Strategic Planning and Management of SMES.

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1. INTRODUCTION.

The present document analyzes, through the development of a strategic plan, the situation in which a company is located, both internally and its action in the face of changes and factors that affect it daily.

I have chosen the startup Sefici Tech Solutions, company that is dedicated to the management of incidents in app and web version, to carry out final degree project. I have chosen this company because I have been working in Blast Off Partners, startups incubator and promoter of Sefici since September of 2016.

Companies are increasingly adapting to the use of new technologies, following a natural evolution given the needs of society, this company has been able to adapt a tedious and very expensive product to the simple format of an app. So it seemed interesting to analyze it from the strategic point of view to see how a startup with high technological content and very incipient in the market achieves penetration and grows following a clear set of strategies.

Nowadays companies must have a strategic plan, without it the company is not heading, having a good strategies to follow is crucial to reach the road to success. A strategic plan helps companies basing their objectives and how they are going to achieve them, thus they form a clear image of where they are and where they want to be and that all the people who integrate the company follow the same line described in planning.

All that information about where the company wants to reach at the medium term will be compound through the balanced scorecard used by Kaplan and Norton (1997) defined as “an acceptable instrument to connect the strategy and its execution, since it translates the strategic lines and objectives of the strategic plan into a series of more concrete objectives, indicators, goals and action initiatives.” The BSC operates from four perspectives (finances, clients, internal processes and resources).
2. **JUSTIFICATION.**

The idea is conceptualized as an answer for market need detected by Sefici’s promoters in a large number of entities: improving communication and incident management through the use of mobile technologies that are easy to implement and use. It is a need poorly covered by the market at the moment, where direct competition leads to a specific niche with solutions of high complexity and cost.

In the months that I have been working on Blast Off partners, I have been able to see closely the performance of Sefici, its achievements and how it was growing day by day and was covering more and more market, so it seemed good idea to do my final degree project of this startup spin off Soluciones Cuatroochenta company.
METHODOLOGY

3. STRATEGIC PLAN.

3.1 What is an strategic plan?

According to Dess and Lumping (2003) "A strategic plan is understood as the set of analyzes, decisions and actions that an organization carries out to create and maintain sustainable comparative advantages in the long term".

Rudolf Grünig and Richard Kühn (2015) a strategic plan is the process which by which strategies are main produced could be called strategic planning:

“Strategic planning is a systematic process; strategy formulation through internal power struggles or simply by muddling through is not strategic planning. The analysis and the guidelines developed by strategic planning are long-term oriented as well the objectives of the planning process is to guarantee the long-term accomplishment of the company’s overriding goals and objectives.”

There are businesses with high profitability and optimal results that at any given moment are paralyzed, enter into recession and also into bankruptcy. Martinez & Milla (2005) says: "Is it the thing of chance or bad luck? Has there been a change in demand, in the market? Could we have foreseen that future to change things?"

The elaboration of a strategic plan shows that an organization has the desire to plan, grow and mark the evolutionary path of the organization (Martinez & Milla, 2005).

It should be able to design the future of the company and, more important, convey these guidelines, contrast them and convince the other agents that interact with the organization of which is the way to success, as stated by Chesterton GK (1874-1936):

"The idea that does not try to become words is a bad idea, the word that does not try to become action is a bad word" (Chesterton GK, 1874-1936).
3.2 What is it for?

The objective of a strategic plan changes according to the type of company, the economic-financial situation and the business maturity, among others. What does not change are the benefits of making a strategic plan. (Martinez & Milla, 2005)

The strategic plan, carried out in a systematic way, provides notable advantages for any business organization: (Martinez & Milla, 2005)

- It forces the company management to think, systematically, in the future.
- Identify the changes and developments that can be expected.
- It increases the predisposition and preparation of the company for change.
- Improve activities coordination.
- Minimize non-rational answers to unexpected events.
- It reduces destination and goals conflicts about the company.
- Improves communication.
- Available resources can be adapted for reaching the opportunities.
- The plan provides a useful framework for ongoing review of activities.
- A systematic approach to strategy formation leads to higher levels of return on investment. (Martinez & Milla, 2005).

3.3 Strategic plan elaboration phases.

Figure 1. Strategic Plan Phases.

Source: (Martinez and Milla, 2005, La elaboración del plan estratégico y su implementación a través del cuadro de mando integral).
The **strategic analysis** could be considered as the starting point of the process. It is done in advance to be able to effectively implement the strategies proposed. (Martinez & Milla, 2005)

The **strategic formulation** can be developed in several levels:

- **Corporate Strategies**: questions that include the business portfolio of the company.
- **Competitive Strategy**: develop strategies to achieve a competitive advantage (leadership in costs and / or differentiation, specialization in specific segment or cover an activity sector of greater scope.
- **Operational strategies**: use of the value chain as a managerial tool to identify sources of competitive advantage. (Martinez & Milla, 2005)

The **strategic implementation** make sure that the company have optimal strategic controls and organizational design. (Martinez & Milla, 2005)
4. STRATEGIC GOALS.

4.1 Vision, Mission, Corporative Values and Strategic Objectives.

VISION can be defined according to Martinez & Milla (2005) as "the statement that determines where we want to go in the future. A vision may or may not succeed, it depends on whether the rest happens according to the company's strategy."

The characteristics of vision in a company are:

- A broadly inspiring and long-term goal.
- It provides a specific statement of values, aspirations and goals within the company.
- It is broader than simple goals.
- Implementing it in company is part of the leader's functions within the company.
- It should have slogans qualities, be attractive and attract attention.
- Answer the question: What do we want to be? (Martinez & Milla, 2005)

The MISSION has to be a more specific statement focused on the means through the company will compete in a particular sector. (Martinez & Milla, 2005)

According to Martinez & Milla (2005) mission characteristics in a company:

- It encompasses both the purpose of the company and the competitive base and competitive advantage.
- It incorporates the concept of stakeholder management, suggesting that organizations must answer to multiple agents related to them to survive and thrive.
- Mission is something that must be tackled. The primary objective towards which the plans and programs that are marked should be directed.

Figure 2: Mission answers.

<table>
<thead>
<tr>
<th>Why do we exist?</th>
<th>In what business?</th>
<th>How to develop them?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Source: Own elaboration about (Martinez and Milla, 2005, La elaboración del plan estratégico y su implementación a través del cuadro de mando integral).</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

About corporate values are Martinez & Milla (2005) "collective ideals and principles that guide the reflections and actions of an individual or a group of individuals. They are
the axis of conduct of the company and are closely related to the purposes of the company. “

Figure 3. Business conduct: intangible values.

Source: (Martínez and Milla, 2005, La elaboración del plan estratégico y su implementación a través del cuadro de mando integral).

Corporate values define the company character and describe what the company represents, therefore, are often defined as part of the set of propositions that constitute the corporate identity. (Martínez & Milla, 2005)

The business philosophy establishes the conduct rules by which the organization must be governed. It serves to guide the company’s policy towards the different reference groups.

The corporate identity of a company must be understood as the set of characteristics or attributes that allow it to differentiate it from other organizations.

STRATEGIC OBJECTIVES are used to make the mission statement operational. They help providing direction to how the organization can meet or move toward the highest objectives of goal, vision and mission hierarchy. (Martínez & Milla, 2005)

For the objectives to make sense they need to satisfy several criteria:
• **Measurable.** There must be at least one indicator that can measure the progress of the objective to achieve fulfillment.

• **Specific.** It provides a clear message about what is needed to be done.

• **Appropriate.** It must go according to the vision and mission of the organization.

• **Realistic.** It should be an reachable goal and in accordance with the organization's capabilities and the opportunities of the environment.

• **Timely.** It requires having a deadline for meeting the goal. (Martinez & Milla, 2005).

### 4.2 Strategic business units.

It is defined as a part of the company whose products or services, sales force, competitors and customers are significantly different from the rest of the company's activities.

It is basically based on three dimensions:

- The service or the basic function provided by the product to the customer (product).
- Existing technologies, capable of producing the function for the client (technology).
- The different groups of buyers that are part of the target market (market) (Martinez & Milla, 2005).
5. SURROUNDING ANALYSIS.

5.1 General Environment (PESTEL)

Forecasting, exploring and monitoring the environment is very important for detecting trends and key events in the past, present and future of society. The success or survival of society is due in many cases to the capacity it develops to predict the changes that are going to take place in its environment. (Martinez & Milla, 2005)

The PEST analysis defines four key factors that may have a direct influence on business performance.

Figure 4. General environment analysis.(PEST)

Source: (Martinez and Milla, 2005, La elaboración del plan estratégico y su implementación a través del cuadro de mando integral).

Economic factors. There are many influential economic factors in a society's environment, but not all of them have a relevant impact on the sector activity, therefore, society must choose those whose evolution can be useful to consult. (Martinez & Milla, 2005)

Examples:
• Evolution of GDP and the economic cycle.
• Product demand.
• Employment
• Inflation.
• Energy costs.
• Costs of raw materials.
• Celebration of special events.

**Technological factors.** They generate new products and services and improve the way in which they are produced and delivered to the end user. Innovations can create new sectors and alter boundaries in existing sectors. (Martinez & Milla, 2005)

*Examples:*
Technological innovations.
Internet and virtual commerce.
Government actions.
Public incentives.

