

INTEGRATING BUDGETING, FORECASTING & BUSINESS PLANNING



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TRAINING CENTER



Introduction

Integrating Budgeting, Forecasting & Business Planning Training Course treats planning as a single connected system rather than three annual exercises. Participants work through business planning, budget construction, forecasting, scenario design, and plan review as one continuous cycle. The programme links strategic intent, financial targets, and operational assumptions so they reinforce each other. As a result, learners gain a method for building plans that hold together. Furthermore, the course strengthens cross-functional coordination, forecast reliability, and the governance that keeps plans aligned and accountable.

Integrating Budgeting, Forecasting & Business Planning Course Objectives

- Explain how business planning, budgeting, and forecasting fit together.
- Translate strategy into business plans with clear objectives and measures.
- Apply incremental, zero-based, rolling, and driver-based budgeting.
- Build integrated operating, capital, and cash budgets.
- Forecast revenue, cost, and cash using quantitative and qualitative methods.
- Align planning assumptions across finance, sales, and operations.
- Apply scenario planning and sensitivity analysis to plan under uncertainty.
- Measure forecast accuracy and reduce bias with MAPE and bias tracking.
- Run rolling forecasts and integrated re-forecast routines.
- Apply planning governance: calendars, ownership, and review cadence.

Course Methodology

- Interactive sessions built on integrated planning and budgeting cases.

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- Workshops on plan construction, driver modelling, and assumption alignment.
- Group exercises on cross-functional planning, scenarios, and review meetings.
- Hands-on practice with driver-based budgets, rolling forecasts, and planning calendars.
- Simulation of a planning committee review and a mid-year re-forecast.
- Facilitator coaching and peer review on personal planning frameworks.

Who Should Take This Course

- Finance managers, controllers, and FP&A professionals.
- Budget officers and planning specialists.
- Strategy and business planning professionals.
- Department heads accountable for plans and targets.
- Sales, operations, and supply chain planning leads.
- Consultants advising on planning process integration.

Integrating Budgeting, Forecasting & Business Planning Course Outlines

Day 1: The Integrated Planning Cycle

- Business planning, budgeting, and forecasting and how they connect.
- The planning calendar, milestones, and approval routes.
- Linking strategy to business plans with the Balanced Scorecard and OKRs.
- Levels of planning: corporate, business unit, and functional.
- Roles and responsibilities across finance and the business.
- Behavioural traps: padding, sandbagging, and gaming.
- Case discussion: a plan, a budget, and a forecast that disagreed.





Day 2: Business Planning and Strategic Translation

- Framing a business plan: scope, horizon, and objectives.
- SWOT, PESTLE, and scenario thinking in plan preparation.
- Translating strategy into initiatives, measures, and targets.
- Revenue and growth planning assumptions.
- Capability, capacity, and resource planning.
- Risk identification and mitigation in the business plan.
- Workshop: building a business plan for a unit or function.

Day 3: 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.
- Exercise: preparing an integrated budget from the business plan.

Day 4: Forecasting, Drivers, and Scenarios

- Driver-based budgeting and forecasting.
- Quantitative methods: trend, moving average, and regression basics.
- Qualitative methods: expert judgement and the Delphi technique.
- Seasonality, cycles, and trend decomposition basics.
- Forecast accuracy metrics such as MAPE and bias tracking.

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- Scenario planning and sensitivity analysis for planning.
- Simulation: revising the plan after a demand or cost shock.

Day 5: Plan Review, Governance, and Reporting

- Budget versus actual reporting and variance classification.
- Price, volume, mix, and efficiency variance analysis.
- Root cause investigation and corrective action routines.
- Rolling forecasts and integrated re-forecast routines.
- Planning governance, calendar discipline, and version control.
- Reporting plans and performance to executives and the board.
- Capstone: presenting an integrated planning, budgeting, and forecasting framework.

Conclusion

By successfully completing Integrating Budgeting, Forecasting & Business Planning, participants will gain an integrated command of the planning cycle, business plan construction, budget development, and forecast accuracy control. They will acquire skills in driver-based planning, cross-functional assumption alignment, scenario analysis, and planning governance that keep plans coherent. Gentex Training Center designs the programme to help professionals plan, budget, and forecast as one system.

FAQs





Q1 What is the "Integrating Budgeting, Forecasting & Business Planning" course about?

It treats planning as a single connected system rather than three annual exercises. The course spans the integrated planning cycle, business planning and strategic translation, budget construction and cost planning, forecasting, drivers and scenarios, and plan review, governance and reporting.

Q2 What are the key benefits of the "Integrating Budgeting, Forecasting & Business Planning" course?

You gain a method for building plans that hold together. The course improves strategy translation into plans, strengthens budget construction and assumptions, sharpens forecasting accuracy and scenario testing, and gives you governance and review routines that keep plans aligned and acted upon.

Q3 What skills will I gain from the "Integrating Budgeting, Forecasting & Business Planning" course?

You will develop four core skills: integrated planning cycle design, business plan construction and strategy translation, budget development with cost and revenue planning, and driver-based forecasting with scenario analysis and planning governance.



Q4 What tools, methods, or standards are covered in the "Integrating Budgeting, Forecasting & Business Planning" course?

The course covers the planning cycle and calendar, the Balanced Scorecard, OKRs, SWOT, PESTLE and scenario thinking, initiative and measure design, operating, capital and cash budget construction, incremental, zero-based, rolling and driver-based budgeting, cost behaviour analysis, contribution margin, break-even and cost-volume-profit analysis, overhead allocation, cost and revenue driver identification, quantitative forecasting methods (trend, moving average, regression basics), qualitative methods (expert judgement and Delphi technique), seasonality and trend decomposition, MAPE and forecast bias measurement, scenario planning and sensitivity analysis, budget versus actual reporting, variance classification, price, volume, mix and efficiency variance analysis, root cause investigation, rolling forecasts and re-forecast routines, and planning governance including calendar discipline and version control.

Q5 How is the "Integrating Budgeting, Forecasting & Business Planning" course applied in real-world practice?

Participants apply it to real work such as building a business plan for a unit, converting that plan into an integrated budget, aligning planning assumptions across sales, operations, and finance, revising the plan after a demand shock, and presenting an integrated plan and performance review to executives. The same methods support rolling re-forecast routines and planning calendar governance.