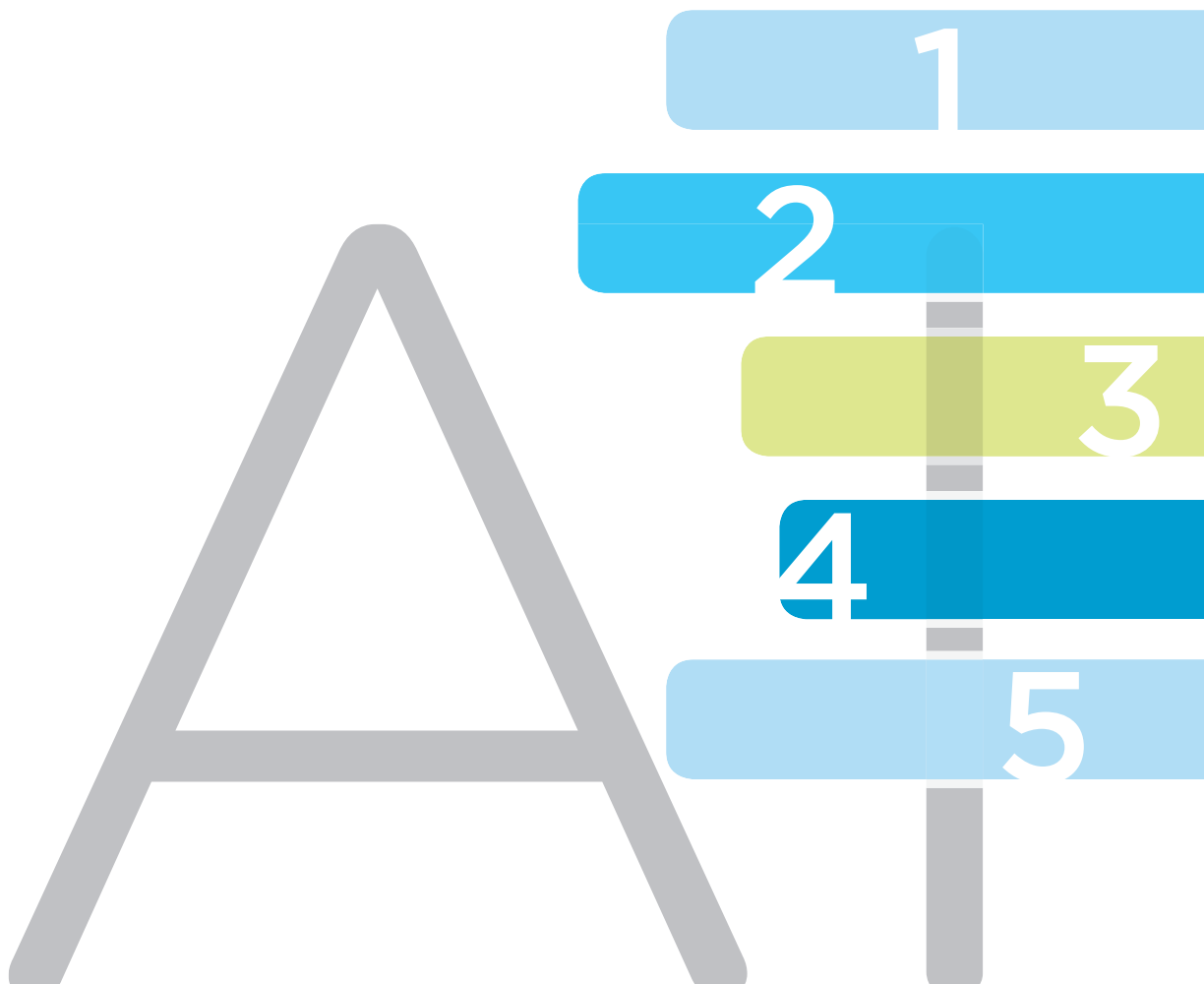




Making AI Stick: Five Ways to Execute After Your Summit

A simple approach for
meaningful and lasting results
from your Appreciative Inquiry





There is plenty of information out there about the Appreciative Inquiry process — but few resources to help companies know what to do after an AI. Here's what we learned about how to execute on the ideas produced by an AI — and how to make your AI vision stick.