**Political factors.** Political processes and legislation influence the regulations of the environment to which sectors must submit. Government legislations can clearly benefit or prejudice a company's interests. (Martinez & Milla, 2005)

*Examples:*
Expected political changes.
Changes in labor legislation.
Grants and incentives by governments.
Tax and social security legislation.
Legislation concerning the environment, safety and risk prevention.
Legislation relating to consumer protection.
Public incentives.

**Social and demographic factors.** Demography is the element of the simplest environment to understand and quantify. It is the root of many changes in society. Demographics include elements such as the age of the population, increasing or decreasing levels of wealth, changes in ethnic composition, geographical distribution of the population and disparity in income level. (Martinez & Milla, 2005)
Examples:
Prolongation of the family life of young people.
Level of wealth of society.
Ethnic composition of society.
New role of the working woman.
New lifestyles and trends.
Aging of the population.

5.2 Competitive environment (Porter)

There are many features in a sector Michael E. Porter (1998) that determine the intensity of competition and the level of profitability. Its model of the five competitive forces considers that the profitability of a sector is determined by five sources of competitive pressure. The intensity of each of these competitive forces is determined by a series of key structural variables, as shown in the figure below: (Robert M. Grant, 2006).

Figure 5. Porter’s five competitive forces model.

The threat of entry of new competitors. In many sectors new competitors can not enter into the same conditions as established companies. The size of the advantage of these on the incomers (in terms of unit costs) measures the height of entry barriers, which determine the extent to which the sector can, in the long run, obtain profits above the competitive level. The main sources of barriers to entry are the necessary investment, economies of scale, cost advantages, product differentiation, access to distribution channels, legal and administrative barriers and reprisals.

The rivalry between established competitors. The rivalry between companies in the sector is the main determinant of the situation of the global situation of competition and levels of profitability. There are six factors that play an important role in determining the nature and intensity of competition between established firms: concentration, diversity of competitors, product differentiation, overcapacity, exit barriers and cost conditions.

The bargaining power of buyers. Companies operate in two classes of markets: those of productive factors and products. In both markets transactions create value for buyers and sellers. The way in which this value is distributed in terms of profitability depends on the relative economic power of each one of them. The product markets are analyzed first. The strength of a company’s bargaining power facing its customers is determined by two sets of factors: buyers' sensitivity to price and relative bargaining power.

The bargaining power of suppliers. The analysis of the determinants of relative power between the sector’s companies and its suppliers is analogous to the analysis of the relations of these companies and their clients. The key is the ease with which companies in the sector can choose between the different providers of a productive factor and the relative bargaining power of each part. (Robert M. Grant, 2006).

5.3 Competitive position analysis.

As Robert M. Grant (2006) has pointed out:

*Information on competition is not simply a collection of data. The problem is probably not having too much information, but too much. The key is to make a systematic approach that determines what information is needed and for what purpose it will be used. The goal is to meet our rival. To predict competitive behavior Porter proposes a model that consists of four parts:*
1. **Current strategy of competitors.** To understand how your rival will behave in the future we must first understand how he is competing right now. In the absence of pressures to change, a reasonable assumption is that the company will continue competing as it is currently doing. To get an overall idea of a company's strategy, it is crucial to relate the contents of top management communications (to investors, media and financial analysts) to a commitment of resources. For both sources of information, the company's website is invaluable.

2. **Objectives of the competitors.** To determine likely changes in a competitor's strategy it is crucial to know the objectives pursued. It is crucial to know as well if the company is guided by financial or market objectives. The current level of the company in relation to the objectives of the competitors is an indicator of possible strategic changes. The more satisfied a company is with its results, the more likely it is to maintain the current strategy.

3. **Assumptions of the competitors on the sector.** A competitor's strategic decisions are conditioned by his perceptions about himself and the world, which in turn are guided by the assumptions he drives about the industry and business in general. Both probably reflect managers beliefs about their sector and the success factors in it. These beliefs assumed by the sector as a whole on the factors of success have been described by J.C. Spencer (1989), as “the recipes of the sector”.

4. **Competition’s resources and capabilities.** Assessing the likelihood and seriousness of a potential challenge from a competitor requires calculating the strength of its resources and capabilities. What are your financial resources, brand image, operational capacity and managerial skills? For example if our competitor has a lot of liquidity, it would be very unwise for us to start a price war by initiating a price decrease. On the contrary if we direct our competitive initiative towards the weaknesses of our rival will be difficult to respond. (Robert M. Grant, 2006).
6. INTERNAL ANALYSIS.

The analysis of the value chain, which separates the activities of the company into a sequential chain. Michael Porter's value chain representation distinguishes between primary activities (those related to the transformation of inputs and the relationship with the customer) and supporting activities. (Robert M. Grant, 2006).

![Porter's value chain diagram]

Figure 7. Porter’s value chain.

6.2 Value chain analysis.

Among the primary activities of a company are the following: (Dess and Lumpkin, 1984)

- **Internal logistics.** The primary activity of internal logistics is associated with the reception, storage and distribution of raw materials towards the product. It includes material collection, storage, inventory control, transportation scheduling and returns to suppliers. In this activity it is essential to reach maximum efficiency since it is where the main delays of production are born.

- **Production.** Production includes all activities associated with the transformation of the raw material into the final product, including machining, packaging, assembly, testing, painting and preparation of facilities.

- **External logistics.** They are associated with the collection, storage and distribution of the product or buyers’ services. They include finished products, storage, material
collection, distribution through transport operations, order processing and scheduling.

- **Marketing and sales.** Marketing and sales activities are associated with purchases of products and services by end users, as well as the incentives used to make them buy. They include activities of advertising, promotion, sales force, references, selection of the chain, relations with the chain and pricing.

- **After sales services.** This primary activity includes all activities associated with raising or maintaining the value of the product, such as installation, repair, training, component supply and product adjustment.

Support activities in the value chain are involved in competitiveness within any industry and can be divided into four generic categories:

- **Supplies** It refers to the function of buying the material used in the value chain of the company. Purchased materials include raw materials, supplies and other consumable items, as well as assets such as machinery, laboratory equipment, office equipment and buildings.

- **Technological development.** we can affirm that all activity of value contains in itself technology. The set of technologies used in most companies is very broad, ranging from technologies used to prepare documents and transport goods, to technologies incorporated in processes and equipment, or in the product itself. (Bensaou, M and Earl, M, 1998)

- **Human resources management.** It consists of a number of activities including general management, planning, finance, accounting, legislation, government issues, quality management and information systems. (Dess and Lumpkin, 1984).

- **General Management (Company’s Infrastructure):** The company’s infrastructure consists of a number of activities which include general management, planning, finance, accounting, legislation, government affairs, quality management and systems of information.
7. SWOT ANALYSIS.

According to Martinez and Milla, (2005) “the SWOT analysis summarizes key aspects of a business environment analysis (external perspective) and the strategic capacity of an organization (internal perspective)".

Indicated by Martinez and Milla, (2005) there are two different perspectives:

The internal perspective: Is related with the strengths and weaknesses of the business, aspects on which the company managers have some degree of control.

The external perspective: detect the opportunities offered by the market and the threats that the business must face in the selected market. It is about taking full advantage of those opportunities and overriding or minimizing those threats, circumstances on which project promoters have little or no direct control.

The objectives pursued with this SWOT analysis are to convert weaknesses into strengths and threats into opportunities. The procedure for conducting the SWOT analysis is as follows:

1. Identify the key changes in the organization’s environment, following the type of analysis described in the “analysis of the environment (general and competitive)".
2. Analyze the profile of the resources and capabilities of your organization, following the type of analysis described in the "internal analysis".
3. Graph the previous results in a matrix of four quadrants.
4. To agree with the management team the results of the previous analysis.

Figure 8. SWOT Analysis

<table>
<thead>
<tr>
<th>INTERNAL PERSPECTIVE</th>
<th>EXTERNAL PERSPECTIVE</th>
</tr>
</thead>
<tbody>
<tr>
<td>WEAKNESSES</td>
<td>STRENGTHS</td>
</tr>
<tr>
<td>THREATS</td>
<td>OPPORTUNITIES</td>
</tr>
</tbody>
</table>

Source: (Martinez and Milla, 2005, La elaboración del plan estratégico y su implementación a través del cuadro de mando integral).
7.1 Limitations of the SWOT analysis.

The SWOT analysis is a tried and true strategic analysis tool. It is used regularly in business to initially assess the opportunities and threats of the environment, as well as weaknesses and internal strengths of the company.

The limitations of the SWOT analysis are mainly: (Dess and Lumpkin, 2003)

- **Strengths may not lead to an advantage.** The strengths and capabilities of a company, no matter if they are unique or important, may or may not be able to gain a competitive advantage in a market.

- **The SWOT approach to the environment is too narrow.** Strategies that trust on the traditional definitions of a sectoral and competitive environment often have too narrow views on existing customers, technologies and competitors.

- **The SWOT provides an instant view of a changing goal.** A key weakness of SWOT is that it is a static analysis. It focuses too much attention on the company at a particular time, however, competition between companies is played over time.

- **SWOT oversize’s a single facet of the strategy.** Sometimes companies worry about a unique strength or key feature of the product they are offering and ignore other factors necessary for competitive success.
8. STRATEGY SELECTION.

Strategies exist at the different levels of an organization, says Martinez & Milla (2005).

