



# MANAGEMENT REPORTING: STRATEGIC PLAN REVIEW



# INTRODUCTION

It's the end of the year, and your organization is preparing to launch into the year ahead at full speed. You're ready to put your best foot forward and make this year the best one yet, but how does all this fit into your strategic plan?

- **Has your organizational structure evolved in the last year in a way that your strategic plan didn't account for?**
- **Has your target market shifted and you are in the process of rebranding?**
- **Did your revenue skyrocket far past what you expected?**
- **Did you fall below your targets due to factors outside of your control?**
- **Has your strategic framework changed entirely?**

It is likely that your organization has shifted in one way or another in the past year, maybe in a way you did not anticipate. If this is the case, taking stock of your strategy annually is the perfect time to address these changes. If your strategic plan does not align with the actual performance or direction of your organization, it is going to be that much more challenging for you to achieve your goals and ultimately achieve success at a high level.

For years, ClearPoint has helped organizations manage their strategic plans efficiently and effectively, and we have seen firsthand the negative impact a misaligned strategic plan can have on an organization. Entering a new year offers a fresh start of sorts, so take advantage of it. Adjust your strategic plan if it needs adjusting; identify how these adjustments will impact your organization; and finally, effectively communicate these adjustments to the rest of your division, department or team. If everyone is on the same page and working toward a common goal, it is much more likely that your organization will achieve success as a whole.



At the end of each section we've included a checklist to help your organization account for each step in the strategic plan review. There is also a quick reference guide with all of the templates and checklists on the last few pages.

Throughout each chapter you will find management reporting best practices in an orange box.



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# CHAPTER 1: STRATEGIC PLAN REVIEW AND REFRESH

When your organization is preparing to launch into a new year, evaluating your overall strategy should be the first call to action. This not only means a full-on review of your big picture strategy, including your mission, vision, and values, but also a deep dive into the more granular aspects of your plan, including objectives, measures, and initiatives that you may have established when you initially constructed your strategic plan. The annual rollover is the perfect time to focus on this process. If you put the time and energy into reviewing your strategy now, it will save you and the rest of your organization significant time, energy, and resources in the long run.

## Step 1: Review The Big Picture

Feeling overwhelmed? You're not alone, but a strategy review doesn't have to be as challenging as you might think. Our recommendation? Start big! Ask, "Is our big picture strategy still valid?" In theory, this should be the easy part. It is a yes or no question that shouldn't require a whole lot of energy to answer, and nine times out of ten, the answer will be yes.

Let's say you're taking a look at the five-year strategic plan you began to implement over the past year. Begin by evaluating your mission, otherwise known as *why you exist as an organization*. Has your mission evolved in any way over the past year? It's possible that it has, but more often than not your mission will remain constant. Every aspect of your strategic plan should ultimately tie back to your overarching mission, and if some part of your mission has shifted, it is important that this change is reflected in your strategic plan. For example, if you are a private elementary school looking to expand to a high school, this is a good time to reexamine your mission.

Next, look at your organization's vision. This aspect of your high-level strategy paints a picture of where you want to be in the future, or, for this example, where you want to be five years down the line. To keep your strategy on track, make sure your vision is feasible, based on ambitious but achievable targets that will inspire and energize individuals at all levels of the organization. If you are a healthcare organization, your vision could be disrupted by a major breakthrough in science or technology.

Finally, address your values. What do you stand for as an organization? Has this changed in the past year? The answer is often no, but if your values have indeed shifted, be sure that this shift is captured in your strategic plan for the years to come. Sometimes we see a shift in values as a result of some crisis that the organization or industry has gone through, like a recognition of new global manufacturing standards (fair pay, child labor, etc.).

### **Where are you in your current strategic plan?**

Where you are in your current strategic plan may impact how you adjust it at the annual rollover. If you are at year two of a five-year strategic plan, your process should be different than if you are entering year five of a five-year plan. If you are at year two, you are still in the early stages, so making tweaks and changes is to be expected. If you are entering into year five, tweaks and changes should be less significant, although they may still be present. If you are in the final stages of your plan but have not updated it for quite some time, it is likely that some of your strategic elements will need to be revised or removed, depending on how you are performing now versus how you had expected to perform. At this point it is possible that you may even need to add new objectives, measures, or initiatives that you had not considered initially, but now feel are important to track and report on. Nevertheless, at these late stages you will likely be spending less time tweaking details for the year ahead, and more time preparing to implement a completely new strategic plan once you have completed that fifth year.

