

Guide to Planning Your Annual Report



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Annual reports are so much more than just a collection of numbers and data. They are a chance to tell your organization's story and showcase your achievements, growth, and impact over the past year.

Using over twenty years of experience helping clients compile, streamline, and create their annual reports, PPR Strategies has collected our best advice and tips just for YOU!

From gathering data to designing a visually appealing document, an annual report process requires careful planning and detailed execution. While all reports cater to the industry and specific considerations of their organization, this guide provides general insights to help you plan your approach and get the best results for your investment.

Key Starting Blocks To Consider

Know Your Audience

Who are your stakeholders and what information will they find most impactful? Think through your audience and tailor the report's information to best resonate with their values.

Create a Clear Goal

What do you want your audience to walk away with? Understanding your desired outcomes can help keep efforts focused throughout the process. Decide with your team what is the main goal of the annual report.

Choose a Direction

What are the core messages that you want to convey in the report? If your organization has experienced growth in one sector, centering your theme around growth can help you streamline your narrative throughout.

Determine Your Resources

Determine what resources (financial and otherwise) you need to create your annual report. If you need an extra hand, engage an outside vendor for support.

Outline a Structure

Once you know your goals and core focus, outline the rest of the metrics, data, and topics you want to address. Keep the flow of information logical to guide your reader through the story of your year.

Set a Timeline

Determine when you need to have the annual report in hand and work backwards to determine milestones that should be met for info gathering, writing, and editing. Be sure to consider your print window if you will be making physical copies.

A photograph showing several hands of different skin tones stacked together in a supportive gesture, with a watch visible on one of the wrists. The image is overlaid with a teal gradient.

Year-round Information Gathering

Adopting a year-round information-gathering strategy is one of the most effective ways to save time as you prepare to publish your annual report.

Keep a running record of major projects, data, events, and other information!

Save everything your team does! If your organization doesn't create monthly or quarterly reports, keep a running list of important organization milestones, initiatives, events, and other crucial information that is a "must include" for an annual report.

Whether it's a spreadsheet, email chain, or a folder of flyers and reports, having a record of all your accomplishments throughout the year will make crafting your annual report much easier than starting from scratch when it comes time to draft!

Start looking at statistics NOW.

Collecting impactful data can be one of the most effective ways for your organization to show its impact to readers, but it can be challenging if you wait to pull the data all at once. Monthly data pulls can not only help your team prepare for your annual report but also help your team track the results of their efforts on a shorter-term scale.

At PPR, we maintain a constantly updated Google Sheet filled with our top stats, metrics, and projects. This approach helps us easily track and showcase our progress when compiling our annual report.

A yellow sticky note with a torn bottom edge, featuring a blue and green patterned tab at the top left.

P.S. Don't forget pictures!

Have a team member who loves taking photos? Ask them to be your team's designated photographer! Get some snaps at all your big events, business visits, and other important days. Set up a shared folder where all team members can contribute.



Year-round Information Gathering

Make sure your website is up-to-date.

For many readers, your annual report serves as an introduction to your website, where they can delve deeper into your organization and engage with your team. It's crucial that the information on your site is accurate and complete! This includes staff and board members, your mission, vision, values, current projects, and more.

Think through your team roles.

No one understands a project better than the team member(s) who brought it to life. When determining who will compile information for your annual report, consider dividing the work based on each team member's familiarity with different topics. By taking a "divide and conquer" approach, you can ensure that the sections are covered by the most knowledgeable individuals and help share the workload needed to pull all the data together.

Consider your digital strategy.

Annual reports are a labor of love, demanding considerable time and data to assemble. Before you kick off the project, brainstorm how you will share the document. Are you going to a conference? Consider making print copies! Looking to gain widespread reach online? Designate a page on your website where the current and future digital reports can live. Coming up with an effective plan is vital to strategizing where and when to share.

Consider extra help.

No organization is an island. Pulling in an outside partner can help you streamline all this information into one beautiful, concise document that allows your organization to tell its story with impact and energy!

Running Out of Time?

We don't all have the luxury of planning months in advance for a project of this size. If you're down to the eleventh hour, here is a quick checklist of places to look for information to add to your report:

Top Seven Places to Find Content For Your Annual Report

- ☐ **Strategic plans.** This may spark some ideas for content.
- ☐ **Reports.** What reports has your organization compiled this year? Incorporate this research into your annual report.
- ☐ **Newsletters and other email marketing campaigns.** Pull success stories, events, and initiatives to include in the year's highlights.
- ☐ **Presentations.** Incorporate information from your board or stakeholder presentations.
- ☐ **Calendars.** Check for events, conferences, webinars, ribbon cuttings, etc. that your team attended.
- ☐ **Website Analytics.** Review past blogs for inspiration on what to include in your report and use performance metrics to share any impressive numbers in your report.
- ☐ **Social Media.** What did you share on social this year? Use your posts and stories to find pictures for the report.



