



Product Webinar

Annual work plan in BoardPro

Ditch the spreadsheets and visualise your entire year's workload in one place.

A screenshot of the BoardPro meeting calendar interface. It shows a vertical list of meeting cards for the year 2026. The top card is for January 2026 with the item 'Set meeting calendar for the year'. The second card is for February 15th 2026, showing a list of items: 'Strategic review workshop - all Directors in person', 'Annual Plan approval' (highlighted in a light blue bar), and 'Review HR policies with Graham'. The interface includes month/year dropdowns, 'Link Meeting' buttons, and a calendar icon with a '+15' indicator.

January 2026 ▾

+ Link Meeting

- Set meeting calendar for the year

February 15th 2026 ▾

A G T D +15 📅 ⋮

- Strategic review workshop - all Directors in person
- Annual Plan approval
- Review HR policies with Graham

March 2026 ▾

+ Link Meeting

April 2026 ▾

+ Link Meeting

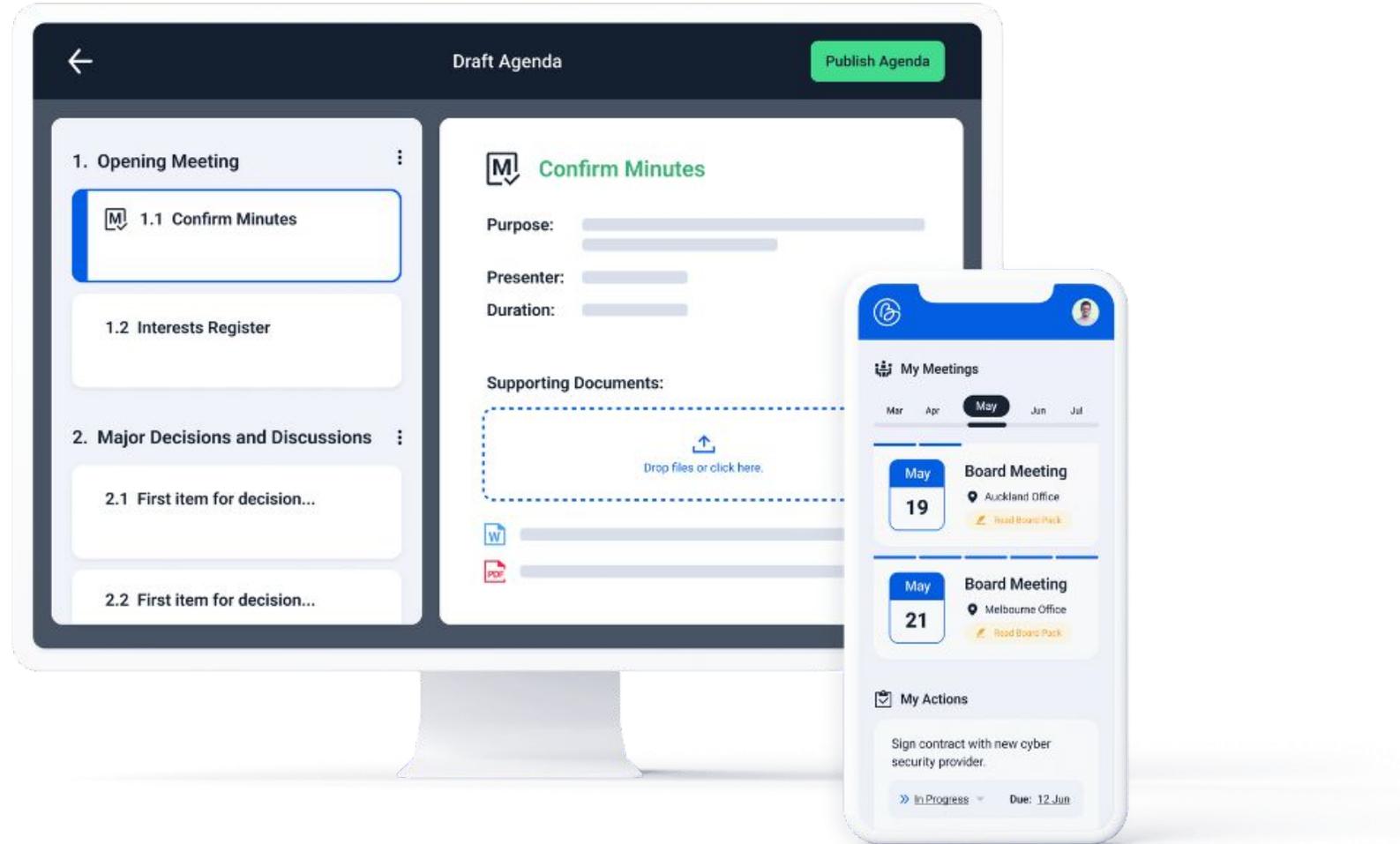
May 2026 ▾

+ Link Meeting

June 2026 ▾

+ Link Meeting







**Making the fundamentals of
governance free and
easy to implement**



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Explore free governance resources for growing your organisation and adopting good governance practises. From meeting minutes templates to CEO reporting templates, our comprehensive guides and templates will cover your governance and business essentials.