**Corporate strategy** is related to the overall objective and reach of the organization to meet the expectations of the owners or key stakeholders, and add value to the different parts (often individual businesses).

The definition of business types, geographical coverage, products or services typology offered are included in the corporate level of the strategy.

**Competitive strategy** refers to how to compete successfully in a given market; It is a matter of knowing how to advantage of competitors, what new opportunities can be identified or created markets, what products or services should be developed in each market, and the extent to which they meet the needs of consumers.

**The operational strategy** deals with how the different components of the organization, in terms of resources, processes, people and their skills, make effective corporate and competitive strategy.

Within the strategies of portfolio of business (corporate strategy):

8.1 Corporate Strategy - Growth-participation matrix (Boston Consulting Group)

The growth-participation matrix is a very useful tool to analyze the operations of the diversified company and see it as a business portfolio. This technique provides a frame of reference for categorizing the different businesses of a company and I want to finish its implications in terms of resource allocation. (Martinez & Milla, 2005)

The growth-participation matrix is based on two main dimensions:

1. The industry growth rate indicates the annual growth rate of the industry market to which the company belongs.
2. The market share, which refers to the market share of the SBU (strategic business unit) in relation to its most important competitor. It is divided into high and low, and is measured in logarithmic scale.

The Growth-Participation matrix aims to establish two aspects:

1. The competitive position of the SBU within the industry.
2. The net cash flow necessary to operate in the SBU.

The SBU is characterized according to the quadrant where they are published, in stars, question marks, cows and dogs. Its characteristics are as follows:

**Figure 9. Boston Consulting Group Matrix**

<table>
<thead>
<tr>
<th>SBU located in the star quadrant.</th>
<th>SBU located in the interrogation quadrant.</th>
</tr>
</thead>
<tbody>
<tr>
<td>• High relative participation in the market.</td>
<td>• Low market share.</td>
</tr>
<tr>
<td>• Gratefulness market.</td>
<td>• Markets growing quickly.</td>
</tr>
<tr>
<td>• Consumers of large amounts of cash to finance growth.</td>
<td>• Demand large amounts of cash to finance growth.</td>
</tr>
<tr>
<td>• Significant benefits.</td>
<td>• Weak growth generators.</td>
</tr>
<tr>
<td></td>
<td>• The company must evaluate whether it continues to invest this business</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>SBU located in the cow quadrant.</th>
<th>SBU located in the dog quadrant.</th>
</tr>
</thead>
<tbody>
<tr>
<td>• High participation in the market.</td>
<td>• Low market share.</td>
</tr>
<tr>
<td>• Slow growth market.</td>
<td>• Slow growth market.</td>
</tr>
<tr>
<td>• They generate more cash than they need to grow in the market.</td>
<td>• They can generate few benefits or sometimes lost.</td>
</tr>
<tr>
<td>• They can be used to create other businesses.</td>
<td>• They should generally be restructured or eliminated.</td>
</tr>
<tr>
<td>• Starting on high profits.</td>
<td></td>
</tr>
</tbody>
</table>

Source: Own elaboration based on (Martínez and Milla, 2005, La elaboración del plan estratégico y su implementación a través del cuadro de mando integral).
8.2 Competitive Strategy:

There are three generic strategies Michael E. Porter (1987):

1. Cost leadership.
2. Differentiation.
3. Specialization.

8.2.1 Cost leadership.

It is based on the creation of a low-cost position in relation to competing companies. With this strategy, a company must manage the relationships along the value chain and should also be willing to reduce costs in all parts of them. (Michael E. Porter, 1987)

At the origin of the strategy of leadership in costs we can distinguish three large groups: (Gimbert, 2003)

- Structural sources.
- Own management of the company.
- External to the company.

8.2.2 Differentiation.

It consists in creating differences in the offer of products and services of the company by creating a good tribute characteristic that is perceived as unique and valued by the consumers with respect to the sector of the activity. Differentiation can take different forms: (Michael E. Porter, 1987)

For example: prestige or brand image, technology, innovation, features, customer service or distribution network.

8.2.3 Specialization.

It is based on a narrow competitive field within the sector. A company that follows a strategy of specialization selects a segment or group of companies and designs its strategy to serve them to measure. The essence of specialization is the exploitation of a particular market niche is different from the rest of the sector, this has two variants:
Cost specialization, in which the company struggles to create a cost advantage in its target segment.

Specialization differentiation way, linking a company seeks to differentiate itself in its target market.
9. BALANCED SCORECARD (BSC).

9.1 Concept.

In order to construct a measurement system that describes the strategy we need a general model that will serve as a basis. The BSC offers this framework to describe strategies designed to create value.

Strategy is not a unique management process, but rather a step in a long chain that takes a company from a high-level mission statement to work done by employees at any level of the organization.

The framework of the WCC is circumscribed in a broader set of elements that develops the strategic process of a company, according to the following scheme proposed by (Kaplan and Norton, 2001).

9.2 Basic elements of the BSC.

9.2.1 Strategic map.

According to Kaplan and Norton (2004):

*A strategic map should provide a simple, coherent and uniform way to describe a company's strategy, in order to be able to set goals and indicators and, more importantly, be able to manage them. In this way the strategic map becomes the missing link between the formulation of the strategy and its execution.*

For this to be the case, the strategic map must meet several basic principles: (Kaplan and Norton, 2004)

1. **The strategy assumes the balance of contradictory forces.** Achieving long-term returns (necessary to ensure sustainable growth of shareholder value) is in direct conflict with the achievement of good short-term financial results. Moreover, it is possible to substantially improve short-term results through the elimination of long-term expenditure and investment (For example: product innovation activities, training and improvement of staff training, etc.)
5. **The correct definition of the customer value proposition is critical in the strategic process.** If customer satisfaction is the source of sustainable value creation, the correct definition of target customers and the value proposition to satisfy them is the most important dimension of the strategy.

6. **Value is born in internal processes.** The financial and client perspective are "external" perspectives that describe results regarding what the company expects to achieve. On the contrary, the objectives related to internal perspectives and strategic capabilities correspond to the "internal" scope of the company. It refers to those on which your customer value proposition stands. (Operations management, customer management, innovation, regulatory and social processes).

7. **The strategy must be related with all internal processes to be integral.** Strategies must be comprehensive in that they incorporate at least one strategic theme from each of the four internal groups.

8. **The value of intangible assets arises from its ability to assist the implementation of the strategy.** The fourth perspective of the strategic map, that of strategic capabilities, describes the intangible assets of the company and the role they play in the strategy. Intangible assets can be classified into three categories (human capital, information capital and organizational capital).

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9.2.2 Perspectives.

9.2.2.1 Financial Perspective.

The **financial perspective** is presented in the BSC above the rest, in order to convey that the financial objectives of the company are the ultimate goal of its strategy. Financial strategies are based on a simple principle: you can only make more money by selling more or by spending less, or a combination of both. Any initiative, plan of action, etc., only creates more value for the company if it manages to increase sales or reduce expenses. So we can conclude that the financial activity of the company can be improved through two basic approaches: growth or productivity. (Milla & Martinez, 2005)
• **Growth strategy:** Companies can generate revenue growth in two ways:

1. New sources of revenue: New products, new customers, new markets, etc.
2. Increasing the loyalty of its current customers in order to increase their sales to them, through loyalty plans.

**Productivity strategy:** The second way of improving the financial perspective can also be achieved in two ways:

1. Improvement of the cost structure is achieved by reducing the costs of the company, so that, keeping the turnover, any reduction of costs of materials, personnel, supplies, etc., causes improvement in the results of the company.
2. Through better utilization of assets. Improving the efficiency of asset management reduces the level of current and fixed assets required for the given level of turnover. (Milla & Martinez, 2005)

### 9.2.2.2 Objectives and Indicators.

The top goal of any for-profit company at the top of the financial perspective should be to maximize value creation for the shareholder.

The most common objectives with this perspective are related to the following aspects:

**Value:** This is the ultimate goal of every company. Although it is difficult to measure in recent years new theories have emerged. Some of the indicators evaluated by Altair Consultores (2002) are: EVA (Economic value added), MVA (Market value added), CFROI (Cash flow return on investment), SVA ) And TRS (Total Shareholder Return).

**Sustainability:** Decisions can be made to increase value in the short term but they do not have sustainability over time and destroy the initial idea, which is why long-term orientation is important.

**Sales figures:** can be quantitative (sales growth, sales maintenance or even sales reduction), but also qualitative as (proportion of sales in various business lines, sales mix products, sales in a certain segment or geographical area to Boost, etc.).
**Profitability**: These objectives can be explained through several indicators:

1. Operating margin.
2. EBITDA.
3. Rotation of assets.
4. ROI.
5. ROE.

**Costs**: Related to rationalization and / or reduction of expenses, usually emphasizing the impact of structure costs.

**Financial Structure**: The choice of different financial structures is not neutral on the creation of value (by the funds that facilitate to make new investments, the cost of the financial structure, etc.) reason for which it is usual to set objectives on the financial structure on some strategic maps.

**Liquidity**: It is usually represented by indicators such as the cash flow of the shares, the volume of operational needs of funds (NOF) on sales, the average maturity period (PMM). (Milla & Martinez, 2005).

### 9.2.2 Customer Perspective.

The customer perspective defines the value proposition for the target clients. This means answering the following generic question: in order to achieve our financial goals, how should we appear before our customers? (Milla and Martinez, 2005).