At Clarke, after many years of successful operations, we found ourselves struggling to define our greater purpose in the world. Despite our success as a global provider of mosquito control solutions, we felt that there was something more. Something with more purpose and with greater focus on our social and environmental footprint.

We identified our core values: Care for the Planet, Care for People, Be Passionate about What We Do, and Do the Right Thing Even When It's Hard. And we crafted a mission statement... "to make communities around the world more livable, safe and comfortable." Those values and that mission provided a general guide for where we were going, but we had much work to do to put that mission statement into practice in our daily operations.

We had a noble goal, but no clear idea how to get there.

We set up a framework of employee committees we called Project Greater Purpose and created a Sustainability Advisory Board. Through the work of the committees we began to measure our environmental impact and implemented energy and waste programs to reduce our footprint. Momentum was building, but progress was slow and somewhat tentative.

We needed something lasting, something that would help to imbed our values and mission and our sustainability efforts into our DNA. Something that would enable us to accelerate our momentum and create an enduring climate of radical innovation.

We turned to Appreciative Inquiry (AI), a change management methodology pioneered by Dr. David Cooperrider and Dr. Ronald Fry of Case Western Reserve University's Weatherhead School of Management. AI begins with a discovery Summit to uncover, and figure out new ways to leverage, an organization's strengths. With the help of Dr. Cooperrider himself, we organized a three-day gathering that transformed our company.

THE SUMMIT: GOING FROM “ROAD BLOCKS” TO “ANYTHING IS POSSIBLE” TO “WHAT NOW?”

Our first Appreciative Inquiry Summit was conducted in February of 2012. The event brought together all of our 130 employees from five countries, along with customers, suppliers, key external stakeholders, and sustainability thought leaders from other industries. In total, we had close to 200 people come together to use the 4D process of Discover, Dream, Design and Deploy, to explore our “proudest prouds”, discover our strengths and leverage those strengths to envision a more innovative and more sustainable Clarke.

By the end of the three days, we had identified 12 opportunity areas for implementing our Summit objective. Some opportunities were truly unique and innovative (such as the aspiration to create a Clarke Center of Innovation) and some challenged us to push the envelope on programs already in place. Such as the moment when someone shouted out a challenge to not just settle for waste reduction – why not set a goal of ZERO WASTE? Instead of Health & Wellness (one of our existing committees), why not aspire to EXTRAORDINARY HEALTH AND HAPPINESS?

The Summit was full of such moments.

In the closing minutes of the Summit, the overwhelming reality of the work we had yet to do began to sink in. We had hundreds of sticky notes filled with new ideas, a freshly energized team and bold goals. We didn't want the work we'd already accomplished to get lost among the challenges of the day-to-day, or to lose our momentum toward achieving the vision we'd articulated.

And while there is a ton of good information about the AI process itself, we discovered that there weren't many resources addressing the post-Summit integration process. So we had to figure it out for ourselves. Along the way we learned a lot about how to execute on the grand plans that come out of an AI, and about how to make an AI vision stick. Here's what we learned about how to make sure your AI process leads to meaningful action — and how to make it stick.



The Five Basics of a Post-Summit Integration Plan

1

ESTABLISH A POST-SUMMIT TEAM

This team will be charged with driving the Summit ideas forward. Here's a simple structure that works well:

- **One Summit Integration Leader** — an established senior-level leader with broad authority and influence and the capacity to oversee the entire process of the Summit integration work.
- **An Executive Sponsor for each Opportunity Area** — a senior leader who can provide guidance and general direction to their Opportunity Area team and Champion.
- **One Champion for each Opportunity Area** — a spokesperson who will coordinate team meeting and facilitate their team's post-Summit work. Though Champions may be leaders in the company, they don't need to be; some of our most effective teams were helmed by emerging leaders without any formal organizational authority.

2

SCHEDULE FORMAL FOLLOW-UP CHECKPOINTS

Try starting with this framework and customizing it to fit your company.