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sent to you. Sit back, relax and
enjoy the conversation**



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Agenda

01

Why a robust annual work plan is critical

02

The problem with the status quo

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Introduction to annual work plan in BoardPro

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Product demo from our product team

05

Availability

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Q&A





Why a robust annual work plan is critical



The Strategic Roadmap

A rolling 12-month schedule mapping out all critical board activities



The Balance

Ensures you meet fiduciary duties (audit, risk, policy) without squeezing out strategic discussions.



The Cadence

Prevents agenda overload by spreading workload evenly across the year.



The problem with the status quo

Relying on manual tools can turn strategic planning into a constant administrative burden.



Static Documents

Version control and document management issues.



The "Copy-paste" Risk

High chance of human error when moving months or reformatting.



Operational Disconnect

Project tools are too granular; documents and spreadsheets are too rigid.



Siloed access

Stakeholders lack access to view or prepare for upcoming work

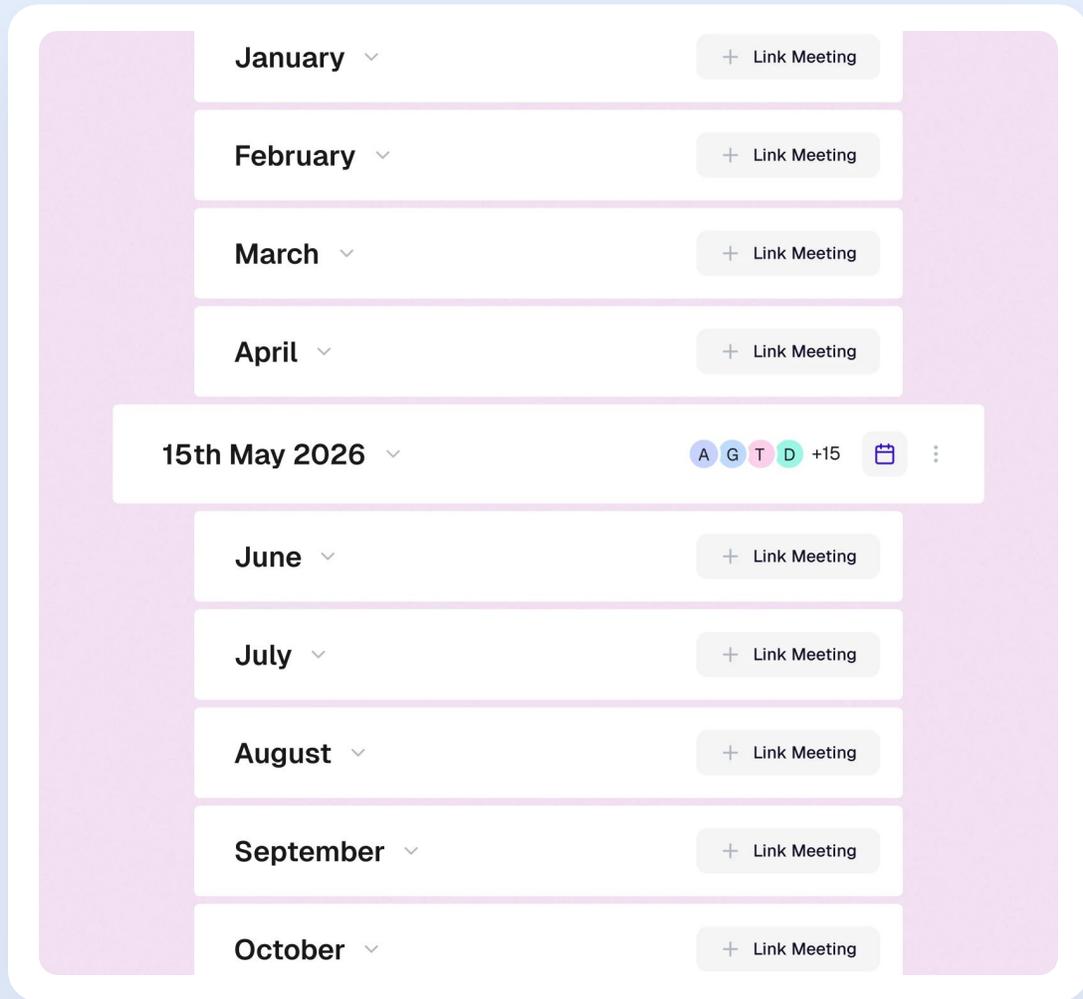


Introducing Annual work plan from BoardPro

Transform your annual work plan from a static document into a living roadmap that balances compliance obligations with strategic priorities, ensuring nothing gets lost in version control.

