promoter Score

Shareholders

1. Company valuation
2. Projected growth
3. _____

COREVALUES/BELIEFS (Should/Shouldn't)	PURPOSE (Why)	TARGETS (3-5 YRS.) (Where)	GOALS (1 YR.) (What)																													
<p>We walk in all of each other's shoes</p> <p>We are retro and radical - and embrace everything in between</p> <p>Life is short. We work hard, play hard, and make sure everyone has insurance!</p>	<p>We bring a proactive, thoughtful and true, and valued products to our clients who have long seen insurance as an albatross around their necks.</p>	<table><tr><td>Future Date</td><td>2020</td></tr><tr><td>Revenues</td><td>\$20 M</td></tr><tr><td>Profit</td><td>\$10M</td></tr><tr><td>Mkt Cap/Cash</td><td>\$2M</td></tr></table>	Future Date	2020	Revenues	\$20 M	Profit	\$10M	Mkt Cap/Cash	\$2M	<table><tr><td>YR Ending</td><td>2015</td></tr><tr><td>Revenues</td><td>\$8M</td></tr><tr><td>Profit</td><td>\$4M</td></tr><tr><td>MKT Cap</td><td></td></tr><tr><td>Gross Margin</td><td>50%</td></tr><tr><td>Cash</td><td></td></tr><tr><td>A/R Days</td><td><30</td></tr><tr><td>Inv. Days</td><td>Organic growth</td></tr><tr><td>Rev./Emp.</td><td>>30%</td></tr></table>	YR Ending	2015	Revenues	\$8M	Profit	\$4M	MKT Cap		Gross Margin	50%	Cash		A/R Days	<30	Inv. Days	Organic growth	Rev./Emp.	>30%			
		Future Date	2020																													
		Revenues	\$20 M																													
		Profit	\$10M																													
		Mkt Cap/Cash	\$2M																													
YR Ending	2015																															
Revenues	\$8M																															
Profit	\$4M																															
MKT Cap																																
Gross Margin	50%																															
Cash																																
A/R Days	<30																															
Inv. Days	Organic growth																															
Rev./Emp.	>30%																															
<p>Actions</p> <p><i>To Live Values, Purposes, BHAG</i></p>	<p>Key Thrusts/Capabilities</p>	<p>Key Initiatives</p>																														
<table><tr><td>1</td><td>2 days of paid volunteer work per year/per employee</td></tr><tr><td>2</td><td>4 hosted events for our non profit clients annually</td></tr><tr><td>3</td><td>Exec-sponsored innovation team</td></tr><tr><td>4</td><td>Quarterly all team events</td></tr><tr><td>5</td><td>1 new center of influence added quarterly</td></tr></table>	1	2 days of paid volunteer work per year/per employee	2	4 hosted events for our non profit clients annually	3	Exec-sponsored innovation team	4	Quarterly all team events	5	1 new center of influence added quarterly	<table><tr><td>1</td><td>Add health benefits as an in-house offering</td></tr><tr><td>2</td><td>Develop the medical services channel</td></tr><tr><td>3</td><td>Move small accounts to an outsourced model</td></tr><tr><td>4</td><td>Intentionally implement a succession plan</td></tr><tr><td>5</td><td>10 industry standard processes measured at 95</td></tr></table>	1	Add health benefits as an in-house offering	2	Develop the medical services channel	3	Move small accounts to an outsourced model	4	Intentionally implement a succession plan	5	10 industry standard processes measured at 95	<table><tr><td>1</td><td>EOY revenue at \$8M</td></tr><tr><td>2</td><td>Client retention at 95%</td></tr><tr><td>3</td><td>Employee retention of 80%</td></tr><tr><td>4</td><td>3 new centers of influence markets opened</td></tr><tr><td>5</td><td></td></tr></table>	1	EOY revenue at \$8M	2	Client retention at 95%	3	Employee retention of 80%	4	3 new centers of influence markets opened	5	
1	2 days of paid volunteer work per year/per employee																															
2	4 hosted events for our non profit clients annually																															
3	Exec-sponsored innovation team																															
4	Quarterly all team events																															
5	1 new center of influence added quarterly																															
1	Add health benefits as an in-house offering																															
2	Develop the medical services channel																															
3	Move small accounts to an outsourced model																															
4	Intentionally implement a succession plan																															
5	10 industry standard processes measured at 95																															
1	EOY revenue at \$8M																															
2	Client retention at 95%																															
3	Employee retention of 80%																															
4	3 new centers of influence markets opened																															
5																																
<p>Profit per X</p> <p>Profit per client</p>	<p>Brand Promise KPI's</p> <p># of client refunds</p>	<p>Critical #: People or B/S</p> <p> 4 critical succession plans</p> <p> 2 critical succession plans</p> <p> <i>Between green & red</i> 1 plan</p> <p> No succession planning</p>																														
<p>BHAG®</p> <p>Invest \$2M per year back into California-based community programs</p>	<p>Brand Promises</p> <p>100% value guaranteed (or 100% of premium refunded)</p>	<p>Critical #: Process or P/L</p> <p> Achieve <30 AR cycle</p> <p> <45 day AR cycle</p> <p> <i>Between green & red</i> <60 days</p> <p> <90 day AR cycle</p>																														

Strengths/Core Competencies

1. Leaders in the non-profit insurance industry
2. 80 years of experience
3. Blend of experience in our team of employees

Weaknesses:

1. Technically limited
2. New player in two of our critical markets
3. Several key employees close to retirement

BHAG is a Registered Trademark of Jim Collins and Jerry Porras.