DAYS POST-SUMMIT	CHECKPOINT
14	Opportunity Team Meetings Hold the first checkpoint meeting just two weeks after the Summit, while the momentum is fresh. Teams should reconvene to refine their ideas and identify three to five short-, medium- and long-term initiatives.
90	Summit Checkpoint I At this 90-day meeting, have each team present one to three recommendations they hope to pursue and a draft of their project plan with a preliminary cost/benefit analysis. Ask them to identify any low-hanging fruit they could knock out with minimal resources. Give feedback on the projects and Go/No-Go decisions when possible.
120	Summit Checkpoint II At the 120-day meeting, teams should each present a refined and detailed project plan that incorporates their Checkpoint I feedback. After this meeting, projects should be ready to be formally mapped to strategic initiatives and funded through your company's existing planning and budgeting process.

3

MEASURE YOUR AI INITIATIVES

What gets measured gets done, after all. One of the simplest ways to make the Summit part of the everyday operations of the business is to incorporate Summit progress reports and measurements into your existing review structure. The quarterly business meeting is a good place to review Summit initiatives and outcomes.

4

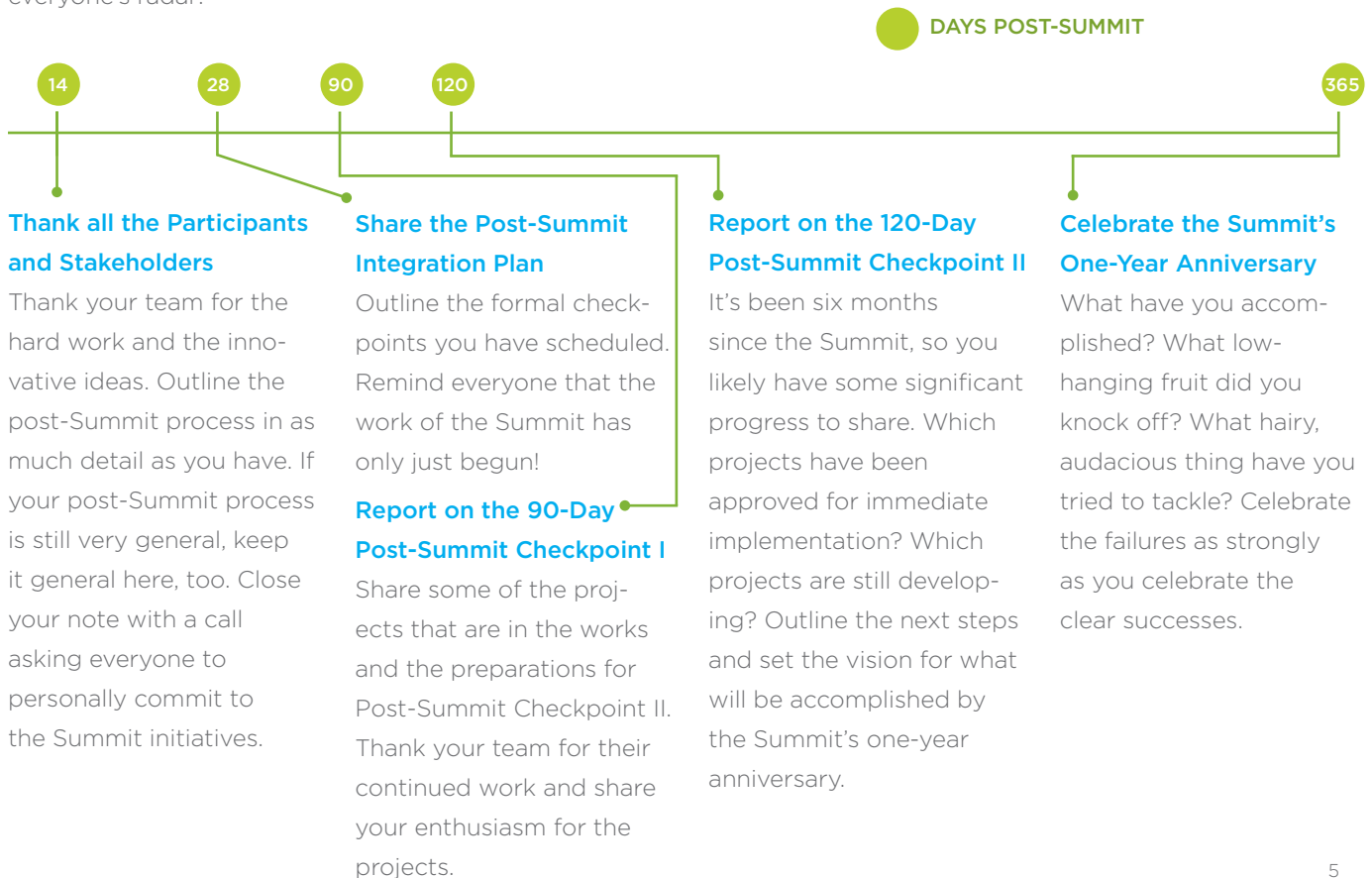
INTEGRATE YOUR POST SUMMIT INITIATIVES INTO EXISTING PROGRAMS & PROCESSES

While it's important that you track initiatives and activities linked to your summit, it's also important that you integrate these efforts into your existing business planning and management processes. This will ensure that initiatives have real ownership and accountability — that they're not just extracurricular endeavors.

5

COMMUNICATE YOUR PLANS AND YOUR PROGRESS

There's no better way to keep the AI momentum going than to remind your team of the initiatives it generated. Share your success along the way (a few teams should be able to knock out some quick wins right off the bat) and forecast the great things still to come. This simple communication plan will keep the Summit initiatives on everyone's radar:



Seven Lessons for Making AI Stick

Our first AI Summit was a groundbreaking event! In keeping with our objectives of that first Summit, we've accelerated our progress and embraced innovation as way of being. Through Appreciative Inquiry the commitment to sustainability and our mission, vision and values are now embedded in everything we do.

Here are the five biggest lessons we learned about making Appreciative Inquiry a permanent part of company culture:

1. It's OK to be vague.

If you've got your post-Summit plan figured out at the closing of the Summit, go ahead and lay it out. You can even go as far as assigning Opportunity Area Champions and Executive Sponsors. Otherwise, keep it general. It is far better to lay out a feasible broad framework than to promise detailed plans that might fall through.

