



20th Anniversary
GEO | AMSTERDAM | 2019
10-12 APRIL, GRAND HOTEL KRASNAPOLSKY

Seven Simple Techniques to Build Share Ownership at Your Company

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So let us ask you...

- Does your plan encourage employee share ownership?
 - Yes, absolutely
 - Somewhat
 - No

So let us ask you...

- Is participation in line with expectations?
 - Yes, it's where we'd like it to be
 - No, it's lower than we'd like
 - We don't know what our ideal participation rate is

So let us ask you...

- What would you most like to focus on?
 - Broader financial education
 - Better communications
 - More resources

So let us ask you...

- Do you see your plan as:
 - Genuinely global
 - Single country focused
 - Focused on a few countries, even if offered globally

Step 1: Why?

Identify your goals for promoting your stock purchase plan.

Do you have clear goals?

Has anything changed?

Check: Is there senior management buy-in?

Step 2: What?

Determine what information you want to communicate.

Plan feature focused

Financial wellbeing approach

Check: Does it fit with broader rewards and benefits?

Step 3: How much?

Determine your budget and resources.

Look back (a bit) to go forward

Think wide

Check: Are you making best use of academic research?

Step 4: Who?

Know your audience.

Don't forget the analytics

Don't forget to ask directly

Check: Is there a target audience?

Step 5: How?

Determine how you'll communicate.

What works now

What doesn't work

Check: What new tools are available?

Step 6: When?

Time communications appropriately.

Think of the ESPP timeline

Information overload

Check: Is the timing right?

Step 7: Review

Measure the effectiveness of the plan and your communication strategy.

Do the analysis again

Check back with the audience again

Check: Is this a GEO award winner?

Thank You

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Thank You

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