

Creating an ESOP Communication Plan

Guiding Questions:

- Where are you in your ESOP journey? (Just announced the transaction? Mature ESOP?)
- What are your goals for ESOP communication? Examples below:
 - Employee-owners are aware of the ESOP and its benefits.
 - Onboarding new employee-owners includes ESOP education.
 - Laying the foundation of an effective ownership culture.
- When is your stock price set?
- When are your annual statements distributed?
- Do you have busy/slow/significant time periods in your business cycle?
- Are there any significant company events during the year (celebrations, company-wide meetings, traditions, etc.)?
- Are there modes of communication that could be especially effective for your employee-owners?



[illegible]