2. Mind the Gaps

Too many people have experienced a great teambuilding event with no follow-up. Be mindful of the potential for your employees or stakeholders to assume that this is just another one of 'those' programs. That is the risk if too much time passes without an update or follow-up. Schedule meetings as soon as possible post-Summit and keeps the AI dialogue going to fill the gaps between events and activities.

3. It's OK to fail.

Let your team know that it's OK that some ideas won't survive the Summit. When employees hear from their managers or from the CEO that it's OK to fail, they drop the burden of feeling that every idea must become a successful initiative. When that happens, the company culture begins to transform and employees start to share their ideas for accomplishing the vision.

4. Not everyone will stay involved.

The person who eagerly raised their hand to become an Opportunity Area Champion may not actually have the time, tools or resources required. Rely on your Executive Sponsors to guide their team and configure it for success.

5. Don't ever stop listening.

When we created the Sustainability Advisory Board, we didn't realize that its most important function wasn't to vet and prioritize initiatives, but to serve as a listening board. Our board meets quarterly with the purpose of genuinely listening to ideas and sincerely guiding them. Just by listening, the board has built an environment of trust and a platform for everyone at our company to have a voice.

6. You'll never be done.

Appreciative Inquiry is not just an event — it's a methodology of leveraging the strengths of the organization to make real and sustainable change happen. After the Summit, make AI a critical part of your company culture by referencing it informally and using appreciative statements when you talk. Let your team hear you changing the question and asking, "What if we did?" and "How could we ...?" This will keep the entire team asking appreciative questions and sharing their ideas for executing the meaningful and lasting changes that were first envisioned at the Summit.

7. Have fun!

Integrating the work of your AI Summit is hard work – there's no doubt about that! It can also be incredibly impactful and meaningful work. Have fun with it and enjoy the experience of discovery and the process of turning the ideas and aspirations of your Summit into reality.

Appendix

If you've never executed an Appreciative Inquiry, seeing real pieces of communications that worked may help in your follow through. The following are real email communications and templates Clarke used in the 9 months following our A.I. Feel free to use and modify to fit your needs.



