

### Exercise 13-1. Your value statements.

*Directions:* Completing this exercise completes your work on step 11 of the financial value process: create value statements. If you prefer not to write in this book, go to the companion Website ([www.astd.org/astd/publications](http://www.astd.org/astd/publications)) to download a PowerPoint file for this exercise.

1. Write the name of your intervention in the first line labeled "intervention."
2. Date your value statements on the second line.
3. For your performance value segment, fill in the period of time, the intervention, your direction verb, performance measure, and amount of change as is meaningful for each of your audiences. Go back to your financial imperatives scorecard exercise from chapter 9 to get the information you need.
4. For your financial value segment, fill in your direction verb, financial measure, and amount of change. Once again, your financial imperatives scorecard will be very helpful to you, as will other information you have gathered from your business intelligence research on financial statements or on other details about your organization.
5. For your relevant context, make sure you have your quarterly context plan available. Fill in the name of the intervention and then create your relevant benefit or impact based on the fiscal, product, or seasonal lifecycles of your organization and what is urgent and important for your audience to pay attention to today.
6. For your goal segment, write down what you want from each audience and why that is important using estimates, forecasts, or any other data you may have. Fill in the period of time in which you would like your audience to take action, and then write down the next step you want that audience to take.

INTERVENTION:				
DATE:				
		SENIOR	MID	1ST/OPS
	I	II	III	IV
				V
1	PERFORMANCE VALUE			
2	Period of Time			
3	Intervention			
4	Direction			
5	Performance Measure			
6	Amount of Change			

INTERVENTION:					
DATE:					
		SENIOR	MID	1ST/OPS	INDIVIDUAL
	I	II	III	IV	V
7	FINANCIAL VALUE (Thereby)				
8	Direction				
9	Financial Measure(s)				
10	Amount of Change				
11	RELEVANT CONTEXT (Which Means)				
12	Intervention				
13	Relevant Benefit or Impact				
14	YOUR GOAL				
15	What You Want				
16	Why				
17	Period of Time				
18	Next Step You Want Them to Take				