### 9.2.2.1 Customer value proposition.

According to Kaplan and Norton (2004) we can define it as:

*The value proposition defines the company’s strategy for the client by describing the unique combination of product, price, service, relationship and image that a company offers to the customers it has in its objectives. The proposition of value or different than the competition.*
The elements that form part of the value proposition according to Sponsor Management Consulting (2000) summarize them:

1. Price.
2. Delivery term.
4. Product.

In addition, the value proposition of a company must meet the following requirements:

1. It must be linked and coherent.
2. Adapted to the market to which the company is directed.
3. Better than the competitors.
4. Public.
5. You must differentiate between final customers and intermediates.

9.2.2.2 Competitive Strategies.

M. Treacy & F. Wiersema (1995) realized that to be a leader there were 3 generic competitive strategies:

Figure 10: Value Discipline.

1. **Operational Excellence:** "Operationally excellent companies offer a combination of quality, price and ease of purchase that no other competing company can meet." (M. Treacy & F. Wiersema, 1995)

   1. Low prices.
   2. Sufficient, but limited product range (selection).
   3. Zero defects (quality).
   4. Increase.

2. **Product Leadership:** According to M. Treacy & F. Wiersema (1995) "Leading companies in their products make them highly desirable or necessary for their customers." The characteristics of these companies are:

   1. Important effort in marketing to promote its brand image and its products.
   2. High investments in R & D, in order to launch new products to the market.
   3. Functionality of the products offered.

3. **Customer Intimacy:** According to M. Treacy & F. Wiersema (1995) "Leading companies in their customer relationships know the people they sell and the products and services they need." The attributes that companies have that are intimate with customers are:

   - Knowledge of the client through different communication channels.
   - Solutions offered.
   - Penetration.
   - Availability.
   - Culture to drive customer success.
   - Long-term relationships with customers.

3.2.2.3 **Objectives and Indicators.**

**Number of customers:** It details the objective in terms of customers and in which segments and/or markets the new customers are desired, clearly explaining which segments and target markets. (Alfonso López Viñegla, 2003)

**Satisfaction:** Through an attractive value proposition and with an implementation in the market of that value proposition in an excellent way. The key to this type of goal is the customer's perception of the product and the company.
Some examples of indicators are:

1. **Price.**
   - Strategic price benchmarking.
   - % Discounts offered.
   - Evolution of prices.

2. **Quality**
   - % of customer complaints.
   - Level of service guarantee.
   - % of incidents or defects. Error index on products.
   - Level of personalized attention
   - % Level of response to complaints.
   - Number of incoming and outgoing calls, and duration averages.
   - Times of disposal and occupation of each sales agent.
   - Average response time and total call percentage.

3. **Loyalty:**
   - Maintain the strategic client portfolio for the company, regardless of whether this does not mean an increase in sales.
   - Increasing sales in current customers means increasing revenue per customer.
   - Increasing the customer's share of purchases, means increasing the percentage of the company in the customer's purchase quota, regardless of whether the customer's purchases grow or not.
   - Achieving the sale of a strategic portfolio in current customers means selling a set of products that are strategic for the company in search of the most profitable portfolio, or that allows for greater growth. (Alfonso López Viñegla, 2003).

**Profitability of clients:** not always the largest client is the most profitable, it is necessary a previous implementation of an ABC cost system that depending on the company, is an essential element of the Perspective of internal processes. (Alfonso López Viñegla, 2003)

**Reduction of lead times:** it is really important for companies competing in the same sector with products with similar characteristics and functionalities, same sales prices and quality, where the only differentiating argument on which their competitive strategy is based on delivery deadlines Inferior to those of the competition.
Some of the indicators are:

• % Punctuality and guarantees in service compliance.
• % Punctuality in delivery of products.
• % Repairs made by temporary unit.
• % Reduction of technical support waiting times.
• % Reduced waiting times for the reception of the service offered by the company.

(Alfonso López Viñegla, 2003)

9.2.2 Processes perspective.

They can be organized into four groups:

Operational Management: Those primary processes by which companies produce their products and services and deliver them to their customers. Within the operational management can distinguish four processes: (Kaplan & Norton, 2004)

Customer management: "hey must help the company to acquire, sustain and increase profitable and lasting relationships with the customer. There are four processes of customer management. (Kaplan & Norton, 2004)

Innovation management: If there is no permanent innovation, the company is forced to fight against competition on the basis of prices. An exceptional innovative capability is what determines who is the leader in each of them. There are four processes of customer management. (Kaplan & Norton, 2004)

Regulatory and social processes: National and international regulations on the environment, safety, hygiene at work and the hiring of workers impose requirements that any company must observe and comply with. There are four basic regulatory and social processes. (Kaplan & Norton, 2004)

9.2.4 Strategic capabilities perspective.

Intangible assets have become decisive in the processes of value creation, three major components that must be perfectly aligned with the strategy. (Milla & Martinez, 2005)

Human capital: in which the strategic competences are the skills, talent and know-how to carry out the activities required by the strategy. To measure these capabilities you should follow these steps:
1. Identify the competencies required by the people who carry out each of the internal processes of the strategic map.
2. Definition of the job profile (more detailed analysis).
3. Evaluate the adequacy of the current workforce to the defined job profiles.
4. Identification of the gap between the "theoretical" profile and the current capabilities of the template.

**Information Capital:** Information systems, applications and knowledge management infrastructure needed to support the strategy.

**Organizational Capital:**

1. **Culture:** awareness and internationalization of the mission, vision and values of the company.
2. **Leadership:** have qualified leaders at all levels to mobilize staff towards knowledge and strategy compliance.
3. **Alignment:** objectives and incentives with strategy at all levels of the company.
4. **Teamwork:** sharing knowledge and people with strategic potential. (Milla & Martinez, 2005)
STUDY CASE
10. INTERNAL ANALYSIS.

10.1 Company’s description.

Sefici Tech Solutions S.L is a spin off startup of Soluciones Cuatroochenta S.L company, based in the technological scientist park Espaitec, at the Jaume I University in Castellón, specialist in the development of mobile applications, after seeing a latent demand not satisfied.

Sefici was born after seeing a latent demand not satisfied in the market, providing agile response to incident management in any environment, it is based on two strategic principles:

**Specialization in the technology field:** Sefici appears to facilitate communication within the company in incident management in a very simple and accessible to all: mobile technology.

**Advanced information management:** Incident management generates a large amount of useful data for the company, which can help decision-makers. Sefici is a system for monitoring data and presenting information available to the company.

Sefici has been developed under the principle of:

*“Make something complicated simple”*

It has been achieved by combining two factors:

1. A design and use based on the most booming messaging applications in the industry.
2. Adapted and specialized in the management of incidents, with all the benefits that this implies.

In addition there are 3 fundamental reasons why this project has been carried out:

1. **New improvement opportunities:** The technology has been integrated for several years in the companies for the improvement in terms of efficiency, quality and cost savings. The transmission of information and the improvement of the communication within the companies and of this with its clients has achieved: Reduction of response times, elimination or minimization of bottlenecks, rapid
capture and transmission of data, minimization of work Slope, access to information of the company, improvement of the service to the clients, among others.

2. **The market is changing:** The field of technologies is invading the way of life and how companies are managed. Today, mobile technologies are available to almost any business, however small.

3. **Professional experience:** Sefici is a mobile solution developed by Soluciones Cuatroochenta S.L firm which has developed mobile ad hoc applications for large maintenance companies and companies that move in geographic and physically wide environments. In addition to being driven by Blast Off Partners, startup incubator and project promoter. This experience is reinforced by the work of the market analyst team, highlighting a poorly covered market need to date. The management of incidents under mobile solutions that fulfill two characteristics: flexibility and scalability.

10.2 **Business model.**

Sefici is a tool whose simplicity of use minimizes the cost of implementation and the user learning curve, allowing the self-provisioning and autoadministration.

This creates the perfect stage for distributing Sefici under the software-as-a-service model (Saas); The user pays a monthly amount based on the number of users who will be using the tool. This is achieved by adapting the company price.

Sefici additionally has a market place of modules and add-ons to the application so that customers can expand the functionality of Sefici and adapt it to the idiosyncrasy of their business. The market place continues with the Saas model, each module allows the free trial for one month and after this period, it means an increase in the monthly payment of the customer that contracts it. At present, Sefici has six extra modules and plans to expand them based on the feedback received by customers, and focusing on vertical markets.

Sefici has a combined revenue model, a freemium version for entities and teams of less than five people and a Saas or premium model for teams of 4 or more members.

With this model we aim to expand the market to the maximum, remove obstacles to the acquisition of Sefici and get customers who only pay for what they use, increasing the
diffusion ratio. In turn the market place allows to convert free customers into premium customers, under the provision of additional market place services.

10.3 **Product description.**

Sefici is a mobile application composed of two parts: server and client.

**Server**

It stores all the information related to the application as well as the content management. In addition, a web version has been developed that allows the administrative management of the client account, managing users, categories, connection between users, etc.

**Client**

These are the Android and iOS versions of the app itself.

When a client device for iPhone or Android is installed, the application will download the updated information from the server and send the new information generated (such as creating an incident, or changing its status).

