



## Strategic Plan for FY 2018 - FY 2020

### Organizational Direction

#### Mission

We are an innovative national real estate information and services provider, facilitating and protecting your real estate transaction.

#### Vision

Inspired people delivering innovative real estate solutions.

#### Core Values

*Collaboration*

*Communication*

*Innovation*

*Integrity*

*Respect*

### Strategic Priorities and Action Plans

#### Strategic Goal: Inspired People

Objective	Schedule	Primary Owner
Create a comprehensive training and development program <ul style="list-style-type: none"> <li>A. Dedicated training resource</li> <li>B. Structured training program</li> <li>C. Career development opportunities</li> </ul>	FY 18	Mandy
Instill our values and vision into our culture <ul style="list-style-type: none"> <li>A. Determine company values</li> <li>B. Create and implement a common strategy</li> </ul>	FY 18	Sam

<ul style="list-style-type: none"> <li>C. Define expectations by position</li> <li>D. Inject company values into position expectations</li> </ul>		
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**Strategic Goal: Innovative Solutions**

Objective	Schedule	Owner
Expand our markets <ul style="list-style-type: none"> <li>A. Social media campaign</li> <li>B. Evaluate viability of target market                             <ul style="list-style-type: none"> <li>a. Review viability of real estate solutions</li> <li>b. Review M&amp;A option</li> </ul> </li> <li>C. Entry into new market</li> </ul>	FY 18 FY 18 FY 19	Jamie & Grace Nick
Leverage business relationships <ul style="list-style-type: none"> <li>A. Create sales &amp; marketing plan</li> <li>B. Review, create &amp;/or enhance lender relationships</li> <li>C. Review, create &amp;/or enhance builder relationships</li> <li>D. Review, create &amp;/or enhance NEI relationship (national relocation)</li> <li>E. Review, create &amp;/or enhance underwriter relationships</li> <li>F. Review, create &amp;/or enhance non-NPD real estate relationships</li> <li>G. Review, create &amp;/or enhance local real estate companies for national solutions</li> </ul>	FY 18	Lisa & Jamie
Diversify service offerings <ul style="list-style-type: none"> <li>A. Research industry requirement                             <ul style="list-style-type: none"> <li>a. Research profitability (cost of entry)</li> <li>b. Research industry horizon viability</li> <li>c. Determine whether solution is centralized</li> <li>d. Determine starting point for solutions</li> </ul> </li> <li>B. New solution adoption</li> </ul>	FY 18 FY 19	Nick

**Strategic Goal: Innovative Systems**

<b>Objective</b>	<b>Schedule</b>	<b>Primary Owner</b>
Engender integrated, efficient and effective systems and processes	FY 18	Shane & Mandy
A. Identify production metrics	FY 18	Mandy
B. Assess alternatives to RQ	FY 18	i2i
C. Create standards for software, disaster recovery, testing & security	FY 18	Shane
D. Improve reporting from production software		
E. Provide SQL training	FY 19	Erich
F. Implement video conferencing & instant messaging	FY 18	Shane
G. Enforce use of defined processes	Now	Erich, Nick, Grace, Mandy
Improve financial reporting		
A. Obtain TCN access to SAGE	FY 19	Sam & Nick
B. Capture production data	FY 18	Mandy
Enhance shared services (HR, IT, Accounting)		
A. Review IT cost vs demand	FY 18	Sam

**Facilitator’s Recommendations for Immediate Next Steps:**

- 1) Finalize core values for the company and include in the final strategic plan document;
- 2) Develop the next level of detail regarding specific tasks, task accountability and schedule parameters for strategic goals and objectives. Integrate the results of this level of planning into the company’s annual operating plan and budget.
- 3) Develop and implement a communication’s plan to share the results of the strategic planning initiative with all staff.

**Foundation for Strategy Development**

<b>Current Service Offerings</b>	<b>Potential Service Offerings</b>
<ul style="list-style-type: none"><li>• Title insurance</li><li>• Escrow closings</li><li>• Property reports</li><li>• Construction loan disbursements</li><li>• 1031 Exchanges</li><li>• UCC searches</li></ul>	<ul style="list-style-type: none"><li>• Flood certification</li><li>• Appraisals</li><li>• Inspections: Septic, Home, Pest</li><li>• Credit reports</li><li>• Home warranty</li><li>• RE sales</li><li>• Boundary surveys</li><li>• Pest Treatment</li><li>• Escrow services</li><li>• Legal services</li><li>• Property &amp; Casualty</li></ul>