

# Annual Report checklist & guide for managers

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This guide is for people who are responsible for producing their organisation's annual report, but who supervise the work rather than carry it out.

## Preparation stage

*Before anyone else is involved – maybe just your immediate team*

Assign budget and time to the annual report. You will need to consider whether you want the annual report printed and distributed, and what skills will need to be brought in from outside, if any. Work backwards from the government-mandated due date if you have one. Some organisations present their annual report just before the annual general meeting.

Assign someone to be the project manager or editor of the annual report. This does not necessarily have to be someone in marketing or accounts, but it does have to be someone who can handle complexity, and who has good people skills

With the editor/project manager, ask graphic designers for quotes, or brief an already-selected designer on this year's report

Ensure that printers and/or distribution contractor are responding to the editor's request for quotes. Keep as much of the negotiations in writing (email). Ensure that dates are agreed upon and in writing.

Have the editor create a project plan, and discuss it to ensure it is realistic. Discuss how individual personalities amongst the contributors might be handled (see the Annual Report Editor's Checklist to give you an idea of the constraints and responsibilities in the Editor's role)

Ensure that organisational contributors are aware that you think their contribution is important and must be done on time – this supports the editor in gathering contributions

## Writing & editing stage

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

Regularly check progress on

- Contributions – what % have been handed in? How rough are they? Who's dragging their heels?
  - Printers' tasks – quote, quote acceptance, account people assigned, etc
  - Designers' tasks – concept approved? Cover created and reviewed, style ok?
  - Production – what/who is holding things up?
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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 production? Ensure that the editor knows about them if you want them included in the annual report

Are there any adverse events that need careful coverage in the annual report? If so, it's good to discuss it with the editor

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Ask to review the Executive Summary– this is not likely to be completed until the last minute but *must* have a second person review it

**Urgent and important stage**

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

Many contributors will not have sent in their sections – editor may need vocal support from you at this stage

**Proof-reading and fine-tuning stage**

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

The editor will probably not need much from you at this stage

**Publication and Submission stage**

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

Check that the arrangements for the printers are as they should be; printers' schedules are prone to change if another, bigger job comes along

**Promotion stage (optional)**

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

Ensure the right person has access to social media to carry out this task

**Notes**