With this, Sefici offers a double product / service:

1. **The application for incident management.**
2. **Dashboard of statistical information,** which allows to use the tool as a source of information for future planning and taking preventative measures to avoid, for example, repetitive incidents. This will be consulted through the web administrator.

10.3.1 **How does it works?**

1º *Create a project.*

Set a title, description and type of project.

There are three types of projects:
Public with authorisation projects: These are visible in the lists of projects but cannot be accessed by all Sefici users. The project admin decides who will have access.

Private projects: These are only visible to the project users.

Open public projects: These projects can be viewed and accessed by any user of the application. The user cannot create this type of project. Get in touch with Sefici Tech Solutions.

2º- Create the categories and add functionalities

A category in the basis for creating incidents (electricity, plumbing, machine…). The more precise the category, the less time spent resolving them on average.

Title: Do not use ambiguous titles. Set the category clearly so that there is no room for doubt.

Pressigned users: They automatically receive the incidents to be resolved in the categories they belong to.

Extra fields: Add the functionalities you need, photos, audio, video, freehand drawing, geoposition, predetermined questions, etc.
3°- Start reporting incidents.

As easy as clicking on the orange button and selecting the category the incident belongs in.

Incidents created will be automatically received by the people we have assigned so as to ensure they are resolved as fast as possible.
10.4 Sefici Owners.

Alfredo R. Cebrián Fuertes.

Alfredo R. Cebrián is founding partner of Soluciones Cuatroochenta and is in charge of developing business in Sefici. In his professional career he has promoted different projects in their initial moments and leaving them in the optimal conditions for their subsequent evolution in the market. His career and professional experience give Sefici the necessary profile to raise the project to its maximum potential and to detect opportunities for development and growth in new markets, sectors ... etc.

Alfredo has quite long experience in companies advising to optimize processes and improve efficiency through technological solutions. He brings to Sefici his experience, knowledge and extensive portfolio of contacts. Alfredo holds a degree in Public Relations and Advertising from the Jaume I University of Castellón and is a regular speaker at various events focusing on technological innovation.

Sergio Aguado González

Sergio Aguado is a Senior Engineer in Computing Management and founding partner of Soluciones Cuatroochenta. As an entrepreneur he has created and directed two software development companies and is highly specialized in the development of software solutions of high technical complexity.

Leads the technical development of Sefici contributing to the project its experience and its ability to analyze and adapt the developments to the market reality. It specializes in different programming languages web and app and in mass data analysis systems or Big Data.
Vicente Montesinos Contreras

After an extensive training in economics and finance, combined with the real experience in business management of Esmalglas, Vicente Montesinos materializes his entrepreneurial vocation in the technological area betting to found a company of web development at an early moment and becoming the first and only Internet centre and provider of web solutions in Europe associated with World Sites International (WSI).

Since then his participation in numerous technological projects as founder, business angel or promoter gives him an experience and vision that are crucial for Sefici.

Blast Off Partners.

It is a platform of technological projects that is differentiated by the real involvement and the close monitoring of each project in which it is involved. It assumes a guarantee to future investors for its work of monitoring and control of the companies it promotes, to which is added the contribution of contacts and know-how.

Its mode of operation means that the number of projects carried out is very limited. Blast Off Partners recognized the potential of Sefici, entering to participate in the project from a very early moment, intervening in the modeling of the business and supporting the project in all the steps it takes.
10.5 Organization chart and structure.

Figure 11: Sefici's Organization Chart.

Sefici has a business philosophy that is not represented with the organizational charts that exist nowadays, however in terms of organizational structure level there is a model that is having great acceptance in startups for representing them fairly faithfully, this is "organization in network with radial structure" because the startups, generally very young, do not usually hire many workers.

This type of structure consists of the core company, in this case Sefici coordinates and integrates the work of the rest and performs activities that generate value. Coordination is done directly and one by one. The type of contract or alliance, with each node is different, according to the purpose of the collaboration in each case. In the case of Sefici is supported by the entire ecosystem Cuatroochenta, so its graphic representation would look like this:
Cuatroochenta: It is a company specialized in the integral development of applications for smartphones and tablets and advanced custom-made programming to improve work processes.

Blast Off Partners: It is promoter platform of technological projects distinguishable by the real implication and the close monitoring of each project in which it is involved. It assumes a guarantee to future investors for its work of monitoring and control of the companies it promotes, to which is added the contribution of contacts and know-how.

Vennova: It is a consultant specialized in web development, marketing, business intelligence and technology owned by Soluciones Cuatroochenta S.L. Vennova make use of the resources in the area of marketing, market research, online marketing and web design and development of the Cuatroochenta team offering services to specific external clients.

Espacio Base: It is a low-cost coworking centre for meeting startups, freelancers and SMEs.

Ce Consulting: Companies Advice in the tax, labor, accounting and legal area.
10.6 Mission and Vision.

Sefici mission’s is to facilitate an efficient, quick and simple management of incidents in any team of people through a mobile solution, making it available to any organization in our community.

Sefici vision’s is to become the mobile application of reference for the report of incidents and cases, to the point of being taken advantage of by any group or community of people in its free version.

10.7 Value chain analysis.

The construction of the value chain is carried out by disaggregating the activities of the company, depending on whether it is directly or not linked to the production process. Based on this criterion, activities can be classified as primary and supportive:

10.7.1 Primary activities.

Internal Logistics: Consists of both freemium and premium customers by downloading the Sefici application.

Operations: It consists of the process that the company performs both initially developing and designing the app and its subsequent customization, in the case of premium customers, since they are the ones who can add extra modules or functionalities, as Sefici grows they are realized Updates of the versions of the app for the improvement of its performance.

External logistics: In the case of Sefici external logistics is presented in the marketplace format as the user downloads the product in both iOS and Android marketplace, so the process is performed only by the user, when the application is downloaded.

Marketing: Online marketing campaigns such as Google Adwords campaigns are being carried out, for a better SEM positioning. They are also generating a database of clients through leads one of the strategic bases of inbound marketing in which the user reaches the page of Sefici and fill out a registration form through which you already have the basic data of that user.
After-sales service: The customer is tracked and freemium users are required to purchase the premium version.

10.7.2 Support activities.

Supplies: In this case Sefici provides the app service of the parent company Cuatroochenta and there is no greater provisioning than that.

Technologies Development: Cuatroochenta is a company that bets very high for the technological development reason why they are in continuous improvements, since they have to adapt to the needs of the market, which is in an environment of constant change, Sefici as a spinoff of Cuatroochenta adapts both to changes in the same way.

Human resources management: Sefici has a flexible business culture as far as workers are concerned, there are no hierarchies and there is flexibility of schedule and freedom to provide improvements that are seen individually.

Company infrastructure: Sefici is in a good financial position as it has received the same funding this year from Enisa. Being a young company presents few benefits but has great potential to continue growing and continue to attract premium customers for a higher income.

10.8 SWOT Analysis.

Below is an internal analysis (Weaknesses and Strengths) and external (Threats and Opportunities) to know the factors that the company faces and to have a clear image of what deficiencies it has and its strengths to face the competition.

Table 1: Sefici´s SWOT.

<table>
<thead>
<tr>
<th>WEAKNESSES</th>
<th>THREATS</th>
</tr>
</thead>
<tbody>
<tr>
<td>New brand.</td>
<td>New and breakthrough solution</td>
</tr>
<tr>
<td>Scarce equipment</td>
<td>Little entrance barriers.</td>
</tr>
<tr>
<td>Limitation of resources</td>
<td>Technological speed.</td>
</tr>
<tr>
<td>New product</td>
<td></td>
</tr>
<tr>
<td>Partner network</td>
<td></td>
</tr>
</tbody>
</table>
10.9 **Strategy selection.**

### 10.9.1 Corporative strategy:

As the corporate strategy of Sefici, according to the BGC matrix (Boston Consulting Group) is an interrogation product-market, its main feature is the fast growth of the mobile applications market, in addition it requires large amounts of cash to finance growth, although in the case of Sefici has achieved funding through Enisa that bets on innovative projects of the Spanish SME, however is intended to eventually become a star product, as it has a high market share.

### 10.9.2 Competitive Strategy:

Sefici's competitive strategy is cost leadership, since the original intention was to streamline the other incident management systems and thus facilitate the process, so being a simple system as an app or web also has some lower costs. In addition being a Spin off company of Solutions Cuatroochenta S.L, there are many services outsourced so the greatest cost savings are made in personnel and services internally outsourced.
11. EXTERNAL ANALYSIS.

11.1 General environment analysis (PESTEL)

11.1.1 Political factors.

Political factors in the app development sector scarcely affect businesses because it is a poorly regulated sector, nor do they affect trade agreements.

11.1.2 Economical factors.

Spain is experiencing economic growth since the end of the economic crisis in 2013 in the first quarter of 2017 GDP has grown by 0.8% which represents a variation of 3% over the previous year.

In the following table we can see the evolution of GDP growth in Spain since the end of the economic crisis:

Table 2: Spanish GDP evolution

<table>
<thead>
<tr>
<th>YEAR</th>
<th>GDP MILL €</th>
<th>GDP GROWTH (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016</td>
<td>1.113.851M€</td>
<td>3,2 %</td>
</tr>
<tr>
<td>2015</td>
<td>1.075.639M€</td>
<td>3,2 %</td>
</tr>
<tr>
<td>2014</td>
<td>1.037.025M€</td>
<td>1,4 %</td>
</tr>
<tr>
<td>2013</td>
<td>1.025.635M€</td>
<td>-1,7 %</td>
</tr>
</tbody>
</table>

Source: Expansión/ datosmacro.com “PIB de España - Producto Interior Bruto 2013”.

