

BUDGETING FOR NON-FINANCIAL MANAGERS



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TRAINING CENTER



Introduction

Budgeting for Non-Financial Managers Training Course gives managers from every function the financial confidence to plan, justify, and control a budget. Participants work through the budget cycle, cost and revenue estimation, reading financial statements, budget submission, and variance review in plain language. The programme focuses on the decisions managers actually make, from headcount requests to monthly spending checks. As a result, learners gain working financial literacy without an accounting background. Furthermore, the course strengthens estimation discipline, justification quality, and the reporting that keeps departmental spending under control.

Budgeting for Non-Financial Managers Course Objectives

- Explain the budget cycle from planning to approval and review.
- Read the income statement, balance sheet, and cash flow statement in simple terms.
- Distinguish capital and operating expenditure and their treatment.
- Classify costs as fixed, variable, direct, and indirect.
- Estimate costs and revenue using historical data and documented assumptions.
- Build an operating budget for a department or project.
- Write justification notes and business cases for new spending.
- Apply break-even and cost-volume-profit thinking to decisions.
- Monitor budget execution and explain variances clearly.
- Apply commitment control, approval limits, and spend discipline.

Course Methodology

- Interactive sessions built on real departmental budgeting situations.

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- Workshops on cost estimation, assumption setting, and budget templates.
- Group exercises on justification writing and variance explanation.
- Hands-on practice with budget schedules, break-even models, and variance reports.
- Simulation of a budget review meeting and a spending reduction request.
- Facilitator coaching and peer review on personal budget plans.

Who Should Take This Course

- Managers and heads of department without a finance background.
- Project and programme managers managing budgets.
- Team leaders responsible for cost centres.
- Operations, marketing, HR, and IT managers.
- Administrators with budget preparation duties.
- Professionals moving into roles with budget accountability.

Budgeting for Non-Financial Managers Course Outlines

Day 1: Financial Basics in Plain Language

- Why managers need budgeting skills and what it changes.
- The budget cycle from planning to approval and review.
- Reading the income statement and what profit really means.
- Reading the balance sheet and what assets and liabilities show.
- Reading the cash flow statement and why cash differs from profit.
- Capital versus operating expenditure explained simply.
- Case discussion: a manager whose spending caused a year-end crisis.





Day 2: Understanding and Estimating Costs

- Cost classification: fixed, variable, direct, and indirect.
- Cost behaviour and the relevant range without the jargon.
- Estimating costs from historical data and supplier quotes.
- Applying inflation, price, and currency assumptions.
- Contingency, risk, and the cost of being wrong.
- Break-even and cost-volume-profit thinking made practical.
- Workshop: estimating costs for a departmental activity.

Day 3: Building the Departmental Budget

- Types of budget: operating, capital, and cash budgets.
- Incremental, zero-based, and rolling budgeting explained.
- Structure of a departmental budget and standard schedules.
- Estimating revenue, income, or cost recovery.
- Headcount, overtime, and non-pay budget lines.
- Assumptions documentation and version control.
- Exercise: preparing a departmental budget with schedules.

Day 4: Justifying and Defending the Budget

- Writing a justification note for new spending.
- Building a simple business case: costs, benefits, and risk.
- Prioritising requests when the budget is tight.
- Cost-benefit and value-for-money reasoning in plain terms.
- Preparing slides and a narrative for a budget review.

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- Presenting and answering questions in a budget meeting.
- Simulation: defending a budget request before a review panel.

Day 5: Monitoring, Variances, and Cost Control

- Monthly budget versus actual reporting and what to look for.
- Reading a variance report and identifying the real cause.
- Separating price, volume, and timing effects simply.
- Commitment control, purchase orders, and approval limits.
- Corrective action: slowing spend, reallocating, or re-forecasting.
- Working effectively with the finance team.
- Capstone: presenting a departmental budget and monitoring plan.

Conclusion

By successfully completing Budgeting for Non-Financial Managers, participants will gain a practical command of the budget cycle, cost estimation, budget preparation, and variance review in everyday language. They will acquire skills in justification writing, cost control, and financial reporting that make departmental budgets credible and controllable. Gentex Training Center designs the programme to help managers plan and defend budgets with confidence.

FAQs





Q1 What is the "Budgeting for Non-Financial Managers" course about?

It gives managers from every function the financial confidence to plan, justify, and control a budget. The course spans financial basics in plain language, understanding and estimating costs, building the departmental budget, justifying and defending the budget, and monitoring, variances, and cost control.

Q2 What are the key benefits of the "Budgeting for Non-Financial Managers" course?

You gain working financial literacy without an accounting background. The course improves cost estimation, strengthens your case for new spending, sharpens cost control habits, and gives you the confidence to explain variances and defend figures in a budget review.

Q3 What skills will I gain from the "Budgeting for Non-Financial Managers" course?

You will develop four core skills: reading financial statements and understanding budget structure, cost classification and estimation, budget preparation and justification writing, and budget monitoring with variance analysis and cost control.



Q4 What tools, methods, or standards are covered in the "Budgeting for Non-Financial Managers" course?

The course covers the budget cycle, the income statement, balance sheet, and cash flow statement, capital versus operating expenditure, cost classification and behaviour analysis, historical and quote-based estimation, inflation and price assumptions, contingency and sensitivity planning, break-even and cost-volume-profit analysis, operating, capital, and cash budget structures, incremental, zero-based, and rolling budgeting, budget schedules and assumption documentation, justification notes and simple business cases, cost-benefit and value-for-money reasoning, budget versus actual reporting, variance identification, commitment control, purchase orders, and approval limits.

Q5 How is the "Budgeting for Non-Financial Managers" course applied in real-world practice?

Participants apply it to real work such as estimating costs for a departmental activity, preparing a budget with supporting schedules, writing a justification for new spending, reading a monthly variance report, and defending a budget request in a review meeting. The same methods support corrective action planning and working with the finance team.