Advanced Planning, Budgeting & Forecasting Masterclass

19 – 23 April 2027
Los Angeles (USA)

UK Traininig
PARTNER



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Why This Course

In a rapidly changing business landscape, financial leaders must move beyond traditional budgeting toward agile, data-driven, and strategy-aligned planning. To achieve this, organizations need finance professionals who can connect financial models to corporate goals, adapt quickly to uncertainty, and deliver actionable insights that drive performance and growth.

The Strategic Planning, Budgeting & Forecasting Masterclass is an intensive 1-week program designed to equip finance professionals with advanced skills in financial modeling, forecasting, and performance management. Participants will learn to build integrated financial plans, design flexible budgets, and leverage technology to enhance financial decision-making and organizational agility.

What You'll Learn and Practice

By joining this program, you will:

- Master advanced forecasting, scenario planning, and financial modeling techniques.
- Develop strategic, driver-based budgeting processes aligned with business goals.
- Implement rolling forecasts for greater flexibility and accuracy.
- Strengthen financial analysis and performance management capabilities.
- Integrate risk management and technology into planning and forecasting systems.

The Program Flow

Day 1: Strategic Financial Planning

- Aligning financial planning with long-term organizational objectives.
- Designing strategic planning frameworks and governance structures.
- Advanced forecasting techniques for multi-year planning.
- Scenario planning, what-if analysis, and sensitivity modeling.
- Integrating non-financial KPIs and sustainability metrics into financial plans.
- Workshop: Developing a strategy-aligned financial plan.



Day 2: Advanced Budgeting Techniques

- Traditional vs. modern budgeting approaches.
- Zero-based budgeting ZBB and activity-based budgeting ABB.
- Driver-based budgeting for performance-driven organizations.
- Implementing flexible and rolling budgets for dynamic business environments.
- Budgeting best practices for centralized, decentralized, and matrix structures.
- Case study: Redesigning a corporate budgeting framework.

Day 3: Forecasting Methodologies

- Statistical forecasting and time series modeling.
- Applying regression analysis and correlation techniques.
- Monte Carlo simulation for risk-adjusted forecasting.
- Collaborative forecasting and integrating business intelligence BI tools.
- Demand planning and cross-functional forecasting alignment.
- Practical exercise: Building a multi-scenario financial forecast model.

Day 4: Performance Measurement and Variance Analysis

- Designing and tracking Key Performance Indicators KPIs.
- Implementing the Balanced Scorecard for integrated performance management.
- Conducting advanced variance analysis and root cause interpretation.
- Building management dashboards and financial reporting systems.
- Workshop: Designing an executive performance reporting dashboard.

Day 5: Risk Management and Technology in Planning

- Embedding risk assessment into financial planning and forecasting.
- Using data analytics and predictive modeling for planning accuracy.
- Leveraging ERP, EPM, and FP&A technologies for integrated planning.
- Best practices for implementing enterprise planning and analysis systems.
- Capstone Project: Developing a dynamic planning and forecasting model for your organization.

Individual Impact

- Gain mastery of advanced tools for budgeting, forecasting, and financial strategy.
- Strengthen your ability to interpret data and drive strategic financial decisions.
- Enhance your leadership role in organizational planning and performance management.
- Build confidence in using technology and analytics to optimize financial outcomes.



Organizational Impact

- Align financial planning processes with strategic business objectives.
- Improve forecast accuracy and adaptability to market volatility.
- Enhance collaboration between finance, operations, and executive leadership.
- Build a culture of continuous improvement in financial planning and analysis FP&A.

Training Methodology

This program combines strategic insight, hands-on exercises, and analytical application through:

- Real-world business case studies and best-practice models.
- Interactive financial modeling and scenario-building workshops.
- Group exercises on budgeting, forecasting, and KPI development.
- Live demonstrations of planning technologies and data analytics tools.
- Facilitator-led discussions on emerging trends in corporate finance.

Beyond the Course

Upon completion, participants will be equipped to lead strategic financial planning and analysis functions that deliver real business impact. Graduates will return with the tools and frameworks needed to drive accuracy, agility, and alignment across all levels of financial management.