Graphic 1: Spanish unemployed evolution.

In the graph we can see the evolution of the unemployment rate in Spain by quarters since the end of 2013 after the end of the crisis, you can see how it presents decreasing values over the years, reason why is generating employment since that the period of economic crisis will end, which is consistent with the growth of GDP discussed above.

In addition, indefinite contracts have fallen from a 30% year-on-year rate at the end of 2011, to grow in 2016 at an annual rate of 13.5%. Spain has had to face a process of economic transformation, as a result of economic globalization and the development of Information and Communication Technologies (ICT).

Another economic factor to be taken into account by the company is the degree of industrialization in Spain, which shows an industrial production index that in July 2016 registered a positive year-on-year growth of 0.3% according to "La moncloa - Government of Spain"

### 11.1.3 Social factors.

According to INE (Instituto Nacional de Estadística), the average annual income per household per person was 10,419 in 2014, a figure 0.3% higher than that of the previous year.

**Graphic 2: Spanish life conditions.**

Source: INE - Encuesta de Condiciones de Vida 2015.
In addition, another social factor is the change in lifestyle that society has experienced in recent years, in which virtually the entire society downloads apps on the mobile or consult the products they want to buy from a smartphone, so the moment of truth occurs in the Zero moment, according to Google's Zmot, this moment is where the consumer seeks and compares brands or companies of the product that wants to acquire, via the internet, so you have to try to capture the attention of the Consumer at that time.

Another factor to take into account is the increasingly high level of demand of app users, in addition users prefer the app version to the web, according to the portal Puro Marketing (2013) based on a study by Compuware, "55% emphasize that they are utilities oriented specifically to fulfill the function and that directly find what they are looking for, 48% emphasizes the speed of navigation, which offers them a positive use experience."

Also Puro Marketing claims that other studies of Compuware affirm the change in trend towards the app, between using the website for navigation or the app, 85% of users are left with the app.

11.1.4 Technological factors.

According to the ABC Newspaper (2017), there are 10 technology trends that will appear or will be developed in 2017. More products that will complement the smartphone such as wrist accessories and wearables of all types will appear, these smart watches will be able to scan photos, manage appliances and open the doors of the car between these trends we find some that directly affect Sefici:

The emergence of 5G networks, designed to connect all devices owned by a user, says "will start the real age of the internet of things."

Big Data will be presented as one of the new forms of monetization, digital transformation will force companies to change their corporate structure, as the use of big data and monetization of the data will continue to make a dent in the market.

Also, the appearance of chatbots is also a factor to take into account as customer service takes on a new meaning, according to the company Inbenta "by 2020 chatbots will replace 100% call centre agents."
11.1.5 Ecological factors.

As for the ecological factors we could say that they do not affect in a relevant way to this type of companies since all the services are rendered in a virtual or online way, which in the first instance does not affect to the ecological scope of the country.

11.1.6 Legal factors.

Due to the complexity of the use of information in the digital media use, in recent years have emerged legal aspects to take into account, here are named some:

**Organic Law 15/1999, December 13th, Personal Data Protection.** “Its purpose is to guarantee and protect, with respect to the processing of personal data, public freedoms and fundamental rights of natural persons, and especially their honor and personal and family privacy. 

**Organic Law 34/2002, July 11th, on services of the information society and electronic commerce.** "It is intended to incorporate into the Spanish legal order Directive 2000/31 / EC of the European Parliament and Council of June 8th on certain aspects of information society services, in particular electronic commerce”.

There are also legal aspects to consider as:

The **functionality** of the app must be lawful and appear in some section of the web for user’s query.

**Own rights and third parties:** The apps are composed of a number of elements such as programming libraries, databases, graphics, melodies, texts ... In order to publish them it is necessary that the company has all the necessary licenses for each of them.

**Privacy** is one of the biggest restrictions of today, companies want as much information as they can from the user and the user wants the company to have as little information as possible. So the information that can be collected by the company, is usually limited to the minimum possible, in addition the user should be able to control what information is providing.
An app is a software, so it will be necessary to write a license of use in which developers and customers are exempt from liability that may arise from the use of the application.

The user should be provided with all information about the company, either in legal conditions, in a section "about us" or "who we are" and include aspects such as the name and domain of the company, registration data in the Register Mercantil, CIF, adhesion, codes of conduct, etc.

11.2 Competitive environment analysis (Porter)

11.2.1 Rivalry between competitors.

The competing companies can be divided into three groups:

1. Incident management software with app version.
2. Mobile applications for incident management.
3. Instant messaging applications.

11.2.1.1 Incident management software with app version.

ServiceTonic: Company built around this product. It is a service request management software with two types of user: the one that receives the request and the one that processes the service. It has some difficulty in configuration, although smaller than the other software analyzed. Also the calculation of the price is simpler and more transparent. Even with this, there is always the contact of the consultant of the company with the client, its use is not completely intuitive.

Movil Gmao: Developed by the company Nueva Gestión Informática. S.L for the management of work orders. Of the products analyzed is the most complete covering all the needs of work management; For this reason is also the most complex product in both configuration, use and price.

Mobile Web Sat: Software developed by NHT Norwick aimed at companies that have a technical support service, perhaps the most complete in terms of control of personal mobile work (presence control, visibility of work done outside the office, etc.), also
expandable by Modules under its extensive portfolio of mobile applications aimed at business management.

Directed in particular to large companies, its complete functionality translates into complexity of configuration, use and prices. It has the strength to be specialized in the development of own mobility products aimed at companies (For more information Annex 1).

11.2.1.2 Mobile applications for incident management.

Lorem incidencias: Product designed by Lorem Solutions S.L. Platform for taking data on incidents through a tablet or smartphone and web control panel for processing and derivation.

UUUPSAPP: Mobile application for smartphones and tablets for incident management, allows total mobility, configurable 100% and measures and analyzes the effectiveness in companies through performance charts, etc.

Linea verde: Communication of urban incidents and damages in the urban equipment of the cities through mobile devices, environmental consultations (for citizens and companies). (For more information Annex 2).

11.2.1.3 Instant messaging applications.

Messaging applications are used by a large number of companies in the face of the need for management, but they are insufficient to cover the professional needs (Control, security...etc), but they uncover the need and generate demand. These companies can be Whatsapp, which is usually the most used for the comfort it brings to the user, however it has serious problems of security and privacy, so it is not appropriate in business use. Telegram is the second most used messaging app for providing extra sharing of documents, etc.

11.2.2 The threat of entry of new competitors.

There are few barriers to market entry, it has become clear that it is an untapped market that has unsatisfied demand, but it does not require large investments to enter
the market, in addition many of the companies already existing in the market, do not offer the incident management service only, so they can supply the initial costs with benefits of other services. In the case of Sefici cost leadership is its competitive advantage over other competitors as it reduces costs given its connection to Soluciones Cuatroochenta.

11.2.3 Buyers bargaining power.

Buyers who have a great bargaining power, especially the premium customers, who pay for services added by Sefici, so they ask for more specific and adaptable features to their business, the bigger the company has the more bargaining power it has. However freemium users who use the service for free do not have any bargaining power since they must accept the basic functionalities offered by Sefici in this version or move to the premium version.

11.2.4 Suppliers bargaining power.

Given the type of product that Sefici is, it does not depend on suppliers whose product has a great impact on the business. Soluciones Cuatroochenta provides the technological development and management of marketing campaigns by Vennova, however being the matrix company has no bargaining power as they walk together in the same direction.

It could also be considered a cloud provider, Amazon, which is the most important provision of Sefici, since it assures the security of the information of the users and must support a high volume of data traffic. Since it is an internationally renowned company, it has great bargaining power, as long as the prices and services are those and immovable, although it is true that Sefici could choose another provider if not convinced Amazon service, So that in a sense, they have freedom of choice.
12. BALANCED SCORECARD.

After analyzing Sefici, we set out objectives for each of the four perspectives of the integral scorecard (financial, clients, internal processes and resources) measured by indicators and related to the goal that the company wants to achieve and the plan of action to follow.

