PLANNING SPECIALIST



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GENTEX Training Center LLC | Orlando - FL, USA
Info@gentextraining.com

Introduction

Planning Specialist examines the practical work of the person who turns plans into documents, calendars, and progress reports that organisations actually use. This Training Course covers data collection, plan drafting, monitoring, and reporting. Participants study PESTLE and SWOT analysis, SMART objectives, work breakdown structures, Gantt charts, KPI tracking, and variance analysis methods. Furthermore, the programme connects analysis to paperwork through planning labs, schedule building, and report drafting workshops. As a result, delegates leave able to prepare, track, and report plans accurately and on schedule.

Planning Specialist Course Objectives

- Define the planning specialist role and its responsibilities.
- Collect and verify planning data and assumptions.
- Apply PESTLE, SWOT, and five forces basics to context analysis.
- Write SMART objectives and measurable targets.
- Build work breakdown structures and Gantt charts.
- Prepare planning documents, calendars, and templates.
- Track progress against milestones and budgets.
- Conduct variance analysis and identify deviations.
- Draft progress reports and dashboards accurately.
- Support review meetings and corrective action follow-up.

Course Methodology

- Interactive workshops using real planning and reporting files.
- Data collection and context analysis labs.
- Work breakdown structure and Gantt chart building exercises.

- Plan document and template drafting workshops.
- Progress tracking and variance analysis practice.
- Action planning that converts each session into a workplace commitment.

Who Should Take This Course

- Planning officers and planning specialists.
- Departmental planning and coordination staff.
- Project coordinators and assistants.
- Performance monitoring and reporting officers.
- Administrative and executive support staff.
- Finance and budget support staff.
- Professionals moving into planning roles.

Planning Specialist Course Outlines

Day 1: The Planning Specialist Role

- Defining the planning specialist role and boundaries.
- The planning cycle and where the role fits.
- Planning terminology and document types.
- Stakeholders and information sources.
- Ethics, accuracy, and confidentiality in planning.
- Tools, templates, and document standards.
- Building the personal planning workplan.

Day 2: Data Collection and Context Analysis

- Data sources, quality, and verification methods.
- PESTLE and SWOT analysis basics.
- Porter's five forces introduction.
- Internal capability and resource review.
- Stakeholder and requirement gathering.
- Documenting assumptions and evidence.
- Preparing the analysis summary.

Day 3: Building Plans and Schedules

- SMART objective and target writing.
- Work breakdown structures and task definition.
- Estimating durations, effort, and dependencies.
- Gantt chart construction and milestone setting.
- Resource and budget planning basics.
- Risk identification and mitigation notes.
- Plan document drafting and formatting.

Day 4: Monitoring, Tracking, and Variance Analysis

- Baselines and progress measurement.
- Milestone tracking and status recording.
- Budget tracking and cost recording.
- Variance analysis and deviation reporting.
- Issue logs and change registers.
- Data integrity and reporting discipline.
- Preparing tracking templates and dashboards.

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Day 5: Reporting and Review Support

- Progress report structure and content.
- Dashboard and scoreboard preparation.
- Presenting data accurately and clearly.
- Supporting review meetings and documentation.
- Following up corrective actions and closures.
- Archiving, version control, and records.
- Personal action plan and continuous improvement.

Conclusion

By successfully completing Planning Specialist, participants will have acquired a practical command of data collection, context analysis, plan and schedule preparation, progress tracking, and reporting. They will know how to build planning documents that teams can use, track progress against baselines honestly, and produce reports that decision-makers trust. In addition, the course prepares delegates to support review meetings and follow corrective actions through to closure. As a result, they return to work ready to carry out planning duties with accuracy and discipline. Gentex Training Center delivers this Training Course with a practical, standards-based approach.

FAQs for the Planning Specialist course

Q1 What is the "Planning Specialist" course about?

It is a five-day programme that explains the practical duties of a planning specialist. It covers data collection and context analysis, SMART objective writing, work breakdown structures and Gantt charts, plan document preparation, progress tracking, variance analysis, and reporting.

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Q2 What are the key benefits of the "Planning Specialist" course?

Participants gain the ability to prepare planning documents accurately, build schedules teams can follow, and track progress against baselines without exaggeration. They also learn to produce reports and dashboards that decision-makers trust and to follow corrective actions through to closure.

Q3 What skills will I gain from the "Planning Specialist" course?

Planning data collection and context analysis with PESTLE and SWOT, plan and schedule preparation with work breakdown structures and Gantt charts, progress monitoring with variance analysis and issue logging, and reporting with dashboard preparation and review meeting support.

Q4 What tools, methods, or standards are covered in the "Planning Specialist" course?

The course covers the planning cycle and specialist role boundaries, planning terminology and document type conventions, stakeholder and information source mapping, data source, quality and verification methods, PESTLE and SWOT analysis, Porter's five forces introduction, internal capability and resource review, requirement gathering methods, assumption and evidence documentation, SMART objective and target writing, work breakdown structure construction and task definition, duration, effort and dependency estimating, Gantt chart construction and milestone setting, resource and budget planning basics, risk identification and mitigation notes, plan document drafting and formatting standards, baseline setting and progress measurement, milestone tracking and status recording, budget and cost tracking, variance analysis and deviation reporting, issue log and change register management, data integrity and reporting discipline, tracking template and dashboard preparation, progress report structure and content design, dashboard and scoreboard preparation, data presentation standards, review meeting support and documentation, corrective action follow-up and closure, and archiving, version control and records practice.

Q5 How is the "Planning Specialist" course applied in real-world practice?

Delegates apply it through context analysis summaries, plan documents, work breakdown structures, Gantt charts, milestone schedules, resource and budget tables, risk notes, tracking templates, issue logs, change registers, variance reports, progress reports, dashboards, review meeting minutes, corrective action logs, and archived plan records. They also use it to support departmental planning submissions and to keep management informed on delivery status.