

Annual Report checklist & guide for editors

By reportmachine.com.au @ReportMachine

Preparation stage

Before anyone else is involved – maybe just your immediate team

- Compile a list of authors and contributors from last year
- Compile a list of chapters and subheaded sections from last year
- Cross-check the list of chapters against the list of authors – is there someone missing? Or is there a section that doesn't seem to have a contributor responsible for it?
- Set up your list of contributors on a single tracking spreadsheet, showing which sections they need to write and when they're due
- Contact each of the authors and contributors who will be needed for this year's annual report personally and remind them that the annual report is coming up and that you are looking forward to their contribution.

Planning & negotiation stage

The period when you find out what the constraints of the job are and set key deadlines

- Analyse the 'Table of Contents' from last year – is there anything that *needs* to change?
- Find out who you need to liaise with regarding the accounts, including who organises the auditor. Asking them what they need; include them in the plan
- Decide how you want the annual report to be published – print, online, PDF – or a mix of all three? If you are having the annual report printed, how many copies do you need?
- Do you need to have any of the printed annual reports delivered? If so, how many? (some printers also offer distribution)
- Write a brief for the printer (request for quotation or work order)
- Create a brief for the graphic designer.
Include tangible elements such as whether there are any professional photographs available, what your budget is, and what your brand identity is – use your style guide if you have one. Include main colours you would like on the front cover, what kinds of design you like.
- Set two (possibly three) deadlines for contributors, including the people in accounts and the graphic designers. Make sure these dates give you plenty of time to follow up late contributions
- Negotiate milestones and deadlines with your graphic designer and printer. Be firm but not unrealistic. Ensure that you leave plenty of time for errors.
- Who is going to write the Chair's or President's Message? Does he or she know what the deadline and word limit is?
- Are there any major events due to happen between now and completion of the annual report

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production? How can you include them?

Are there any adverse events that need careful coverage in the annual report? If so, it's good to raise this with the relevant team in advance.

Create a master document – this will be the document into which all the submissions will go. You may revise it a few times, but there has to be one there in the first place!

Writing & editing stage

Communicate with everyone necessary about what is due when, what the guidelines are, negotiate changes where necessary

As each submission arrives, open it and check it for completeness – sometimes people send rough drafts in

File contributor's submissions as they come in and tick them off your list, send an email thanking them

Monitor the progress of the graphic designers. Have they showed you and roughs yet?

Send a message to remaining contributors to remind them of the deadline – be encouraging

Set aside a period each day to go through each submission and incorporate it into the master document, editing as you go

Write the sections assigned to you as contributor

Draft the Executive summary – make sure you give it so someone else for feedback as this section is often the only part of an annual report that people will read

When the annual report is 70% complete, read through it without stopping – does it make sense? Is there something missing or something that should be removed?

Urgent and important stage

All annual report projects have this stage – some of them for the whole project! ☺

Send a message reminding people who have gone over deadline that their work is needed urgently (don't bully people – it doesn't produce good work)

Offer to help people who are 'stuck' – but resist the inevitable requests that you write it for them!

Send an email interview to people who are freezing up – ie you write out a series of questions and ask them to type their answers in the spaces

Proof-reading and fine-tuning stage

Proof-read, fine tune and check agreements with printers and so on

Fine-tune the Executive Summary

Who has the mailing list for the people to whom the printed annual report needs to be delivered? Do the addresses need to be checked?



Send the designed annual report off to an independent proofreader.
 Best practice is that the compiler/editor of the annual report **does not** do this, as he or she has already spent a lot of time looking closely at the document and is less likely to pick up errors. Even the most professional, experienced editor should have another person nominated to proof-read the annual report.

Publication and Submission stage

Time to publish the annual report and submit it to relevant authorities, including shareholders or stakeholders

Who has the email list for online and PDF delivery of the annual report? Does the list need to be checked? Does the list comply with the anti-spam laws in your state or country?

Write and test email introducing annual report

Promotion stage (optional)

Some organisations like to promote their annual report or some of the key results from that year

Commission graphic designer to create a few short, interesting info graphics from some of your data

Write and schedule tweets and Facebook updates, and create a quick introduction for your organisation's website or blog

Contributors

Name	Sections	Notes

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