## FACTORS THAT AFFECT A STRATEGIC PLAN

If you need to make drastic changes to your plan, it could be because of factors within or outside of your organization. Internal factors that could affect your plan include organizational restructuring such as mergers and acquisitions, or the unexpected success or failure of a new product or process.

We have also seen external factors significantly affect strategic plans. Some of these factors include:

1. **Economic**—such as a recession.
2. **Environmental**—such as a natural disaster.
3. **Competitive**—such as a competitor releasing a revolutionary new product.
4. **Political**—such as the government taking over student lending.
5. **Technological**—such as a revolutionary breakthrough in medical technology.

Of course this all depends on the purpose of your organization, but more often than not these are the five main areas that could make an impact on your high-level strategy.

**Activity: Use this template to review your Vision, Mission, and Values**

Elements to update	Current state	How far along are you in your strategic plan?	Factors Affecting affecting your strategy	Changes
VISION	Still Applies	2 out of 5 years	None at this level	None
MISSION	Still Applies	2 out of 5 years	None at this level	None
VALUES	Still Applies	2 out of 5 years	Several new competitors	More emphasis on customer service

**Checklist**

- Review mission.
- Review vision.
- Review values.
- Review internal and external factors.



## Step 2: Review Details Of The Plan Itself

Once you have reviewed your big picture strategy, it's time to get down to the details. While evaluating your big picture strategy is important, it doesn't mean a whole lot if you don't address the actual components of your strategic plan (your objectives, measures, and initiatives). Looking at these details and evaluating how things have evolved since the initial creation of your strategic plan will help ensure that each of the metrics included in your plan are not only realistic, but also relevant.

### Objectives

Start with your objectives. At the annual rollover you should be asking, "Do our objectives still capture our high-level goals as an organization?" The changes that you make to your objectives could be as small as a word change (for example, changing the word "customer" to "client"), or they could be as drastic as removing an entire objective and replacing it with one focused on a completely different area of your organization. Rather than relying on your gut, force yourself to look across various factors and components of your organizational model to determine where objectives need to be adjusted.

If you need inspiration, many organizations use Porter's Five Forces analysis as a starting point. In a nutshell, this analysis draws on the five competitive forces that shape every industry, and ultimately determine the strengths and weaknesses of your organization. The five forces to consider when evaluating your strategy at the annual rollover include competition within your industry, the threat of new entrants to your industry, the power of suppliers, the power of your customers, and finally the threat of substitutions to be used in place of your products or services. If you are interested in reading more about Porter's Five Forces, here's an [article](#) to get you started. When looking at these five forces, consider what has changed over the past year in those areas that relate directly to your high-level goals. Do your objectives still appropriately address each of the forces in a realistic and relevant way? Is everything captured? Are you overlooking any aspect of the five areas? Looking ahead to the upcoming year,

do your objectives still align with your high-level goals in the same way as last year?

For each objective, the outcome should be one of four options. The first is that you leave it alone. If the objective is still valid and appropriately reflects your goals, there is no need to alter it. The second and third options would be to either tweak the objective in a minor way or to alter it majorly, depending on how much has shifted within your organization and how much you had accounted for that shift in your original strategy. The final option would be to delete the objective entirely if you no longer think it is relevant or necessary to track. While it may take some time and effort to come to an agreement as an organization regarding which objectives need to be changed and which don't, ensuring that your objectives appropriately reflect your high-level goals will make it easier to manage and track your strategy moving forward into the new year.

**Activity: Use this checklist to review the factors influencing your strategy refresh and to track what changes you need to make to your objectives. List your objectives in the left column and, together with your leadership team, validate the objective or suggest changes. Once finished, review and make final adjustments to your strategy.**

Five Forces	Changes that could impact your current strategy
Competition	
New Entrants	
Suppliers	
Customers	
Substitutions	

Objectives	Validate	Owner	Changes
Increase Shareholder Value	✓	AF	
Grow Number of Locations	✗	AF	We are changing ownership of this objective as we've hired new employees specific to this goal.
High Employee Ownership	✓	AH	

## Measures and Targets

Next, focus on your measures. Just like your objectives, use the annual rollover to evaluate if the measures you had in place the previous year still make sense going forward based on where your organization is today. Given that you may have changed some objectives or goals entirely, there will be the opportunity to adjust your measures accordingly.