Table 2: Balance scorecard

<table>
<thead>
<tr>
<th>PERSPECTIVE</th>
<th>OBJECTIVES</th>
<th>INDICATORS</th>
<th>GOALS</th>
<th>ACTION PLAN</th>
</tr>
</thead>
<tbody>
<tr>
<td>FINANCIAL</td>
<td>Reduce costs.</td>
<td>Current costs / past costs * 100</td>
<td>Reduce costs by 3.5%</td>
<td>By using the SharpSpring CRM tool.</td>
</tr>
<tr>
<td></td>
<td>Reinvestment to grow.</td>
<td>% Benefit</td>
<td>90% of benefit</td>
<td>Through R &amp; D investments.</td>
</tr>
<tr>
<td></td>
<td>Growth in the market.</td>
<td>Market figure</td>
<td>Achieving market share of € 200 million.</td>
<td>MK Shares Generating Paid Customers</td>
</tr>
<tr>
<td></td>
<td>Economic profitability.</td>
<td>ROI</td>
<td>Positive</td>
<td>MK Shares Generating Paid Customers</td>
</tr>
<tr>
<td>CUSTOMERS</td>
<td>Increase conversion rate to paid customers</td>
<td>Paid Customers* 100 / total customers</td>
<td>50% payment</td>
<td>Decrease user advantages free</td>
</tr>
<tr>
<td>Loyalty paid</td>
<td>Nº of contracted users</td>
<td>Increase to 6 average users</td>
<td>Upsell (who pay more)</td>
<td></td>
</tr>
<tr>
<td>customers</td>
<td>Decrease cost of capturing 1 client</td>
<td>CPI (cost per installation)</td>
<td>Decrease to 56cent.</td>
<td>Optimizing cost of advertising campaigns.</td>
</tr>
<tr>
<td>INTERNAL</td>
<td>Manage strategic alliances</td>
<td>Nº Alliances</td>
<td>Get an alliance a year</td>
<td>Contacting with companies from which you can get beneficial</td>
</tr>
<tr>
<td>PROCESSES</td>
<td>Minimize operational problems</td>
<td>Service mistake rate.</td>
<td>Keep it at 0.</td>
<td>collaborations.</td>
</tr>
<tr>
<td>Quality</td>
<td>Nº of customer’s complaints</td>
<td>Decrease (support chat) to 50%</td>
<td>Development of an extensive and functional WIKI of complaints.</td>
<td></td>
</tr>
<tr>
<td>management.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>RESOURCES</td>
<td>Resource Optimization</td>
<td>Schedule clock control</td>
<td>Decrease them by 5%</td>
<td>Through the use of the JIRA tool.</td>
</tr>
<tr>
<td>Decrease</td>
<td>% of hours</td>
<td>Decrease the on 10%</td>
<td>By implementing the SharpSpring tool</td>
<td></td>
</tr>
<tr>
<td>commercial</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>management time</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Develop the</td>
<td>Nº partners</td>
<td>10 annually (min € 20,000)</td>
<td>Business actions (mailing / commission offers)</td>
<td></td>
</tr>
<tr>
<td>partner program.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: Own elaboration
12.1 Strategic Map.

12.2 Indicator tables.

12.2.1 Financial Perspective.

<table>
<thead>
<tr>
<th>INDICATOR SHEET “Actual costs”</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Definition, calculation method</strong></td>
</tr>
<tr>
<td><strong>Goal</strong></td>
</tr>
<tr>
<td><strong>Source</strong></td>
</tr>
<tr>
<td><strong>Frequency</strong></td>
</tr>
<tr>
<td><strong>Representation of the evolution of the indicator.</strong></td>
</tr>
<tr>
<td><strong>Responsible</strong></td>
</tr>
<tr>
<td><strong>Objective with which it is related</strong></td>
</tr>
</tbody>
</table>

*Source: Own elaboration - Actual Costs*
### INDICATOR SHEET “Reinvestment”

<table>
<thead>
<tr>
<th>Definition, calculation method</th>
<th>% of benefit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Goal</td>
<td>90% of benefit</td>
</tr>
<tr>
<td>Source</td>
<td>Sefici Tech Solutions</td>
</tr>
<tr>
<td>Frequency</td>
<td>Annual</td>
</tr>
<tr>
<td>Representation of the evolution of the indicator.</td>
<td>Bars Diagram</td>
</tr>
<tr>
<td>Responsible</td>
<td>Product Manager</td>
</tr>
<tr>
<td>Objective with which it is related</td>
<td>Reinvestment to growth</td>
</tr>
</tbody>
</table>

*Source: Own elaboration - Reinvestment*

### INDICATOR SHEET “Growth”

<table>
<thead>
<tr>
<th>Definition, calculation method</th>
<th>Market figure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Goal</td>
<td>Reach 200 millions.</td>
</tr>
<tr>
<td>Source</td>
<td>Sefici Tech Solutions</td>
</tr>
<tr>
<td>Frequency</td>
<td>Annual</td>
</tr>
<tr>
<td>Representation of the evolution of the indicator.</td>
<td>Bars Diagram</td>
</tr>
<tr>
<td>Responsible</td>
<td>Product Manager</td>
</tr>
<tr>
<td>Objective with which it is related</td>
<td>Growth in the market</td>
</tr>
</tbody>
</table>

*Source: Own elaboration - Growth*

### INDICATOR SHEET “Profitability”

<table>
<thead>
<tr>
<th>Definition, calculation method</th>
<th>ROI</th>
</tr>
</thead>
<tbody>
<tr>
<td>Goal</td>
<td>Positive</td>
</tr>
<tr>
<td>Source</td>
<td>Sefici Tech Solutions</td>
</tr>
<tr>
<td>Frequency</td>
<td>Annual</td>
</tr>
<tr>
<td>Representation of the evolution of the indicator.</td>
<td>Bars Diagram</td>
</tr>
<tr>
<td>Responsible</td>
<td>Product Manager</td>
</tr>
<tr>
<td>Objective with which it is related</td>
<td>Economic Profitability</td>
</tr>
</tbody>
</table>

*Source: Own elaboration - Profitability*
### 12.2.2 Customers perspective.

#### INDICATOR SHEET “Increase paid customers”

<table>
<thead>
<tr>
<th>Definition, calculation method</th>
<th>Paid customers*100/ total customers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Goal</td>
<td>50% payment</td>
</tr>
<tr>
<td>Source</td>
<td>Sefici Tech Solutions</td>
</tr>
<tr>
<td>Frecuency</td>
<td>Annual</td>
</tr>
<tr>
<td>Representation of the evolution of the indicator.</td>
<td>Bars Diagram</td>
</tr>
<tr>
<td>Responsible</td>
<td>Product Manager</td>
</tr>
<tr>
<td>Objective with which it is related</td>
<td>Increase conversion customer rate</td>
</tr>
</tbody>
</table>

*Source: Own elaboration - Increase paid customers*

#### INDICATOR SHEET “Contracted users”

<table>
<thead>
<tr>
<th>Definition, calculation method</th>
<th>nº contracted users</th>
</tr>
</thead>
<tbody>
<tr>
<td>Goal</td>
<td>Aumentar a 6 la media de usuarios por contrato.</td>
</tr>
<tr>
<td>Source</td>
<td>Sefici Tech Solutions</td>
</tr>
<tr>
<td>Frecuency</td>
<td>Annual</td>
</tr>
<tr>
<td>Representation of the evolution of the indicator.</td>
<td>Bars Diagram</td>
</tr>
<tr>
<td>Responsible</td>
<td>Product Manager</td>
</tr>
<tr>
<td>Objective with which it is related</td>
<td>Fidelize paid customers</td>
</tr>
</tbody>
</table>

*Source: Own elaboration - Contracted users*

#### INDICATOR SHEET “CPI”

<table>
<thead>
<tr>
<th>Definition, calculation method</th>
<th>CPI (Cost per installation)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Goal</td>
<td>Decrease to 56 cent</td>
</tr>
<tr>
<td>Source</td>
<td>Sefici Tech Solutions</td>
</tr>
<tr>
<td>Frecuency</td>
<td>Annual</td>
</tr>
<tr>
<td>Representation of the evolution of the indicator.</td>
<td>Bars Diagram</td>
</tr>
<tr>
<td>Responsible</td>
<td>Product Manager</td>
</tr>
<tr>
<td>Objective with which it is related</td>
<td>Decrease cost of capturing 1 client.</td>
</tr>
</tbody>
</table>

*Source: Own elaboration - CPI*
### INDICATOR SHEET “Service quality”

<table>
<thead>
<tr>
<th>Definition, calculation method</th>
<th>nº customer complaints</th>
</tr>
</thead>
<tbody>
<tr>
<td>Goal</td>
<td>Decrease to 50% on chat support.</td>
</tr>
<tr>
<td>Source</td>
<td>Sefici Tech Solutions</td>
</tr>
<tr>
<td>Frequency</td>
<td>Annual</td>
</tr>
<tr>
<td>Representation of the evolution of the indicator.</td>
<td>Bars Diagram</td>
</tr>
<tr>
<td>Responsible</td>
<td>Product Manager</td>
</tr>
<tr>
<td>Objective with which it is related</td>
<td>Quality management</td>
</tr>
</tbody>
</table>

*Source: Own elaboration - Service quality*

### INDICATOR SHEET “Alliances”

<table>
<thead>
<tr>
<th>Definition, calculation method</th>
<th>nº Alliances</th>
</tr>
</thead>
<tbody>
<tr>
<td>Goal</td>
<td>An alliance per year</td>
</tr>
<tr>
<td>Source</td>
<td>Sefici Tech Solutions</td>
</tr>
<tr>
<td>Frequency</td>
<td>Annual</td>
</tr>
<tr>
<td>Representation of the evolution of the indicator.</td>
<td>Bars Diagram</td>
</tr>
<tr>
<td>Responsible</td>
<td>Product Manager</td>
</tr>
<tr>
<td>Objective with which it is related</td>
<td>Manage strategic alliances</td>
</tr>
</tbody>
</table>

*Source: Own elaboration - Alliances*

### INDICATOR SHEET “Service mistake”

<table>
<thead>
<tr>
<th>Definition, calculation method</th>
<th>Service mistake rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Goal</td>
<td>Keep it in 0</td>
</tr>
<tr>
<td>Source</td>
<td>Sefici Tech Solutions</td>
</tr>
<tr>
<td>Frequency</td>
<td>Annual</td>
</tr>
<tr>
<td>Representation of the evolution of the indicator.</td>
<td>Bars Diagram</td>
</tr>
<tr>
<td>Responsible</td>
<td>Product Manager</td>
</tr>
<tr>
<td>Objective with which it is related</td>
<td>Minimize operational problems</td>
</tr>
</tbody>
</table>

*Source: Own elaboration - Service mistakes*
## 12.2.2 Resource perspective.

