

# Annual Plan

A template for co-ordinating key events, commitments, and interactions across a company



# Benefits of an Annual Plan

- ▶ Have you ever witnessed the surprise and panic when annual budgeting and performance appraisals are due, despite taking place at the same time every year?
- ▶ The annual plan needs to exist at the company level, enabling all parts to synchronise around major events, interactions, and mutual obligations.
- ▶ The benefits are immediate and significant: managers can prepare, be punctual, and also plan their own work in the confidence that it won't be sabotaged by external important and urgent obligations. The aim is to synchronise the company so that each division or part can plan and perform their work without being surprised by regular, fixed events.



# Excel template

Download at <https://Punkfrog.se>

| No. | Events                            | Q1      |       |        |        |        |          |       |        |        |       |       |        |        |        |       |        |        |        |
|-----|-----------------------------------|---------|-------|--------|--------|--------|----------|-------|--------|--------|-------|-------|--------|--------|--------|-------|--------|--------|--------|
|     |                                   | January |       |        |        |        | February |       |        |        |       | March |        |        |        | April |        |        |        |
|     |                                   | W1      | W2    | W3     | W4     | W5     | W6       | W7    | W8     | W9     | W10   | W11   | W12    | W13    | W14    | W15   | W16    | W17    | W18    |
|     |                                   | 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 |
| 101 | •                                 |         |       |        |        |        |          |       |        |        |       |       |        |        |        |       |        |        |        |
| 102 | •                                 |         |       |        |        |        |          |       |        |        |       |       |        |        |        |       |        |        |        |
| 103 | •                                 |         |       |        |        |        |          |       |        |        |       |       |        |        |        |       |        |        |        |
| 104 | •                                 |         |       |        |        |        |          |       |        |        |       |       |        |        |        |       |        |        |        |
| 105 | •                                 |         |       |        |        |        |          |       |        |        |       |       |        |        |        |       |        |        |        |
| 106 | •                                 |         |       |        |        |        |          |       |        |        |       |       |        |        |        |       |        |        |        |
| 100 | Shareholders / Board of Directors |         |       |        |        |        |          |       |        |        |       |       |        |        |        |       |        |        |        |
| 201 | •                                 |         |       |        |        |        |          |       |        |        |       |       |        |        |        |       |        |        |        |
| 202 | •                                 |         |       |        |        |        |          |       |        |        |       |       |        |        |        |       |        |        |        |
| 203 | •                                 |         |       |        |        |        |          |       |        |        |       |       |        |        |        |       |        |        |        |
| 204 | •                                 |         |       |        |        |        |          |       |        |        |       |       |        |        |        |       |        |        |        |
| 200 | Marketing & Sales                 |         |       |        |        |        |          |       |        |        |       |       |        |        |        |       |        |        |        |
| 300 | Human Resources                   |         |       |        |        |        |          |       |        |        |       |       |        |        |        |       |        |        |        |
| 400 | Finance                           |         |       |        |        |        |          |       |        |        |       |       |        |        |        |       |        |        |        |
| 500 | Legal / Compliance                |         |       |        |        |        |          |       |        |        |       |       |        |        |        |       |        |        |        |
| 600 | Operations / Delivery             |         |       |        |        |        |          |       |        |        |       |       |        |        |        |       |        |        |        |



# Configure the Template

## Begin the new financial/calendar year

- ▶ Set the date in Cell H4 to the Monday of the week which contains the first day of your financial year.
  - ▶ N.B. entering the date will follow the format mm/dd/yy, regardless of how it is displayed in the cell.
  - ▶ e.g. If financial year starts 1st Jan, in 2026 that day falls on Thursday of week 1, and week 1 2026 has its Monday on 29th Dec.
- ▶ Some years have 53 weeks. Insert week columns where necessary to ensure that you include weeks for 1st January and 31st December.
  - ▶ Tip: insert columns inside the table to maintain same data and formatting.
- ▶ The number of weeks in a month varies from year to year. I count how many weekdays are in each month, and move it to the month where most days fall.
  - ▶ N.B. When you move weeks into other months, you will also need to modify the border of the Month, and Quarter to ma
- ▶ There are six sections in this template, representing six major parts of a company. Rename and add sections to represent all the functions in your company.
  - ▶ N.B. I include a section for shareholders and members of the board, which is beyond the operations of the company, but it is good for everyone including the CEO to see the overall alignment between functions.



# Decide Which Events to Plan

The most difficult part is deciding which events are important enough to plan.  
The fewer the better.  
We want to show the necessary and sufficient events, and not drown in information.

| Column          | Description  | Usage   |
|-----------------|--|---|
| C - Events      | The list of major events, interactions, and obligations across the company, divided into sections representing each function, division, or department. | Do not go into too much detail; use the following criteria as a guide:- <ul style="list-style-type: none"> <li>• Do other divisions/departments need to know about this event? That is, do they contribute, and need to know when this occurs?</li> <li>• Do I need to announce that I have a fixed commitment at this date, which blocks our availability for other considerations?</li> <li>• Is this event/work fixed and regular? That is, everyone benefits by knowing this is advance.</li> </ul> |
| D - Per         | The frequency of the event   | 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 - Timing      | The constraints that need to be considered when scheduling this event.   | 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.  |
| 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.  |   |

Once this section is completed and all events have been planned for the year, columns D-G can be collapsed to reduce clutter.







# Avoid Surprises with an Annual Plan

→ Get started or learn more: [enquiry@punkfrog.se](mailto:enquiry@punkfrog.se)

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# Related Frameworks

- ▶ NewBiz™
  - ▶ A discipline for validating product & market viability before investment.