We have seen many changes during the adjustment process for measures. The first is that you leave the measure alone if no changes need to be made. The second is that you alter the target of your measure, either making it higher or lower depending on your performance in the last year (see call-out box). The third option is to change the formula for your measure, if you decide to start measuring in a different way altogether. The last option is to remove the measure if you come to the conclusion that it is no longer relevant or necessary to track. Typically these changes will be made by the leadership responsible for your organization's strategy, and we suggest that a half-day meeting at minimum be dedicated to this process. If you'd like to take this a step further—and many organizations do—scheduling an off-site meeting can be beneficial as well.

The measure change template below is a great place to start when assessing your measures.

## SETTING TARGETS

When building a five-year strategic plan, for example, you will want to set targets for your measures that are at the plan deadline. Then you should break down the five-year target into a target that works for this year, and every year within the rest of the five-year plan. This article will help you with some tips to best build your targets.

<https://www.clearpointstrategy.com/how-to-set-kpi-targets/>

So why does this matter? This concept is important to consider at the annual rollover when you are doing your strategic plan review as you will need to evaluate whether or not your assumptions for reaching that five-year mark have changed or not. Ultimately, this will affect how you set your targets. If at the initial construction of the strategic plan you had set an ambitious target for one of your financial measures and you are now facing an economic recession, for example, your targets will undoubtedly need to be lowered.

**Activity:** Similar to your objectives, track your changes, including any changes to your targets, that you need to make for your measures. Check with the measure owners and leadership team to make sure everyone is on the same page.

Measures	Validate	Owner	Changes
Revenue	✓	AF	
# Customer Complaints	X	JW	Break this down into severity of complaint
Average Wage	X	AH	Show overall for company and by level in the organization

## Initiatives

Now that you have addressed both your objectives and your measures, it is time to focus on your initiatives. What will your new strategic initiatives be in the upcoming year? Which initiatives can you retire, and which will you continue to track and report on after the annual refresh? When we talk about initiatives or strategic projects, we are talking about the long-term projects that your organization is tracking. They typically have a business plan, budget, and other resources allocated to them. These key projects will inevitably change in some way from year to year. One key piece of advice is that if you can't tie an initiative directly back to one of your strategic objectives, you probably do not need to be tracking that initiative in your overall plan. At ClearPoint, we are advocates for strategic alignment, and have seen firsthand how much more successful organizations are in the long run when each of their elements are fully integrated into their strategic plans and are linked to organizational goals.

It is also important to remember that your initiatives vary slightly from other strategic elements due to the influence of one unique element: your budget. If you no longer have the budget you did in the previous year, or you have a higher budget now than you did before, it could influence your ability to execute more or fewer projects over time.

Similar to your other strategic elements, there are four possible options when reviewing your initiatives at the annual rollover. The first option is to leave an initiative alone, which is likely the most common outcome of the four. If the initiative is good as it is and you wish to continue tracking and reporting on it in the upcoming year, leave it.

The second option when assessing your initiatives is that your project goals need to be readjusted. This is like adjusting your business plan. If it is a capital project, maybe some engineering design or a different solution is proposed. Maybe during the first phase of the project, you realize you can accomplish different goals or the goals of your strategy have changed and thus this initiative needs to change. The third option is that details of your initiative such as your budget or due dates need to be shifted, usually as a result of changes in performance that you did not anticipate due to either internal or external factors that may have arisen unexpectedly. The fourth option is that you decide to stop or start a new project, which would require you to either add in a new initiative to your plan or remove one entirely.

**Activity: Time to update your initiatives! Use this template to record your changes.**

Initiatives	Validate	Owner	Changes
Create new employee training	X	AH	Completed and new training program is in place, removing from strategic plan
Create new strategy resources for customers	✓	AF	
Increase social media presence	✓	AH	

### Step 3: Improve Your Reports

Reporting is a critical aspect of strategy management. Most organizations pull together monthly, quarterly, and annual reports for different audiences (divisions, executives, boards/councils). The annual strategy refresh is the perfect time to make sure your reports are meeting the needs of each audience. You will need to update the reports with any new content from the exercises above. Also, check with report recipients to see what is being used and ignored in these reports. You can revise the entire reporting process.