The screenshot displays a calendar interface with two dates highlighted:

- 15th May 2026** (with a dropdown arrow):
 - Curriculum and programme overview
 - Student attendance and wellbeing data review
 - Risk management framework review
- 24th June 2026** (with a dropdown arrow):
 - Mid-year budget revision
 - Principal's mid-year performance check-in (highlighted in blue with a mouse cursor and a plus icon to its right)
 - Policy review cycle (Group A)



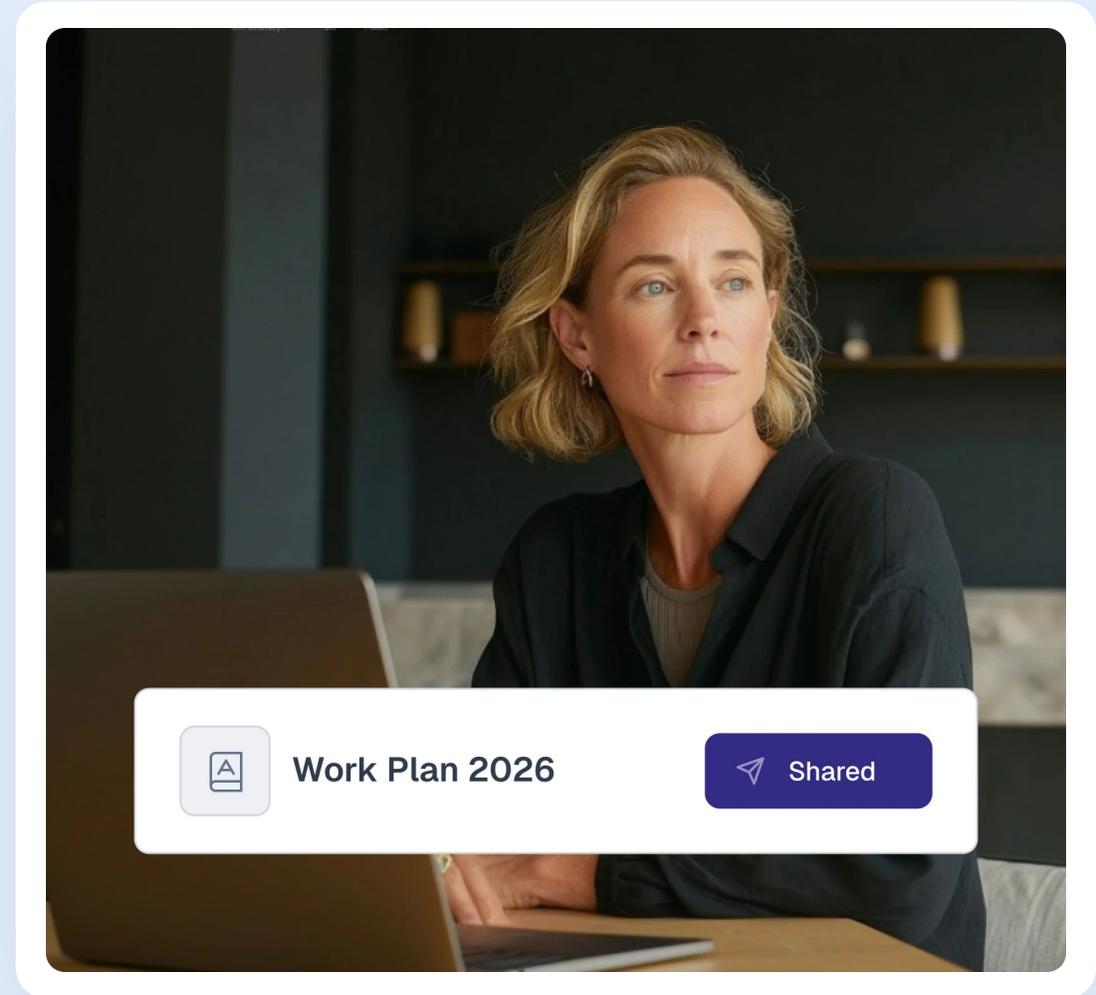
Standalone annual visualisation

With a dedicated 12-month view (calendar or financial year), you can assess your strategic workload and compliance coverage at a glance, so you don't get bogged down in meeting-specific tactical details.



A dynamic, living roadmap

Eliminate the "which version is this?" confusion. Keep your board on the same page with a live view that updates instantly, replacing static spreadsheets and endless email threads.