10 OPPORTUNITY AREAS



EXISTING STRATEGIC INITIATIVES

- Drive NextGen product adoption
- Drive growth in U.S. revenue
- Accelerate International expansion
- Build our future via focused new product development
- Explore un-served markets

EXISTING ORGANIZATIONAL OVERSIGHT TEAMS

- Project Greater Purpose
- Clarke+ Stewardship

Post Summit Integration Process

SUGGESTED FRAMEWORK & MILESTONES TABLE

Post Summit Integration Process Suggested Framework & Milestones

Activity	Timing	Who	Commentary
Follow-up (thank you) to external stakeholders	1-2 weeks		send out as soon as possible after event
Collate notes from Summit (table report outs, opportunity team brainstorm, etc.)	1-2 weeks		this information will be important for you to review and for your opportunity teams
Confirm Post-Summit Integration Team roles (Executive Lead, champion(s), opportunity team leads)	1-2 weeks		In addition to the Executive Lead, we recommend that you identify Post-Summit Integration Champion(s) to help move the process along. Champions can help to craft messaging, coordinate meeting, gather reports from opportunity team. Champions help to ensure alignment of direction from Executive Lead to Opportunity Team Leads.
Presentation to Board of post Summit integration process	2-4 weeks		
Report out to all employees re post Summit integration process	2-4 weeks		As soon as practical, it is a good idea to send a communication to all employees regarding your plans for how you will move forward with the great ideas that came out of the summit. This first communication reminds employees that the work of the Summit has just begun and sets the stage for what should be a structure and process for regular updates and reports on progress.
Team Leads Progress Report	tbd		Determine how you will hold your teams accountable for making progress on their initiatives. Clarke used their Summer Summit series to move projects along and to integrate those projects into our annual planning process as well as into employee job responsibilities and departmental performance expectations.
Report out to all stakeholders (formal update of progress on initiatives)	60-90 days		Establish a plan for periodic reporting to all stakeholders on the progress of initiatives and activities that are directly related to the Summit. Recommend that you stay with this for a least a full year.
Report out to all stakeholders (formal update of progress on initiatives)	6 months		
Report out to all stakeholders (formal update of progress on initiatives)	9-12 months		

Post Summit Integration Process

CLARKE+ 2012 TABLE

Clarke+ 2012

Post Summit Integration Process

Date	Action/Activity	Who	format	Attachments
February 7-9, 2012	Clarke+ Summit	all	3 Day Meeting	
2/9/2012	Clarke+ Day 3 Going Forward presentation to Summit attendees	V.P. HR/SD	ppt slides	Clarke+ Day 3 Going Forward.ppt
3/8/2012	Thank you to external stakeholders	CEO	email	Clarke+ thank you to external stakeholders.doc
3/22/2012	State of Clarke presentation - Post Summit Integration Plan	CEO	ppt slides	Clarke+ Integration Process State of Clarke 032212.ppt
3/26/2012	direction to Opportunity Team Leads re Integration Plan	V.P. HR/SD	email & attachments	email Clarke+ Brainstorm - Zero Waste.xls
3/29/2012	communication to all employees re Integration Plan	V.P. HR/SD	email & attachments	email Clarke+ Integration Plan slides.ppt
4/27/2012	Summer Summit I Presentation Guidelines	V.P. HR/SD	email & attachments	email Clarke Summer Summit I Presentation Template.ppt
May 14-15, 2012	Summer Summit I	SAB & Opportunity Team Leads	2 Day Meeting	Clarke Summer Summit I Presentation Sample.ppt
5/18/2012	Report Out to all Stakeholders	CEO	email	Clarke Report Out Summer Summit I.doc
6/13/2012	Summer Summit II Presentation Guidelines	V.P. HR/SD	email & attachments	email Clarke Summer Summit II Presentation Template.ppt
June 25 & 29, 2012	Summer Summit II	SAB & Opportunity Team Leads	2 Day Meeting	Clarke Summer Summit II Presentation Sample.ppt
8/9/2012	Report Out to all Stakeholders	CEO	email	Clarke Report Out Summer Summit II.doc
12/5/2012	Report out to all stakeholders	CEO	email	Clarke+ Report Out Update December 2012.doc

Report Out to All Employee regarding the Post-Summit Process

As soon as is practical, it is a good idea to send a communications to all internal stakeholders regarding your plans for how you will move forward with the great ideas that came out of the Summit. This first communication reminds internal stakeholders (employees) that the work of the Summit has just begun and establishes the structure and process for regular updates on progress.

