

Planning your Annual Report

A Step by Step Guide



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Annual Reports require many elements to come together to ensure your production runs to schedule. These steps are designed to help you develop a project plan for the smooth delivery of your next annual report.

Step 1

Project checklist

These tasks outline what you need to put in place both inside and outside your organisation to deliver your Annual Report.

Planning phase

- Assign project team
- Content creators
- Approvals - Board etc
- Financials - Auditors
- Check all stakeholder's annual leave plans
- Create provisional project scope

Content phase

- Content outline aligned with strategic plan
- Design direction
- Photography requirements
- Create content
- Design concepts created

Production phase

- Submit all content from creators
- First flow
- Proofreading
- First draft supplied to client
- First draft review submitted
- Revision phase(s)
- Final sign off from client
- Artwork supplied to printer
- Printed reports delivered
- AGM held



Step 2

Project schedule

Creating a provisional schedule is a good way to get you started. This timetable is designed to help you set easy to follow milestones so your Annual Report production is easy to stay on track.

Proposed schedule			
TIME BEFORE AGM	KEY TASKS	EST START DATE	ADD YOUR DATES
Five months	Planning Phase	Jun 1	
Four months	Content Phase Content creation commences	Jul 1	
Three months	Design phase commences	Aug 1	
Two months	Production phase Approved content ready for production	Sep 1	
One month	Approved financials ready	Oct 1	
Three weeks	Artwork supplied to printer	Oct 11	
One week	Reports delivered	Oct 25	
Deadline	AGM held	Nov 1	

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