

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"> • 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 is advance.
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 the Annual Plan template.

→ Contact us at enquiry@punkfrog.se



Related Frameworks

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