From: [Julie Reiter](#)
To: [Clarke Everyone](#)
Subject: Clarke+ Opportunity Area
Date: Thursday, March 29, 2012 12:08:06 PM
Attachments: [Clarke+ Integration Plan Opportunity Grid.pptx](#)

In Lyell's presentation to the company on March 22nd, he announced the Clarke+ Integration Plan. This plan is designed to enable us to fully evaluate our 12 Opportunity Areas and to use the power of the Opportunity Area teams to develop formal initiatives for us to pursue. Some, low hanging fruit, initiatives may be developed and implemented in 2012. The more significant initiatives (those requiring funding or significant planning) will be reviewed during a series of "Summer Summit" meetings that will kick off our 2013 long range planning processes.

Attached is a copy of the slides showing the Opportunity Area assignments. If you signed your name to an Opportunity Area worksheet (at Clarke+), you can expect to be contacted by the Lead with an invitation to participate in this initiative development process.

You are not restricted to any one Opportunity Area!

In fact, you are encouraged to get involved wherever you have interest or inclination. Just reach out to the appropriate Opportunity Area Lead and let them know that you'd like to be involved.

Feel free to contact me as well...if you have any questions!

Julie E. Reiter
Vice President, Human Resources

Report from Summer Summit I

We established a communication plan that would keep stakeholders informed and engaged in our post-Summit activities throughout the year of the Summit. This email was sent to **all** Summit Stakeholders (internal and external) from Company President & CEO, Lyell Clarke.

Report from Summer Summit I

The first session of our Summer Summit series was held on Monday, May 14th. The meeting was held at the Northern Illinois Food Bank's new LEED Gold facility in Geneva, Illinois. For more information about the great work that the Northern Illinois Food Bank is doing to combat hunger in Boone, DuPage, DeKalb, Grundy, Kane, Kankakee, Kendall, Lake, McHenry, Ogle, Stephenson, Will and Winnebago counties, I encourage you to visit their website at <http://solvehungertoday.org/>.

At this Summer Summit meeting, representatives from the Clarke+ Opportunity Area Teams presented their proposed initiatives. Based on the outstanding quality of the presentations, it's clear that these teams have done a great deal of work to translate the dreams of Clarke+ into actionable plans to accelerate sustainability.

Proposed initiatives such as an idle management system for our fleet vehicles, adoption of fleet optimization practices, and installation of LED lights at our Garden Avenue facility have a relatively short term return on investment and the potential to have an immediate impact on reducing our carbon footprint. Other initiatives are more long term and equally exciting and impactful – including the ambitious goal to achieve Zero Waste at 20% of our facilities by 2014, development of a customer portal or similar solutions to elevate our customers' experience, more comprehensive Health & Wellness programs, adoption of work-life balance and corporate philanthropy policies, and strategies for influencing a paradigm shift in our industry.

Each team will receive feedback from Monday's meeting that will help them to fine tune their plans for Summer Summit II scheduled for June 25th. From there, initiatives that are given a green light will be announced and integrated into our Long Range and Annual Planning processes.

Thank you all for your continued passion in designing actionable initiatives that support the dreams of Clarke+. And a special thank you to the committees, teams and team leaders for all of their hard work.

J. Lyell Clarke III
President & CEO

Summer Summit II Update

Report from Summer Summit II

This week marks the 6 month point since we came together at Clarke+ to envision a more sustainable and radically innovative Clarke. Since that momentous occasion, representatives from the Clarke+ Opportunity Area teams have come together for two Summer Summit sessions at the [Northern Illinois Foodbank's](#) LEED Gold facility in Geneva, Illinois.

The team representatives have all done a truly remarkable job of translating the dreams of Clarke+ into actionable plans to accelerate sustainability.