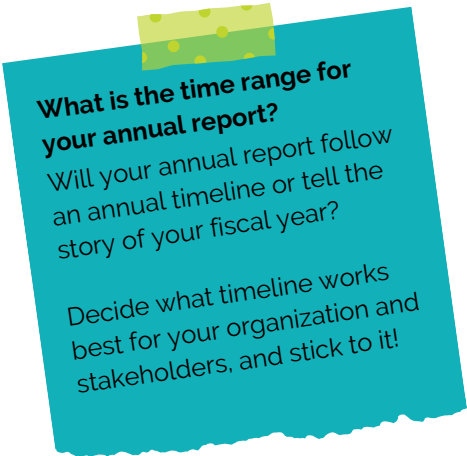
Blending Data and Story

Your annual report isn't just a place to list statistical data, percentages, and numbers. *It's an opportunity to tell a story!*

When thinking about the story you want to tell your stakeholders, consider incorporating the elements below to enrich your narrative and add valuable perspective to the impressive data you're presenting.

Give the Necessary Background Information

Are your stakeholders familiar with the details of your community? For those who live outside your area, it can be beneficial to add background data—like population size, median income, median age ranges, and more—to help add perspective to the rest of your report.



What is the time range for your annual report?

Will your annual report follow an annual timeline or tell the story of your fiscal year?

Decide what timeline works best for your organization and stakeholders, and stick to it!

Utilize Testimonials and Quotes

Hearing directly from individuals who have benefited from your programs is unmatched in demonstrating your organization's impact.

Reach out to business owners for some quick quotes, and incorporate them into your report and other digital marketing efforts.

Let Everyone Know What You're Up To

From big milestones (like new programs and conferences!) to yearly updates on social media campaigns, ongoing initiatives, and more, stakeholders want to know what you're up to!

Breaking down your calendar by month and creating categories can be a great way to start telling the story of how your organization is in the community.



Blending Data and Story

Present Your Data in a Visually Compelling Way

Despite many of us not being fond of math class as kids, people are drawn to numbers. When sharing your story, using numerical data can powerfully demonstrate your organization's outcomes, including:

- Number of businesses you've supported
- Loans administered
- Employment rates
- and more!

To help your readers not only engage with the data, but quickly interpret its meaning, utilize graphs, charts, and other visual elements.

Use Photographs To Your Advantages

Give your audience a *literal* way to see the awesome things you've accomplished this year!



Keep Your End Use In Mind!

When taking or finding pictures for your report, remember that high-resolution images are best for print! If you plan to host a digital version on your website, determine where the document will be located and implement any necessary navigation or major changes well in advance.



Ready For Review?

Before your report gets to the review stage, designate a few team members that have the most all-encompassing knowledge of your organization to lead the review efforts.

A photograph of three people—two women and one man—collaborating around a laptop. The image is overlaid with a teal gradient.

How to Share and Repurpose Your Annual Report

Sharing Your Annual Report

Make the most of multiple communication channels and formats! While print copies provide a tangible reminder of your organization's achievements and are perfect for distribution at events, a digital version can extend your reach to an entirely new audience.

Ways to Repurpose Your Annual Report

You've spent a lot of time pulling together the report—don't let the information live and die in its pages! If your content is important enough to make it on an annual report, it is worth sharing in other ways, too. Repurpose the information into your other marketing efforts to make the most of your investment.

Website Content

Utilize the compelling quotes you've collected from business owners to create a video for your website or social media. Also, consider integrating testimonials across various pages of your website, where they can enhance the content.

Social Media

To engage your followers, create a social media series sharing some of the top highlights, stats, or quotes from your annual report. Link the posts to the full report to guide readers to explore more about your organization.

Email Marketing

Highlight or call-out one piece of data from your report in your monthly newsletter to keep your organization's overall impact top-of-mind for readers throughout the year.

Media Pitching

Pull out some of your best data for a press release on what your organization has been able to accomplish this year.

Annual Report Checklist

Initial Planning

- ☐ Determine your primary audience
- ☐ Create a goal for your report
- ☐ Choose a theme or core message for your report
- ☐ Determine a list of resources that will help you accomplish the report
- ☐ Create an outline for your information
- ☐ Determine a timeline for completion

Year-Round Tracking

- ☐ Keep a running list of events your organization has held throughout the year
- ☐ Create a shared folder for information and photos
- ☐ Update your website with the most current information
- ☐ Determine how you will be sharing your report (digital, print, or both)
- ☐ Reach out to potential vendors for quotes on support, if necessary
- ☐ Keep a log of testimonials received over the year to include throughout the report

Repurpose Your Annual Report

- ☐ Pull engaging stats to incorporate into website copy
- ☐ Create a social media series featuring data from your report
- ☐ Feature testimonials from the report in your marketing efforts
- ☐ Pull your best data into a press release that shares your accomplishments this year



Thank you for enjoying this guide from PPR Strategies!

The Guide to Planning Your Annual Report was created by the team at PPR Strategies.

We're an economic development consulting agency specializing in communications, strategic planning, and implementation. Bringing an integrated approach and imaginative execution, we help elevate places through the lens of economic development, business support, and investment. With purposeful strategy and palpable energy, our solutions broaden outreach and revenues.

Ready to take your story to the next level? Contact sandy@pprstrategies.com to schedule your free 15-minute consultation.