

Guide to Summarizing your Annual Plan

Use this brief guide as a tool to help you complete the [Annual Plan Template](#), which allows you to easily capture and communicate your annual plan, as well as monitor progress.

Annual Plan

Customize	Add your logo and adjust colors as needed through the Slide Master
Org Overview	Slide 2 shows your overarching direction including the mission, or purpose, of your company and the vision, or long-term view of success. These set the foundation for the long term and annual plan, as all efforts should be aligned to the mission and a step towards achieving your vision.
Themes & Assumptions	Slide 3 is the context for your plan. What current market and/or organizational trends have led to the plan you have developed. These could be a combination of facts and opinions, a summation of top of mind leadership thoughts, built through exercises like a SWOT analysis, or in-depth market research. However you create them, allows your audience to understand how you arrived at your strategies. It also gives you guidance to when you need to adjust. When these factors change, it is time to review and adjust at your plan.
Long Term Strategies	Slide 4 is a simple articulation of your current strategies, the broad aims that you will be pursuing that will allow you to succeed in the current environment.

Monitoring Progress

Approach	Planning should not be a one time event, but something that is monitored and adjusted regularly. These slides will help you answer the questions you need to constantly review and adjust: <ol style="list-style-type: none"> Monthly: Are we doing what we said we would do? Quarterly: Are we seeing the results we want?
Action Plan	Slide 6 is the tactical action plan, that brings your broad strategies into simple steps. Ensure accountability by assigning one person and a date.
Measuring Progress	Slide 7 is your scorecard, measuring the goals associated to your strategies. Update the current at least quarterly and adjust your tactics as needed.

For help building, implementing, or managing your plan, reach out to us at LuminariesConsulting.com.