### INDICATOR SHEET “Partners haunt”

<table>
<thead>
<tr>
<th>Definition, calculation method</th>
<th>Nº Partners</th>
</tr>
</thead>
<tbody>
<tr>
<td>Goal</td>
<td>10 annually or 20.000€ facturation</td>
</tr>
<tr>
<td>Source</td>
<td>Sefici Tech Solutions</td>
</tr>
<tr>
<td>Frequency</td>
<td>Annual</td>
</tr>
<tr>
<td>Representation of the evolution of the indicator.</td>
<td>Bars Diagram</td>
</tr>
<tr>
<td>Responsible</td>
<td>Product Manager</td>
</tr>
<tr>
<td>Objective with which it is related</td>
<td>Develop the partners program</td>
</tr>
</tbody>
</table>

*Source: Own elaboration - Partner haunt*

### INDICATOR SHEET “Programming time control”

<table>
<thead>
<tr>
<th>Definition, calculation method</th>
<th>Nº programming hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>Goal</td>
<td>Decrease it on 5%</td>
</tr>
<tr>
<td>Source</td>
<td>Sefici Tech Solutions</td>
</tr>
<tr>
<td>Frequency</td>
<td>Annual</td>
</tr>
<tr>
<td>Representation of the evolution of the indicator.</td>
<td>Bars Diagram</td>
</tr>
<tr>
<td>Responsible</td>
<td>Product Manager</td>
</tr>
<tr>
<td>Objective with which it is related</td>
<td>Optimization Resource</td>
</tr>
</tbody>
</table>

*Source: Own elaboration - Programming time control*

### INDICATOR SHEET “Commercial time control”

<table>
<thead>
<tr>
<th>Definition, calculation method</th>
<th>Nº commercial hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>Goal</td>
<td>Decrease them on 10%</td>
</tr>
<tr>
<td>Source</td>
<td>Sefici Tech Solutions</td>
</tr>
<tr>
<td>Frequency</td>
<td>Annual</td>
</tr>
<tr>
<td>Representation of the evolution of the indicator.</td>
<td>Bars Diagram</td>
</tr>
<tr>
<td>Responsible</td>
<td>Product Manager</td>
</tr>
<tr>
<td>Objective with which it is related</td>
<td>Decrease comercial management time</td>
</tr>
</tbody>
</table>

*Source: Own elaboration - Commercial time control*
13. CONCLUSIONS.

Based on the information analyzed throughout this document Sefici has good strategies to keep growing in the market and be clearly positioned before the competition, also has very clear objectives of where improvements should be made.

To conclude we can say that Sefici has a good financial bases to still growing and possesses great qualities so that its benefits continue to grow and the company remains profitable. The control of the inefficiencies in terms of over worked hours in some processes causes an increase in the costs of Sefici, which must be controlled since the strategy of Sefici is the leadership in costs and thanks to them enjoys a good position in the market. As for the human resources perspective, the fact is that it is a young company, run by people who continue to implement new forms of management, it is a rather flat structure that allows employees greater flexibility and freedom of decision has a good network of partners And aspirations to continue to get new partners, this will impact on higher sales of Sefici.

As a recommendation, greater investments in marketing could be made so that Sefici can position itself as a leader in the market, although it is already working on it, since a few months ago the marketing director joined the team, which, although little by little Is getting more visibility to the company. Through Cost Control Sefici will continue to enjoy its leadership position in cost versus competition as well as the improvement in the web assistance chat to customers and their possible complaints, which can save a lot of time of attention to the user and Be dedicated to increase the network of partners, this can do through presentations in hot spots where there is a target audience that may be interested in collaborating with the company in increasing sales, these points can be entrepreneurial or investment fairs.

I would like to refer the provision and support of the company with this project, since I have been provided much of the information to make this document as real and useful as possible for them to use it.
## 14. ANNEXED.

### 14.4 Annexed 1: Competitors incident management.

<table>
<thead>
<tr>
<th>PRODUCT</th>
<th>SERVICETONIC</th>
<th>MOVIL GMAO</th>
<th>MOBILE WEB SAT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Company</td>
<td>ServiceTonic S.L</td>
<td>Nueva Gestión Informática S.L</td>
<td>NHT Norwick</td>
</tr>
<tr>
<td>Location</td>
<td>Barcelona</td>
<td>Oviedo</td>
<td>Vizcaya</td>
</tr>
<tr>
<td>Constitution year</td>
<td>2009</td>
<td>1985</td>
<td>1998</td>
</tr>
<tr>
<td>Description</td>
<td>Software installed in configurable server with different modules for the management of request of services, assets, etc. With configurable app.</td>
<td>Management of Work Orders (Preventive and corrective) directed to conventional maintenance companies, with mobile app for technicians and web portal for final client.</td>
<td>Management of Work Orders (Preventive Management of incidents and parts and presence control (integrated work parts). Customizable reports. Directed to large companies that have a technical assistance service.</td>
</tr>
<tr>
<td>Strengths</td>
<td>• International: language detection and time and format preferences. • Configurable without programming knowledge. • Integration with external systems. • Partner network in 14 countries.</td>
<td>• Complete management of work orders: consumption of material, hours worked, etc. • Project supported by the Avanza Plan2. • Highly adapted to cover all the needs of maintenance companies. • Integration with any ERP or management system. • Distribution by consultants and training in maintenance management.</td>
<td>• Complete product that covers the integral needs of technical assistance for large companies. • Expandable by modules with greater functionalities. • Partnership with large mobile operators and companies in the sector. • Possibility of own financing. • Wide portfolio of mobile solutions aimed at companies.</td>
</tr>
<tr>
<td>Weakness</td>
<td>• High price (per agent € 17 / month. • Complexity of initial configuration. • Lack of adaptability to user characteristics.</td>
<td>• It is necessary to have implemented ERP or management system with which mobile data are integrated. • Complexity of implementation of product and use. • Vendor dependency for configuration. • Low probability of use in SMEs.</td>
<td>• It is necessary to have implemented ERP or management system with which mobile data are integrated. • Complexity of implementation of product and use. • Vendor dependency for configuration. • Low probability of use in SMEs.</td>
</tr>
<tr>
<td>Customers</td>
<td>n.d</td>
<td>n.d</td>
<td>Cruz Roja Española, Artesa, Cafés Baqué</td>
</tr>
</tbody>
</table>

Source: Own elaboration
## 14.2 Annexed 2: Competitors incident management app version.

<table>
<thead>
<tr>
<th>PRODUCT</th>
<th>LOREM INCIDENCIAS</th>
<th>UUUPSAPP</th>
<th>LINEA VERDE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Company</td>
<td>Lorem Solutions</td>
<td>Podarcis S.L</td>
<td>Green Tal SA</td>
</tr>
<tr>
<td>Location</td>
<td>Navarra, Madrid y Barcelona</td>
<td>Palma de Mallorca</td>
<td>Madrid</td>
</tr>
<tr>
<td>Constitution year</td>
<td>2009</td>
<td>2006</td>
<td>2000</td>
</tr>
<tr>
<td>Description</td>
<td>Incident reporting system and (or) maintenance actions from a mobile device, with control panel to manage and derive incidents and statistical module for obtaining data, directed to the sectors of construction and works, insurance (accident parts And expertise), maintenance, industry and gardening.</td>
<td>Management of incidents that can happen in a company, community of neighbours, sports centres, etc. Configurable 100%. Allows total mobility, measures and analyzes the effectiveness of companies through performance charts, among others.</td>
<td>Communication of urban incidents through mobile devices, environmental consultations (for citizens and companies).</td>
</tr>
<tr>
<td>Strengths</td>
<td>• Application of basic functionality suitable for any type of company. • Company specializing in mobile app development. • Publicity generated by the company in mass media and specialized. • Experience in the development of apps for incident management</td>
<td>• Controls internal processes. • It does not require a link ERP. • Greater price adjustment.</td>
<td>• Direct and simple use of the application. • Configurable by the client (City Hall). • Leader in your market. • Support in the promotion for its use by the citizens. • Portal Green Line personalized for each client.</td>
</tr>
<tr>
<td>Weakness</td>
<td>• It has no survey configuration. • Integration with Dropbox. • Typeform • Geolocation and advanced roles.</td>
<td>• Its implementation is not agile and autonomous. • Lack of free version. • The features are very limited.</td>
<td>• Product not applicable to companies or other organizations other than municipalities.</td>
</tr>
<tr>
<td>Customers</td>
<td>Kukutxumusu, Universidad de Navarra, Ayto Pamplona.</td>
<td>n.d</td>
<td>n.d</td>
</tr>
</tbody>
</table>

*Source: Own elaboration*
15. REFERENCES.


Gobierno de España, La moncloa, (2017). Economía e I+D+I. Available at: <http://www.lamoncloa.gob.es/espana/eh15/economia/Paginas/index.aspx>
