
Exercise 11-1. Your quarterly context plan.

Directions: Complete the following steps to make sure that your value is always visible in the right place at the right time. Completing this exercise will help ensure you have the right data for each audience and wrap up step 9 of the financial value process: plan quarterly context. If you prefer not to write in this book, go to the companion Website (www.astd.org/astd/publications) to download a PowerPoint file for this exercise.

1. Note today's date.
2. Write the name or a brief description of the intervention you will be communicating about.
3. Fill in the names of the months that begin and end each fiscal quarter under the headings first quarter, second quarter, third quarter, and fourth quarter.
4. For your fiscal lifecycle, fill in the audience names and the dates in each quarter by which you need to have communicated your value as it relates to the core business and the new initiatives that have been launched and managed within each fiscal quarter.
5. For your new product introduction lifecycle, fill in the audience names and the dates in each quarter by which you need to have communicated your value as it relates to improving new product introductions.
6. For your seasonal lifecycle, fill in the audience names and the dates in each quarter by which you need to have communicated your value as it relates to improving or managing seasonal fluctuations in revenue, costs, or cash flow.

Step 9: Quarterly Context Plan

① **Today's Date:** _____

② **Your Intervention:** _____

③ **1st Quarter:** _____ **2nd Quarter:** _____ **3rd Quarter:** _____ **4th Quarter:** _____

④ **Fiscal:** _____ **Audience and Communication Dates**

1st/Ops: _____	_____	_____	_____	_____
Mid: _____	_____	_____	_____	_____
Senior: _____	_____	_____	_____	_____

⑤ **Product:** _____ **Audience and Communication Dates**

1st/Ops: _____	_____	_____	_____	_____
Mid: _____	_____	_____	_____	_____
Senior: _____	_____	_____	_____	_____

⑥ **Seasonal:** _____ **Audience and Communication Dates**

1st/Ops: _____	_____	_____	_____	_____
Mid: _____	_____	_____	_____	_____
Senior: _____	_____	_____	_____	_____