First, fix the little things. Take the time to go through your reports and update the goals, measures, and initiatives. Update any targets, ownership, and other items that changed earlier in the process. If you are using ClearPoint or another reporting software, this should be pretty easy. Your report will update itself, so you won't need to worry about fixing your reports if you have changed your goals, measures, and initiatives in ClearPoint.

Now, don't forget the opportunity to improve your overall reporting. The best place to get started with this is to look at your organization's reporting calendar. Ask a few questions:

- How frequently are you meeting on strategy? Quarterly? Monthly?
- Is this enough? Too often?
- Are the meetings effective?
- How much time do you spend preparing for each meeting?
- Who is doing the preparation, and what does this process look like?

**Then look at the contents of the reports and ask a few more questions:**

- Is all the information that you prepare used in the meetings?
- Are people reviewing the detailed information or just the summary information?
- What types of questions do you get after each report and meeting? Can that information go into the reports?
- What about the general report structure? Does it look like 1989 or 2017? Sometimes the way a report is presented could make a difference.

#### IS YOUR PROCESS AUTOMATED?

If there is a more efficient or automated way of carrying out this process, and you can somehow automatically generate your reports, you should be taking advantage of this. ClearPoint is not the only solution, but we do encourage you to take advantage of some sort of management reporting software to help you get the job done more effectively and efficiently. If you're interested in talking with one of our experts to see if ClearPoint is the right option to automate your process, [request a demo](#).



When looking at the reporting process you should also consider how it is documented, and whether or not it is run with fidelity. Be smart, and ensure you always have people to act as backups who can get the job done if one person leaves or is sick. If you are relying on one or two people to manage and carry out the entire reporting process, you will have nobody on deck to pick up the pieces when necessary, which will ultimately lead to your entire process falling apart. To avoid this, make sure your organization is set up in a way that, if for some reason you lost your reporting team, your organization could function without skipping a beat when it comes to executing your strategy.



## Need to keep your team on the road to reporting success?

Download our template to help you build your company's monthly strategic reporting policy.

[Get The Guide](#)

### Step 4: Communicate Changes To Your Organization

You've reviewed your strategy and updated your strategic plan. Now what? Time to create that organizational buy-in! Just because you and your team accept and understand your new strategic plan doesn't mean the rest of your organization or division has fully adopted these changes. Once you have completed the plan review the next step is to effectively communicate changes to the rest of your organization. After all, ensuring that the strategic plan is adopted across your organization will bring you one step closer to staying on track with your strategy, and will ultimately help you to achieve your high-level

goals. There are a few ways you can effectively communicate these strategic changes, and the best way to do so will vary depending on your organization.

One of our clients, a large financial organization based out of New York, learned that communication is the key to success when it comes to implementing a new strategic planning process. They introduced a new strategic plan and the Balanced Scorecard as the framework to manage it. As an international financial institution that serves over 100,000 members throughout the world, they knew they needed to ensure organizational alignment to reach their strategic goals. The first step? Gain support for the new strategic plan across all levels of the organization. To do this, the organization effectively communicated its new plan and Balanced Scorecard to all staff using videos, progress reports, brochures, posters, and its internal corporate social network. On top of all that, key stakeholders were provided with discussion guides so they could continue the conversation. The strategy team distributed journals to every employee that included a printed copy of the organization's corporate strategy map on the inside of the cover. And when it came time to celebrate the rollout of the Balanced Scorecard, an image of their strategy map was imprinted onto a cake. These integrated efforts ensured that strategy was recognized as part of the organization's core culture. Communication is often the most overlooked aspect of strategy, but as we have seen firsthand from this organization's success, it is absolutely crucial for creating buy-in and momentum when it comes to executing a new strategic plan.

#### Checklist

- Review objectives.
- Review measures & targets.
- Review initiatives.
- Update reports.
- Communicate changes.