The following initiatives have been approved for immediate implementation or for integration into our long range planning process:

Transformational Energy:

- An initiative to achieve Zero Waste at 20% of our facilities by the end of 2014;
- Pilot testing of idle management and engine calibration systems to improve the fuel efficiency of our service fleet.
- Development of a Fleet Optimization Best Practices Program for our service operations.
- Installation of energy saving LED lights at our Garden Avenue Manufacturing and Service facility.

Extraordinary Health & Happiness:

- Development of a Flex Work Policy that will provide guidelines for flexible work schedules and flexible work spaces.
- Enhancements to our Wellness Programs to increase participation in Biometric Screening and incentivize employees to engage in healthy habits and healthful activities.

How Does Clarke Care?:

- Development of corporate philanthropy initiatives including an Employee Scholarship Program and a plan to commit a percentage of Clarke's "next generation" revenues to environmental efforts.

Elevated Customer Experience:

- Customer surveys and an action plan to make immediate process improvements to elevate our customers' experience.

Additionally, the Opportunity Area Teams continue to develop plans and explore initiatives to Accelerate NextGen, expand our Water Resource Management programs, develop Radical Partnerships and become a Bold Catalyst for change in our industry and in the world around us.

J. Lyell Clarke III
President & CEO

Report from Summer Summit II

It's been nine months since we joined together at Clarke+ to envision a more sustainable and radically innovative Clarke. Since that powerful event, representatives from the Clarke+ Opportunity Area teams have been hard at work making progress on their initiatives and developing formal action plans for 2013. The teams recently presented their initiative updates at our quarterly Sustainability Advisory Board meeting.

Some of the highlights from the teams include:

- The **Zero Waste** Team formally launched the *Zero Waste Challenge* in September and announced the goal to have at least 20% of our facilities achieve Zero Waste (meaning, no waste from that facility will be sent to landfill) by the end of 2014. The team kicked off the project at our largest facility (the Garden Avenue service and manufacturing location) with a waste assessment and formation of a team of Waste Champions to implement waste stations and conduct employee training. The formal Zero Waste plan will be rolled out to more sites in early 2013.
- **Transformational Energy** has begun the process of converting to CFL bulbs in the manufacturing area at our Garden Avenue facility and plan to make improvements to the exterior lighting in 2013. This team has also developed a plan to expand the idle management and engine calibration systems programs to our national service fleet for the 2013 season and to incorporate solar and electric powered equipment into our service operations starting in 2013.
- **Extraordinary Health & Happiness** kicked off our 2012-2013 Health & Wellness programs in September with the introduction of a revised Wellness Incentive Program, a Weight Watchers at Work Program and our annual Biometric Screening. 78% of employees have participated in the Biometric Screening program - up from 63% in 2011. This team is responsible for developing our new PTO policy and the drafting of a Flex Work policy.
- Based on the results of a "mini" customer survey, the **Elevated Customer Experience** team made some changes to our phone system to eliminate dead ends and to make it easier for our customers to reach their Control Consultant. Additionally, we've added customer email notification features for our service customers and are working with our shipping carriers to provide product customers on-line tracking of shipments.
- Focusing their efforts on communities both far and near, the **How Does Clarke Care** team helped to coordinate this summer's Net for Nets Charity Golf Outing and Banquet – raising funds for the Clarke Cares Foundation to protect 25,000 people in Nigeria from the devastating effects of Malaria and Lymphatic Filariasis. On September 24th, Clarke employees participated in our first annual Day of Caring – donating more than 1,300 hours to conservation activities throughout the country. This event brought our total volunteer hours for 2012 to 2,133 – surpassing our annual goal as well as the 2014 target of 2080 hours!
- In our commitment to expand the conversation about sustainability and to be a **Bold Catalyst for External Change**, we are collaborating with customers and, Green Recovery author, Andrew Winston to hold the first Sustainability symposium at the American Mosquito Control Association annual meeting this coming February.

The energy that was generated by Clarke+ continues to propel us forward. As we come to the close of 2012, we pause to recognize the progress that we've made in becoming more innovative, more sustainable, and more responsible. You've been a part of this process and we'd like to thank you for your partnership. You are Clarke+.

