[Company name]

How to use this document: delete this paragraph before saving, sharing, or circulating it. Every part shown in blue is yours to replace: type your own details over each blue [field] until no blue remains. Then select all (Ctrl+A) and set the font colour to the same dark colour throughout. What is left is your finished document.

Annual Business Report

[Company name] The year in review for [Company name]: what the business did, how it performed, what it achieved, and where it is heading. Prepared for [Board, shareholders or management team].

1. Report details.
Company: _____ **Financial year:** _____
Year end date: _____ **Prepared by:** _____
Prepared for: [Board, shareholders or management team] **Report date:** _____
2. A message from [Name and role]**.** [Enter a short message from the most senior person in the business: the year in a few sentences, and the outlook.]

3. The year at a glance.
(1) Revenue: This year: _____ Last year: _____ Change: _____ Comment: _____
(2) Gross profit: This year: _____ Last year: _____ Change: _____ Comment: _____
(3) Operating profit: This year: _____ Last year: _____ Change: _____ Comment: _____
(4) Cash at bank: This year: _____ Last year: _____ Change: _____ Comment: _____
(5) Customers: This year: _____ Last year: _____ Change: _____ Comment: _____
(6) Employees: This year: _____ Last year: _____ Change: _____ Comment: _____
4. Financial summary.
(1) Revenue: This year: _____ Last year: _____ Change: _____ Comment: _____
(2) Cost of sales: This year: _____ Last year: _____ Change: _____ Comment: _____
(3) Gross profit: This year: _____ Last year: _____ Change: _____ Comment: _____
(4) Operating costs: This year: _____ Last year: _____ Change: _____ Comment: _____
(5) Operating profit: This year: _____ Last year: _____ Change: _____ Comment: _____
(6) Profit after tax: This year: _____ Last year: _____ Change: _____ Comment: _____
(7) Cash at bank: This year: _____ Last year: _____ Change: _____ Comment: _____
Financial commentary: [Enter commentary on the financial results: what drove revenue and profit, how cash moved during the year, and any one-off items.]

5. Achievements this year.
[Enter an achievement, with the result it produced] [Enter an achievement, with the result it produced]
[Enter an achievement, with the result it produced] [Enter an achievement, with the result it produced]
6. Challenges and how we responded.
(1) Challenge: What happened: _____ How we responded: _____ Outcome: _____
(2) Challenge: What happened: _____ How we responded: _____ Outcome: _____
(3) Challenge: What happened: _____ How we responded: _____ Outcome: _____
7. Our people. [Enter a short section on the team: headcount, training, recognition, and any changes in leadership or structure.]
(1) Employees at year end: This year: _____ Last year: _____ Comment: _____
(2) New joiners: This year: _____ Last year: _____ Comment: _____
(3) Leavers: This year: _____ Last year: _____ Comment: _____
(4) Training days: This year: _____ Last year: _____ Comment: _____

8. Customers and markets. [Enter a short section on customers and markets: who the business served, what changed, and where demand is heading.]
9. Outlook for next year. [Enter the outlook: the plan for next year, the targets, the main risks, and the opportunities the business will pursue.]
[Enter a priority for next year] [Enter a priority for next year] [Enter a priority for next year]
10. Thank you. Thank you to our customers, our suppliers, and everyone at [Company name] who made this year possible.
Sign-off.
Prepared by: _____ **Reviewed by:** _____
Date: _____ **Signature:** _____