# CHAPTER 2: MANAGING YOUR LAST-YEAR AND FUTURE-YEAR STRATEGIC PLANS SIMULTANEOUSLY

Now that you have decided on the changes you will be making to your strategy for the upcoming year, you need to determine how to handle the current strategy you have in place for the remainder of your fiscal year. What is the best way to manage and track these two plans simultaneously? What if you plan on completely changing your measures in the new year? Should you still be tracking and reporting on your current measures until you switch over to the new plan? Unfortunately the answer isn't a simple yes or no. While we cannot give you a concrete answer, we can give you tips and tricks and best practices based on what we've seen from the way our current customers manage the annual rollover.

One of our clients, a large western utility, has their process down to a T. As a large organization with several divisions and over 10,000 employees, it is crucial to them that their strategic planning and management process does not fall by the wayside during their annual rollover. To ensure this is not the case, they have developed an organized and streamlined strategic review process that allows them to effectively report on the last period before the rollover, while also maintaining their commitment to strategy improvement for the upcoming year. Enter the Process Reengineering Team (PRT). The PRT is not only responsible for heading the entire ClearPoint process, they also act as the liaison between all other departments in regards to strategic changes that occur at the annual rollover. To manage this process in a streamlined and effective manner, the PRT created a uniform template that is distributed to each of the departments toward the end of the calendar year to see what changes in their strategy need to be made where, while simultaneously maintaining focus on their current year's measures.

The template, which is essentially a simple Excel file, asks individuals from each department to fill in various elements such as name, description, what the measure is compared to, what it's evaluated against, whether or not it should be entered into ClearPoint, etc. Some metrics end up getting retired, some get tweaked, and some will simply get used again. Even the metrics that go away, however, will still be archived within ClearPoint so they can be brought back and measured if need be. Once they have determined how their metrics will be changed for the upcoming year, they adjust their reports and briefing books. By addressing each area of their strategic plan in an organized and straightforward manner, they are able to manage both their current year strategy as well as their upcoming year strategic plan simultaneously, with little to no delay or decline in performance or efficiency.

**Example Template:**

**FINANCE & RISK - OPERATIONAL METRICS**

5. 2016 Metric Name: Payroll Accuracy (%)

2016 Metric Description: Intrus. Errors divided by Total Payments.

Note: Excludes all adjustments to Straight Time and Overtime for the preceding period; pensioners are not included in calculation.

Evaluation: Higher is Better

Reporting Frequency: Monthly

Chart Reporting Frequency: Monthly Actual vs. Targets

Data Source: Quickbooks payroll tracker

6. 2016 Metric Name: Enterprise Risk Mitigations Complete (%)

2016 Metric Description: Metric measures the number of risk mitigations completed each month for all Placement Risk currently tracked in CCTS.

**RAG Rules**

RAG	Compared To	Calc
Green	>= Target	N/A
Amber	>= Target	=27.5
Red	< Target	=27.5
Green	>= YTD Target	N/A
Amber	>= YTD Target	=27.5
Red	< YTD Target	=27.5
Green	>= EOY Target	N/A
Amber	>= EOY Target	=27.5
Red	< EOY Target	=27.5

**Current Targets/Actual Format** % - 2 decimals

Period	Target	YTD Target	EOY Target	2Yr Target
Jan	98.00%	98.00%	98.00%	98.20%
Feb	98.00%	98.00%	98.00%	98.20%
Mar	98.00%	98.00%	98.00%	98.20%
Apr	98.00%	98.00%	98.00%	98.20%
May	98.00%	98.00%	98.00%	98.20%
Jun	98.00%	98.00%	98.00%	98.20%
Jul	98.00%	98.00%	98.00%	98.20%
Aug	98.00%	98.00%	98.00%	98.20%
Sep	98.00%	98.00%	98.00%	98.20%
Oct	98.00%	98.00%	98.00%	98.20%
Nov	98.00%	98.00%	98.00%	98.20%
Dec	98.00%	98.00%	98.00%	98.20%

**RAG Rules**

RAG	Compared To	Calc
Green	>= Target	N/A

**Current Targets/Actual Format** % - 2 decimals

Period	Target	YTD Target	EOY Target	2Yr Target
Jan	0.00%	73.83%	83.00%	89.00%

While this level of sophistication in regard to managing a current-year and future-year strategic plan simultaneously is impressive for any organization, it is especially impressive for such a large organization with so many moving parts. Even if your organization is significantly smaller, we suggest you approach your strategy review at the annual rollover in a similar manner.

