



FOR WORK

Annual Business Review (ABR) Presentation Worksheet

Our Annual Business Review (ABR) Presentation Worksheet helps you focus your message and streamline your presentation. It helps you organize your thinking and provide clear examples that support your points. It clarifies your vision and goals for the company and unities your audience in working to achieve them. Print out our worksheet and use it to make your presentation as short and impactful as possible.

INTERNATIONAL  PAPER

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Worksheet

ABR Presentation Worksheet

This preparation checklist can help you streamline your presentation and make it more effective. Before you prepare your presentation, take a few moments to ask yourself some important questions.

What You Will Need

Hammermill® Copy paper, 20lb

Background

1. What is the Story?

Looking back over the past year, and while thinking of the company's future, what is the overarching theme? Have you presented your company goals in the past? If so, did you make progress toward achieving them? If you haven't presented your company's goals in the past, this is the time and place to do it. What is the central idea you want your audience to know? What is your vision for the company?

2. What Does Your Audience Want to Hear?

What are your audience's needs and concerns? What are the topics they want to hear about? Topics might include job security, growth, acquisitions, pay, etc. To grab and hold your audience's attention, you will want to speak to their concerns early in your presentation.

3. What do You Need to Tell Them?

What is important that your audience know? Are there big changes coming? Have there been setbacks or achievements that need to be addressed? Are there events in the world that impact your company's prospects for future achievement?

I. Intro: Our Journey

A REVIEW OF THE PAST YEAR

Use your Intro to grab your audience's attention. Tell them what you will be talking about and why it is important to them. Then set out the presentation's overarching theme. Use your answers to the three questions above to help you craft this section.

Why should they listen?

[From #2 above]

What subjects will you be covering?

These should answer or relate to the audience concerns above as well as any topics you need them to know about from Question #3.

What is the central theme of the presentation?

What is important that your audience know? Are there big changes coming? Have there been setbacks or achievements that need to be addressed? Are there events in the world that impact your company's prospects for future achievement?

II. What We Did

A REVIEW OF THE PAST YEAR

Isolate the three most consequential accomplishments or events of the past year. These achievements should align with your goals, demonstrating that you are building toward the future. For each one, provide proof points such as financial results, sales figures or other evidence that supports your claim. Then, single out an individual or team that was most responsible for the success and explain as quickly and clearly as possible how they did it.

Achievement #1 _____

Proof Point _____

Team/Individual Responsible _____

What They Did _____

Achievement #2 _____

Proof Point _____

Team/Individual Responsible _____

What They Did _____

Achievement #3 _____

Proof Point _____

Team/Individual Responsible _____

What They Did _____

III. Where We Are

THE RESULT OF THE ACHIEVEMENTS IN SECTION II

Turning from the past to the present, outline the impact of the past year's achievements. How do they help position your company to achieve its goals going forward? Is there any good news to share?

How does Achievement #1 from Section II prepare you for achieving your goals?

How does Achievement #2 prepare you for achieving your goals?

How does Achievement #3 prepare you for achieving your goals?

IV. Where We Are Going

THE PLAN FOR THE YEAR AHEAD

Now, looking toward the future, how will the company realize the vision you presented in the Intro? What are the specific plans that you want your audience to bring to life? What are the goals for the year ahead?

Goal 1

Goal 2

Goal 3
