

CORPORATE FINANCIAL PLANNING, BUDGETING & CONTROL



GENTEX[®]
TRAINING CENTER



Introduction

Corporate Financial Planning, Budgeting & Control Training Course connects the plan a company sets, the budget that funds it, and the controls that keep it on course. Participants work through financial planning, budget construction, resource allocation, commitment control, and variance review as one connected corporate routine. The programme links target setting with the internal control framework that makes targets enforceable. As a result, learners gain an integrated method rather than three separate disciplines. Furthermore, the course strengthens commercial judgement, control design, and reporting discipline that keeps corporate performance accountable.

Corporate Financial Planning, Budgeting & Control Course Objectives

- Explain the corporate planning cycle and its governance milestones.
- Apply incremental, zero-based, rolling, and driver-based budgeting.
- Build operating, capital, and cash budgets with documented assumptions.
- Forecast revenue, cost, and cash using quantitative and qualitative methods.
- Allocate resources across departments with defensible criteria.
- Apply the Balanced Scorecard and OKRs to planning and reporting.
- Design internal control frameworks with segregation of duties and approval limits.
- Apply commitment accounting, spend gates, and budget control routines.
- Analyse variances using price, volume, mix, and efficiency analysis.
- Apply financial governance, reporting, and audit-readiness standards.

Course Methodology

- Interactive sessions built on planning, budgeting, and control cases.

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- Workshops on budget construction, allocation criteria, and control design.
- Group exercises on variance investigation, reporting, and control review.
- Hands-on practice with driver-based budgets, control matrices, and variance reports.
- Simulation of a budget committee review and a control weakness investigation.
- Facilitator coaching and peer review on personal planning and control frameworks.

Who Should Take This Course

- Finance managers, controllers, and management accountants.
- Budget officers and planning specialists.
- Department heads accountable for budgets and control.
- Cost controllers and financial analysts.
- Internal control and internal audit professionals.
- Consultants advising on financial planning and control improvement.

Corporate Financial Planning, Budgeting & Control Course Outlines

Day 1: Corporate Financial Planning and the Planning Cycle

- The planning cycle from strategy to budget to control to review.
- Planning calendar, governance, and approval routes.
- Incremental, zero-based, rolling, and driver-based budgeting compared.
- Linking plans to strategy with the Balanced Scorecard and OKRs.
- Roles and responsibilities across finance and the business.



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- Behavioural traps: padding, sandbagging, and gaming.
- Case discussion: a plan with no control framework behind it.

Day 2: Budget Construction and Cost Planning

- Building the operating budget: revenue, cost of sales, and overheads.
- Capital budget preparation and investment appraisal basics.
- Cash budget preparation and working capital planning.
- Cost behaviour: fixed, variable, semi-variable, and step costs.
- Contribution margin, break-even, and cost-volume-profit analysis.
- Overhead allocation and cost recovery planning.
- Workshop: preparing an integrated budget for a business unit.

Day 3: Resource Allocation and Financial Decision Support

- Allocation principles: equity, effectiveness, and strategic fit.
- Allocation criteria and weighted scoring models.
- Cost-benefit analysis and value-for-money reasoning.
- Relevant costing for make-or-buy and outsourcing decisions.
- Capital appraisal: payback, NPV, IRR, and profitability index.
- Handling allocation disputes between departments.
- Exercise: allocating a constrained budget across competing requests.

Day 4: Financial Control Framework and Budget Execution



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- Internal control frameworks and control design principles.
- Segregation of duties, authorisation levels, and approval limits.
- Commitment accounting and obligation tracking.
- Spend gates, budget checks, and variance thresholds.
- Procurement controls and contract oversight.
- Fraud risk, anti-bribery expectations, and control testing.
- Simulation: investigating a control weakness and recommending fixes.

Day 5: Variance Review, Reporting, and Governance

- Budget versus actual reporting and monitoring cadence.
- Variance classification: favourable, adverse, and controllable.
- Price, volume, mix, and efficiency variance analysis.
- Root cause investigation and corrective action routines.
- Re-forecasting and rolling plan adjustments.
- Reporting financial performance to executives and the board.
- Capstone: presenting an integrated planning, budgeting, and control plan.

Conclusion

By successfully completing Corporate Financial Planning, Budgeting & Control, participants will gain an integrated command of the planning cycle, budget construction, resource allocation, and financial control design. They will acquire skills in control frameworks, commitment discipline, variance analysis, and governance reporting that keep corporate performance accountable. Gentex Training Center designs the programme to help professionals plan, fund, and control performance as one routine.





FAQs

Q1 What is the "Corporate Financial Planning, Budgeting & Control" course about?

It connects the plan a company sets, the budget that funds it, and the controls that keep it on course. The course spans corporate financial planning and the planning cycle, budget construction and cost planning, resource allocation and decision support, the financial control framework and budget execution, and variance review, reporting, and governance.

Q2 What are the key benefits of the "Corporate Financial Planning, Budgeting & Control" course?

You gain an integrated method rather than three separate disciplines. The course improves budget construction and assumptions, makes allocation criteria defensible, strengthens control design and commitment discipline, and gives you reporting routines that make performance visible and correctable.

Q3 What skills will I gain from the "Corporate Financial Planning, Budgeting & Control" course?

You will develop four core skills: financial planning and budget construction, resource allocation and financial decision support, internal control framework design with budget execution control, and variance analysis with governance reporting.



Q4 What tools, methods, or standards are covered in the "Corporate Financial Planning, Budgeting & Control" course?

The course covers the planning cycle and calendar, incremental, zero-based, rolling, and driver-based budgeting, the Balanced Scorecard, OKRs, operating, capital, and cash budget construction, cost behaviour analysis, contribution margin, break-even and cost-volume-profit analysis, overhead allocation, allocation criteria and weighted scoring models, cost-benefit and value-for-money analysis, relevant costing, payback, NPV, IRR and profitability index, internal control frameworks and segregation of duties, authorisation levels and approval limits, commitment accounting, spend gates and variance thresholds, procurement controls and contract oversight, fraud and anti-bribery expectations, control testing, budget versus actual reporting, variance classification, price, volume, mix and efficiency variance analysis, root cause investigation, and re-forecasting routines.

Q5 How is the "Corporate Financial Planning, Budgeting & Control" course applied in real-world practice?

Participants apply it to real work such as preparing an integrated budget for a business unit, allocating a constrained budget across competing requests, designing approval limits and spend gates, investigating a control weakness, and presenting a performance review to the board. The same methods support capital appraisal and rolling re-forecasts.