J. Lyell Clarke III
President & CEO

Post Summit Check Point I

Opportunity Area Presentations

90 Days Post Summit

[opportunity area name]

Aspiration Statement

- Share the Aspiration statement for your opportunity area.
- You do not need to adhere to the Aspiration Statement developed at summit - although you should use this as your starting point.
- Teams should review their aspiration statement and revise as necessary or as appropriate to reflect the objective going forward.

[opportunity area name]

Initiative Review Process

- Briefly discuss your team's process of developing and identifying your primary initiative or initiatives.
- Provide a listing of the key initiatives that you reviewed and discussed.
- Identify the meaningful (or not) initiatives that did not make your final cut.

[opportunity area name]

[Initiative or Initiatives being considered]

- Identify and provide an overview statement describing the initiative or initiatives (no more than 3) that this team is proposing.
- If there are multiple initiatives share a listing and use additional slides to describe each initiative that is being presented for consideration in our Long Range Planning processes.
- Duplicate the following slides as appropriate for multiple initiatives.

[opportunity area name]

Benefits

- Identify and explain the benefits of your proposed initiative.
- How will your initiative support your aspiration statement or the company's sustainability goals?
- How does your initiative support the objectives of the company (*List the objectives*)?

[opportunity area name]

Costs

- Identify and explain the costs and resource investment associated with your proposed initiative.
- Consider organizational resource needs as well financial investment in your explanation of costs.
- Be as specific as possible based on the planning that you've done so far.
 - If a multi-year effort, identify the financial investment for each year, identify start-up costs and long-term annual fees.
 - If possible, provide an estimate of the return on investment.

[opportunity area name]

Project Planner Template

Major Milestone	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
[milestone #1]												
[milestone #2]												
[milestone #3]												
[milestone #4]												
[milestone #5]												
[milestone #6]												

Commentary

- Identify the Project Team members – project lead and supporting players
- Provide additional commentary to explain the project plan.

[opportunity area name]

Summary

- Use the summary to restate the benefits of your initiative(s).
- Make or restate your compelling argument for why the company should pursue your proposal.
- If appropriate, identify any immediate action that needs to be taken.

Post Summit Check Point II

Opportunity Area Presentations

120 Days Post Summit

[opportunity area name]

Aspiration Statement

- Share the Aspiration statement for your opportunity area.
- You do not need to adhere to the Aspiration Statement developed at our AI event - although you should use this as your starting point.
- Teams should review their aspiration statement and revise as necessary or as appropriate to reflect the objective going forward.

[opportunity area name]

Initiative Refinement Process

- Discuss the feedback that you received from (90-day review meeting name) and how your team worked to address or respond to this feedback.

[opportunity area name]

[Initiative or Initiatives being considered]

- Identify and provide an overview statement describing the initiative or initiatives (no more than 3) that this team is proposing.
- If there are multiple initiatives share a listing and use additional slides to describe each initiative that is being presented for consideration in our Long Range Planning processes.
- Duplicate the following slides as appropriate for multiple initiatives.

[opportunity area name]

Benefits

- Identify and explain the benefits of your proposed initiative.
- How will your initiative support your aspiration statement or our company's sustainability goals?
- How does your initiative support the objectives of the company (*List initiatives*)?

[opportunity area name]

Costs

- Identify and explain the costs and resource investment associated with your proposed initiative.
- Consider organizational resource needs as well financial investment in your explanation of costs.
- Be as specific as possible based on the planning that you've done so far.
 - If a multi-year effort, identify the financial investment for each year, identify start-up costs and long-term annual fees.
 - If possible, provide an estimate of the return on investment.

[opportunity area name]

Project Planner Template

Major Milestone	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
[milestone #1]												
[milestone #2]												
[milestone #3]												
[milestone #4]												
[milestone #5]												
[milestone #6]												

Commentary

- Identify the Project Team members – project lead and supporting players
- Provide additional commentary to explain the project plan.

[opportunity area name]

Summary

- Use the summary to restate the benefits of your initiative(s).
- Make or restate your compelling argument for why the company should pursue your proposal.
- If appropriate, identify any immediate action that needs to be taken.



FOR MORE INFORMATION CONTACT

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