So this utility reports on everything in the previous year plan through the last month of that year, even if the plan is changing. Following that lead will work well for most organizations with a stable business model because the metrics will typically be stable, even if the targets change from one year to the next.

On the other hand, if your strategy is changing or you have divested of certain operations or decided not to proceed in some areas, you may need to stop reporting on that part of your strategy even before the end of the year. The important thing is to implement an organized and well-thought out rollover process that allows you to effectively assess which parts of your strategy need to be altered for next year's plan.

# CHAPTER 3: WHAT TO DO IF YOU ARE ABANDONING YOUR CURRENT STRATEGIC FRAMEWORK ENTIRELY

Knowing how to manage your current- and future-year strategic plans simultaneously is important, but what if your organization is ditching your current strategic framework altogether? We've seen this happen on numerous occasions, and often this can create chaos and distress across an organization, ultimately leading to a decline in performance. We're going to let you in on a secret, however, that we've learned over the years: It doesn't have to be this way! Just because you decide to throw out your entire current management reporting format and replace it with another does not mean your strategy as a whole needs to suffer. Let's say, for example, that your organization has been using the Balanced Scorecard format for the past several years, and at the annual rollover you have a new CEO or director who plans to launch an entirely new strategy management framework in the upcoming year. If you are using ClearPoint or some other management reporting software, this does not mean that the software has to be thrown out along with the scorecard or discarded framework.

Typically, if your organization is maintaining a relatively steady trajectory, you are going to continue to look at a common set of metrics surrounding your high-level goals. Oftentimes those high-level goals relate to the following four areas: financial, customer, internal processes, and people. You will still need some way to track these metrics in an effective and streamlined manner, you just need a different framework for doing so. Your data will still come from multiple places, and you will still have multiple "owners" throughout the organization.

One of the many great things about ClearPoint is that we make it easy for you to relabel and restructure, as well as customize and rebrand to meet your new management reporting process or framework. We work with you to realign to your new framework and help you come up with a streamlined and effective approach to rearranging your elements within our tool. Abandoning your current strategic framework will inevitably require a good amount of time and effort on your part to assure continued alignment across your organization, but this process can be made significantly easier by not wasting any time on implementing and training your users in an entirely new tool.

## Conclusion

We know that the annual rollover process can be a challenge for many aspects of an organization. Our hope, however, is that by using this guide, your strategic review at the end of each fiscal year will not only be streamlined and straightforward, but also thorough and effective. We also want you to keep in mind that we are always here to act as your partner throughout this process. Whether you need someone to bounce ideas off of or you are looking for more hands-on guidance, we are here to support you. Our years of experience have given us the benefit of seeing what works and what doesn't. Our clients have conducted thousands of strategic plan reviews over the years, and we've partnered with them to keep them focused on their strategy. Don't be intimidated by the strategic plan review process. We encourage you to embrace it, and turn to us for help along the way! Please reach out to us at [support@clearpointstrategy.com](mailto:support@clearpointstrategy.com) with any questions, comments, or concerns. Thank you for choosing ClearPoint and best of luck on your strategy execution journey!

**REVIEW VISION, MISSION, AND VALUES:**

Elements to update	Current state	How far along are you in your strategic plan?	Factors affecting your strategy	Changes

**EVALUATE INTERNAL AND EXTERNAL FACTORS:**

Five Forces	Changes that could impact your current strategy
Competition	
New Entrants	
Suppliers	
Customers	
Substitutions	



**REVIEW OBJECTIVES:**

Objectives	Validate	Owner	Changes

**REVIEW MEASURES:**

Measures	Validate	Owner	Changes

**REVIEW INITIATIVES:**

Initiatives	Validate	Owner	Changes

**UPDATE REPORTS:**

- Update reporting calendar.
- Remove unneeded information from reports.
- Add new information to reports.
- Update structure of reports.

**COMMUNICATE CHANGES ACROSS THE ORGANIZATION:**

- Decide what changes need to be communicated to whom.
- Create communication materials.
- Distribute materials and make yourself available to answer questions.