

# **CERTIFIED BUDGET ANALYST**



**GENTEX<sup>®</sup>**  
TRAINING CENTER



## Introduction

Certified Budget Analyst Training Course prepares finance professionals to build, scrutinise, and defend budgets with evidence rather than instinct. Participants work through the budget cycle, cost and revenue estimation, analytical techniques, variance investigation, and budget reporting as one connected discipline. The programme gives analysts the tools to test assumptions, challenge numbers respectfully, and explain results clearly to decision-makers. As a result, learners gain an analytical method they can apply to every budget round. Furthermore, the course strengthens rigour, statistical literacy, and the reporting standards that make budget analysis trustworthy.

## Certified Budget Analyst Course Objectives

- Explain the budget cycle from call for estimates to approval and review.
- Apply incremental, zero-based, activity-based, and performance budgeting.
- Estimate costs using regression, trend analysis, and cost behaviour models.
- Build revenue estimates with quantitative and qualitative forecasting methods.
- Apply cost-benefit analysis and cost-effectiveness analysis to requests.
- Conduct break-even and cost-volume-profit analysis for decisions.
- Analyse variances using price, volume, mix, and efficiency decomposition.
- Apply root cause analysis and the 5 Whys to budget deviations.
- Build budget models with scenario and sensitivity testing.
- Prepare budget reports, dashboards, and analytical notes for decision-makers.

## Course Methodology

- Interactive sessions built on budget analysis cases and datasets.
- Workshops on estimation techniques, CBA, and variance decomposition.
- Group exercises on assumption testing, scenario design, and analytical notes.

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- Hands-on practice with regression basics, budget models, and variance reports.
- Simulation of a budget challenge session and an analytical review.
- Facilitator coaching and peer review on personal analytical frameworks.

## Who Should Take This Course

- Budget analysts and planning analysts.
- Finance officers and management accountants.
- Cost analysts and performance specialists.
- Departmental budget coordinators.
- Internal auditors reviewing budget processes.
- Consultants advising on budgeting and analytical capability.

## Certified Budget Analyst Course Outlines

### Day 1: The Budget Cycle and Analyst's Role

- What a budget analyst does and where value is added.
- The budget cycle from call for estimates to approval and review.
- Incremental, zero-based, activity-based, and performance budgeting compared.
- Policy guidance, ceilings, and resource envelopes.
- Roles, deadlines, and submission standards.
- Ethics, independence, and integrity in budget analysis.
- Case discussion: a budget approved on assumptions nobody tested.

### Day 2: Cost and Revenue Estimation Techniques

- Cost classification and cost behaviour analysis.



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- Historical trend analysis and base-year adjustment.
- Simple regression and driver-based estimating basics.
- Inflation, indexation, and price adjustment methods.
- Revenue estimation: quantitative and qualitative approaches.
- Contingency, risk, and sensitivity in estimates.
- Workshop: building a cost estimate with regression support.

## Day 3: Analytical Techniques for Budget Decisions

- Cost-benefit analysis and net present value basics.
- Cost-effectiveness analysis and cost-utility comparison.
- Value for money assessment: economy, efficiency, effectiveness, and equity.
- Break-even and cost-volume-profit analysis for proposals.
- Relevant costing and incremental analysis for decisions.
- Weighted scoring models for prioritisation.
- Exercise: appraising three competing budget bids.

## Day 4: Variance Analysis and Investigation

- Budget versus actual reporting and materiality thresholds.
- Variance classification: favourable, adverse, controllable, and uncontrollable.
- Price, volume, mix, and efficiency variance decomposition.
- Root cause analysis and the 5 Whys applied to budget deviations.
- Distinguishing one-off effects from structural trends.
- Re-forecasting and revised outturn preparation.
- Simulation: investigating a significant overspend and reporting findings.





## Day 5: Modelling, Reporting, and Analytical Governance

- Building budget models with clear structure and documentation.
- Scenario and sensitivity testing in budget models.
- Version control, assumption logs, and model review.
- Preparing analytical notes, dashboards, and briefing packs.
- Presenting analysis to decision-makers and handling challenge.
- Analytical governance, quality assurance, and audit readiness.
- Capstone: presenting a complete budget analysis report.

## Conclusion

By successfully completing Certified Budget Analyst, participants will gain a practical command of estimation techniques, appraisal methods, variance investigation, and budget modelling. They will acquire skills in cost-benefit analysis, statistical estimation, decomposition of variances, and analytical reporting that make budget numbers defensible. Gentex Training Center designs the programme to help analysts test, explain, and improve the numbers a budget rests on.

## FAQs



## Q1 What is the "Certified Budget Analyst" course about?

It prepares finance professionals to build, scrutinise, and defend budgets with evidence rather than instinct. The course spans the budget cycle and the analyst's role, cost and revenue estimation techniques, analytical techniques for budget decisions, variance analysis and investigation, and modelling, reporting, and analytical governance.

## Q2 What are the key benefits of the "Certified Budget Analyst" course?

You gain an analytical method you can apply to every budget round. The course improves estimation accuracy, strengthens appraisal of competing bids, sharpens variance investigation, and gives you reporting and modelling standards that make your analysis credible and repeatable.

## Q3 What skills will I gain from the "Certified Budget Analyst" course?

You will develop four core skills: cost and revenue estimation with statistical techniques, budget appraisal using cost-benefit and cost-effectiveness analysis, variance analysis and root cause investigation, and budget modelling with analytical reporting and governance.



## Q4 What tools, methods, or standards are covered in the "Certified Budget Analyst" course?

The course covers incremental, zero-based, activity-based, and performance budgeting, cost classification and behaviour analysis, historical trend and base-year adjustment, simple regression and driver-based estimating, inflation and indexation methods, quantitative and qualitative revenue estimation, contingency and sensitivity planning, cost-benefit analysis and net present value, cost-effectiveness and cost-utility analysis, value for money assessment, break-even and cost-volume-profit analysis, relevant costing, weighted scoring models, variance classification and materiality thresholds, price, volume, mix and efficiency variance decomposition, root cause analysis and the 5 Whys, re-forecasting and revised outturn preparation, budget model documentation and assumption logs, scenario and sensitivity testing, and audit readiness standards.

## Q5 How is the "Certified Budget Analyst" course applied in real-world practice?

Participants apply it to real work such as estimating a departmental cost base, appraising three competing budget bids, investigating a significant overspend to its root cause, building a budget model with scenarios, and presenting an analytical note to a budget committee. The same methods support re-forecasting and value-for-money reviews.