

Annual Planning

What is Annual Planning?

Annual Planning is a facilitated activity that should be carried out annually by all management teams as part of the Annual Corporate Planning Process for the organisation. If your organisation doesn't have an Annual Corporate Planning Process that requires you to do this, do it anyway.

Annual Planning is the activity by which a management team identifies, lists and prioritises its projects for the coming 12 months. By 'management team', we mean a leader and their direct reports, i.e. a natural work group of managers responsible for a specific team and area of activity.

When to do Annual Planning

- Every management team should carry out Annual Planning once a year as part of the Annual Corporate Planning Process. This is a cascade activity linked to the development of organisational strategy.
- New management teams should carry out Annual Planning as soon as they are formed

Who should attend?

- The leader of the management team concerned
- Direct reports
- Any other key managers with large teams or areas of responsibility

Some logistics

- Typical duration from ½ a day for small management teams with relatively few projects up to 2 days for senior teams with many projects undertaking this activity for the first time. If unsure, allow one day.
- Annual Planning gets easier and quicker year-on-year

Typical contents

- (1) Leader Speaks
- (2) Briefing Sessions as appropriate
- (3) Identify all the projects that need to be carried out over the next 12 months
- (4) Prioritise
- (5) Allocate a Champion and Project Leader
- (6) Identify timescales
- (7) Identify who needs to be involved
- (8) Plan how the resulting projects will be monitored and steered
- (9) Start work on remits

Using a Facilitator

Annual Planning is a rigorous intellectual process that requires thought and concentration. The leader needs to be in 'full leadership mode' providing clear direction to the team and it is important that priorities are clearly understood and thought through. Therefore having a **UIMPROVE** Facilitator to run the day is essential. The Facilitator will:

- (1) Meet with the leader beforehand to plan the event
- (2) On the day, run the event working closely with the leader
- (3) Work the tools, in particular construction of the Project Steering Grid
- (4) Meet with the leader afterwards to review and make recommendations