Integrated meeting context

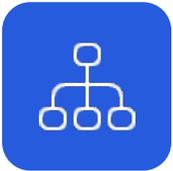


Bridge the gap between strategy and execution. View high-level goals for specific meetings, giving you immediate visibility into when the work is happening and who is involved.





Start with a proven structure



Don't start your annual work plan from a blank page. Load a pre-built, best-practice template, or upload your own document or spreadsheet to establish a solid governance work plan structure in seconds.

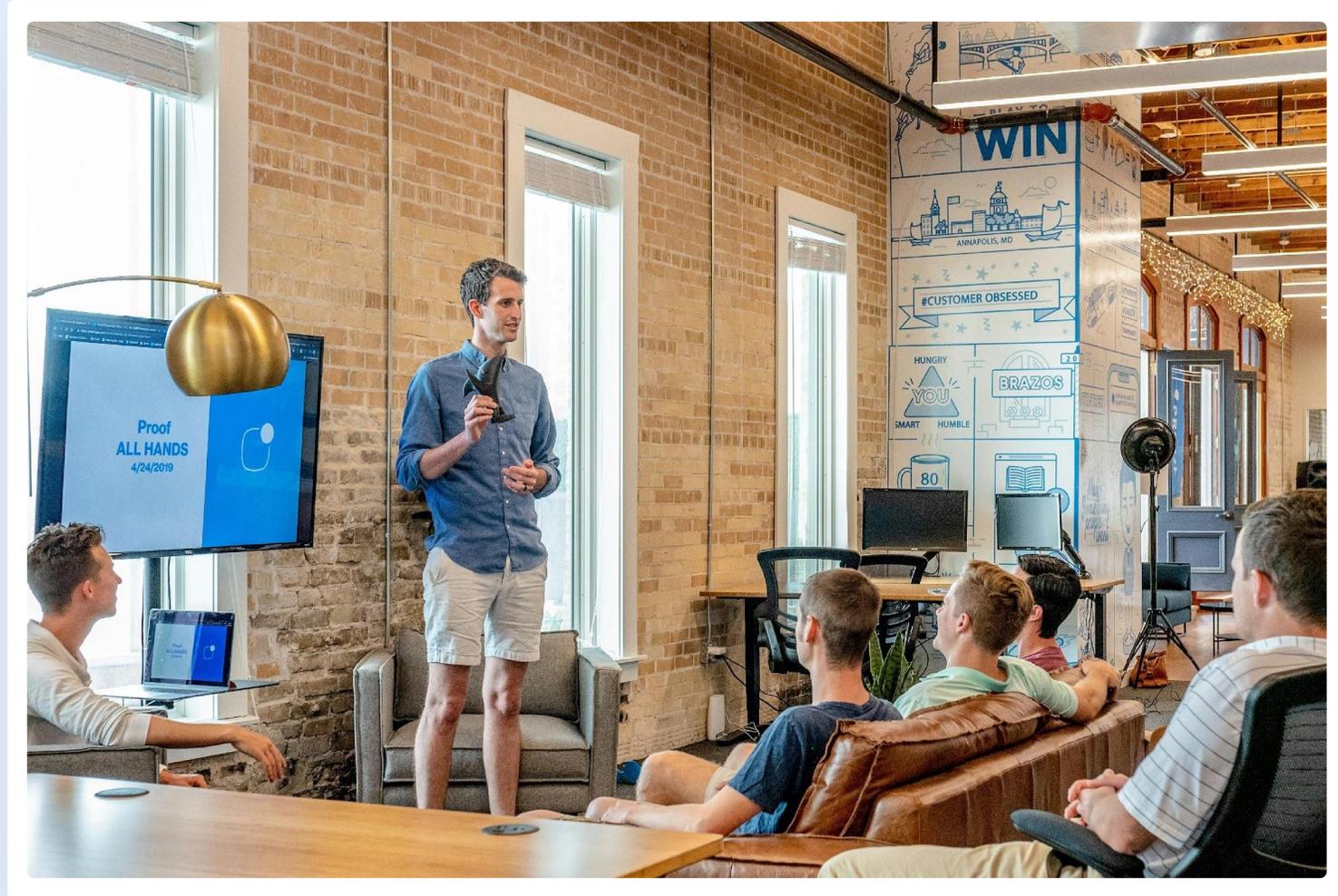
Add your Work Plan

- Create New
- Use a template
- Import

File format icons: Excel, PDF, Word, M+



Live product demo





Pathways to start

Existing customer?	New to BoardPro?	Talk to an expert
Try it now	Start for free	Book a walkthrough
Log in to BoardPro and head to annual work plan.	Start a 14-day free trial (no credit card required).	Want a tailored tour for your board or committee?
Start from scratch, upload a template or generate from best practice	Get full access to annual work plan.	Book a 1-on-1 session with our team to discuss your specific goals.

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