

# Annual Plan

## Introduction

I was leading a division for the first time, and had to plan the work of other functions in the company as well. I had already witnessed problems due, in spite of the fact that these took place at the same time, so I knew that I could remain synchronised, but realised that there was no n

**The annual plan needs to exist at the company level**, enabling it to meet its obligations. The benefits are immediate and significant for management confidence that it won't be sabotaged by external important and influential people. Each division or part can plan and perform their work without being su

## Configuration

I have been using this same plan for more than 20 years. At the beginning of each year, the advantages far outweigh that minor administration. Follow these steps to tailor the template to your needs, and to be

- Set the date in Cell H4 to the Monday of the week which contains the start of the financial year. N.B. entering the date will follow the format mm/dd/yy, regardless of the current date. E.g. If financial year starts 1st Jan, in 2026 that day falls on Thursday.
- Some years have 53 weeks. Insert week columns where necessary. Tip: insert columns inside the table to maintain same data and formulae.
- The number of weeks in a month varies from year to year. I count 4 weeks in January, because most days fall in the month.

N.B. When you move weeks into other months, you will also need to move the formulas.

- There are six sections in this template, representing six major parts of your company.

N.B. I include a section for shareholders and members of the board, including the CEO to see the overall alignment between functions.

## Using the Annual Plan

### A - Decide which events to plan

The most difficult part is deciding which events are important enough, sufficient events, and not drown in information.

Column	Description
C - Events	The list of major events, interactions, and obligations across the company, divided into sections representing each function, division, or department.
D - Period	The frequency of the event.
E - Timing	The constraints that need to be considered when scheduling this event.
F - Responsible	The role in the company which is responsible for this event taking place, and approving the schedule.
G - Receiver(s)	Shows who is directly affected by this event.

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N.B. Once this section is completed and all events have been plan

## B - Annual Planning

The annual planning happens in the calendar section (columns H

No.	Events	Per	Timing	Responsible
101	• Call to AGM	Annum	4-6w prior	Board
102	• Annual General Meeting	Annum	< 6 m EOFY	Chairperson
103	• Call to Board Meeting	Quarter	7d prior	Chairperson, MD
104	• Board Meeting	Quarter	Mar, Jun, Sep, Dec	Chairperson
105	• Annual Budget	Annum		MD
106	• Annual Business Plan	Annum		MD
<b>100 Shareholders / Board of Directors</b>				

- In row 4, the date will automatically turn from green to yellow (February can now be hidden to reduce clutter).
- Following the conventions of a Gantt chart, planning is denoted
- The plan can be that the event will take place within a period (e.g. specific a fixed event is, the better for the organisation to synchronise).

The benefit of the annual plan can also be illustrated using the example. It becomes routine. Everyone knows when it will occur, and will start to realise there is an impending board meeting when they receive the notice. (If it is dictated by national labour law, or company bylaws) it is disrupted. It will most usually be expected to provide data and materials. If, however, last week of January, they can either block time or avoid accepting the meeting.

It seems (and is) a very simple thing to do, and obvious once you consider the outcome has only been positive.





k for my division while taking into account planned interactions with most  
previously the surprise and panic when budgeting and performance appraisals  
ne ever year. I created this annual plan as a way of mapping major events so  
macro-planning at the company level for me to fix on.

the company to synchronise around major events, interactions, and mutual  
ers who can prepare, be punctual, and also plan their own work in the  
urgent obligations. The aim is to synchronise the company so that each  
rprised by regular, fixed events.

beginning of each year it needs to be modified and set up for the new financial  
e used in a new financial year.

ns the first day of your financial year.  
s of how it is displayed in the cell.  
day of week 1, and week 1 2026 has its Monday on 29th Dec.

ary to ensure that you include weeks for 1st January and 31st December.  
rmatting.

nt how many weekdays are in each month, and move it to the month where

d to modify the border of the Month, and Quarter to match.

arts of a company. Rename and add sections to represent all the functions in

rd, which is beyond the operations of the company, but it is good for everyone  
s.

ough to plan. The fewer the better. We want to show the necessary and

### Usage

Do not go into too much detail; use the following criteria as a guide:-

- Do other divisions/departments need to know about this event? That is, do they contribute, and need to know when this occurs?
- Do I need to announce that I have a fixed commitment at this date, which blocks our availability for other considerations?
- Is this event/work fixed and regular? That is, everyone benefits by knowing this in advance.

How often is it today? Is it too often, or need to be more often? As this is supposed to be major cross-company co-ordination, question whether weekly or shorter should be in the plan.

e.g. Company bylaws might specify that the invitation for a board meeting and all supporting documentation must be made 30 days prior to the meeting. Nevertheless, it is common to get the information the night before, so no-one can be prepared for the meeting. If the week of the board meeting is fixed, this will never be an issue.

ined for the year, columns D-G can be collapsed to reduce clutter.

-BH) of the template. The explanation will use the following example:-

Receiver(s)	Q1																	
	January				February				March				April					
	W1	W2	W3	W4	W5	W6	W7	W8	W9	W10	W11	W12	W13	W14	W15	W16	W17	W18
Shareholders	29 Dec	5 Jan	12 Jan	19 Jan	26 Jan	2 Feb	9 Feb	16 Feb	23 Feb	2 Mar	9 Mar	16 Mar	23 Mar	30 Mar	6 Apr	13 Apr	20 Apr	27 Apr
Shareholders																		28
Board of Directors, MD			28															
Board of Directors, MD																		
Board of Directors							28											
Board of Directors																		

nce the week has passed. In this example, the columns for January and

l by blue cells.

e.g. 101), within a week (e.g. 103), or on a specific date (e.g. 104). The more  
nise, and plan around it.

example of the board meeting. If the event is set at the same each year, it  
rt preparing their input for the meeting. If (as is common) busy managers first  
ie invitation to attend (and present) one week prior to the meeting (which can  
ptive. Managers are not always called to present at board meetings, but they  
owever, managers know that the board meeting will always be held in the  
g new work the week before when they will need to prepare for the board

know. I have presented this idea at multiple companies and customers, and