Sell

Recordkeeping

- | | | |
|---|---------------------------------|-------------------------|
| 1. Process time - claims to settlement | 1. Sales process - meet to sign | 1. Pre-renewals |
| 2. Appropriate coverage for loss prediction | 2. Revenue growth | 2. Certificate accuracy |
| 3. Customer satisfaction through NPS | 3. Close ratios | 3. |

ACTIONS (QTR) (How)			THEME (QTR/ANNUAL)		YOUR ACCOUNTABILITY (Who/When)																	
Qtr #	Q1 2015		Deadline:	6/30/15	Your KPIs Goal																	
Revenues	\$2M		Measurable Target/Critical #		1	Employee turnover	80%															
Profit	\$750k		Theme Name Watch Us Grow! (like the new museum being built next door) Scoreboard Design <i>Describe and/or sketch your design in this space</i> The new museum is being built next door. We have a museum made of Legos going up with defined revenue markers. The inside is being built based on client NPS markers.		2	Organic growth in sales	<10%															
Mkt Cap					3	Employee feedback on core values	95%															
Gross Margin					Your Quarterly Priorities Due																	
Cash					1	Sponsor, implement and measure quarterly employee events	3/31															
A/R Days	New talent pipeline >5				2	Develop & implement monthly skip level meetings. Measure change	1/31															
Inv. Days	Organic growth <30%				3	Complete annual reviews with comp plans for 2015 implemented	2/28															
Rev/Emp					4	Implement individual goals for all associates, tied to annual rocks	3/31															
Rocks <div style="display: flex; justify-content: space-between;"> Who </div> <table border="1" style="width: 100%;"> <tr> <td>1</td> <td>Identify 8 solid long term producers in Real Estate and Healthcare benefits</td> <td>HR</td> </tr> <tr> <td>2</td> <td>Implement sales system training for all producers - measure increased usage</td> <td>MM</td> </tr> <tr> <td>3</td> <td>Implement NPS process with clients with renewals</td> <td>FB</td> </tr> <tr> <td>4</td> <td>Select small accounts partner</td> <td>TH</td> </tr> <tr> <td>5</td> <td>Product cross training for organic growth with producers</td> <td>KT</td> </tr> </table>			1	Identify 8 solid long term producers in Real Estate and Healthcare benefits	HR	2	Implement sales system training for all producers - measure increased usage	MM	3	Implement NPS process with clients with renewals	FB	4	Select small accounts partner	TH	5	Product cross training for organic growth with producers	KT			5	Identify 8 solid long term producers	3/31
1	Identify 8 solid long term producers in Real Estate and Healthcare benefits	HR																				
2	Implement sales system training for all producers - measure increased usage	MM																				
3	Implement NPS process with clients with renewals	FB																				
4	Select small accounts partner	TH																				
5	Product cross training for organic growth with producers	KT																				

<p>Critical #: People or B/S</p> <ul style="list-style-type: none"> ■ New producer plan & pipeline of 8 candidates ■ 6 new prospects ■ <i>Between green & red</i> 4 new prospects ■ 3 new prospects 	<p>Celebration</p> <p>We will all go to the gala opening of the museum in June if we hit our numbers</p>	<p>Critical #: People or B/S</p> <ul style="list-style-type: none"> ■ Identify & connect solid 8 new producer prospects ■ 6 new prospects ■ <i>Between green & red</i> 4 new prospects ■ 3 new prospects
<p>Critical #: Process or P/L</p> <ul style="list-style-type: none"> ■ Organic growth >10% ■ Organic growth <10% ■ <i>Between green & red</i> <8% ■ <6% 	<p>Reward</p>	<p>Critical #: Process or P/L</p> <ul style="list-style-type: none"> ■ All employees have 2015 goals in place ■ 90% of employees have 2015 goals in place ■ <i>Between green & red</i> 75% ■ 50%

Trends

- | | |
|---|---------------------------------------|
| 1. Mobile access | 4. Organic growth - broader offerings |
| 2. Cross selling with HNW individuals to their Co's | 5. _____ |
| 3. Connecting non-profits with tech | 6. _____ |

BHAG is a Registered Trademark of Jim Collins and Jerry Porras.