Integrating Budgeting, Forecasting & Business Planning

25 – 29 October 2027
Edinburgh (UK)

UK Trainig
PARTNER



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Why This Course

In today's dynamic business environment, organizations need financial planning processes that go beyond traditional budgeting. Effective financial management requires integrating budgeting, forecasting, and business planning into a unified framework that supports strategic objectives and improves organizational agility. When these processes work together, leaders gain clearer financial insights, stronger performance management, and better decision-making capabilities.

This comprehensive 1-week program is designed to help finance professionals strengthen their ability to connect financial planning with strategic business goals. Participants will explore advanced techniques in forecasting, budgeting, and financial modeling while learning how to integrate these processes into a cohesive planning framework. Through practical examples and applied exercises, the program provides the tools needed to enhance financial planning accuracy and drive stronger business performance.

What You'll Learn and Practice

By participating in this program, you will:

- Develop an integrated approach to budgeting, forecasting, and business planning.
- Apply advanced forecasting techniques and financial modeling tools.
- Align financial plans with strategic objectives and key performance indicators.
- Improve decision-making through stronger financial analysis and reporting.
- Implement rolling forecasts and scenario planning to increase planning flexibility.
- Strengthen financial planning and analysis FP&A practices within your organization.

The Program Flow

Day 1: Foundations of Integrated Financial Planning

- Understanding the relationship between budgeting, forecasting, and business planning.
- Integrating financial planning with organizational strategy and objectives.
- Identifying the key components of effective financial plans.
- Exploring best practices in financial planning and analysis FP&A.



Day 2: Advanced Budgeting Techniques

- Applying Zero-Based Budgeting ZBB and Activity-Based Budgeting ABB.
- Developing flexible budgets and rolling budgeting approaches.
- Evaluating capital investment decisions through capital budgeting methods.
- Adapting budgeting practices to different organizational structures.

Day 3: Forecasting Methods and Financial Modeling

- Applying statistical techniques for accurate financial forecasting.
- Building structured and reliable financial models.
- Conducting scenario analysis and sensitivity testing.
- Using Monte Carlo simulation to evaluate financial risks and uncertainties.

Day 4: Strategic Business Planning

- Aligning financial plans with corporate strategy and long-term goals.
- Developing key performance indicators KPIs to measure financial outcomes.
- Applying the Balanced Scorecard approach to strategic planning.
- Exploring long-term financial planning and sustainable growth strategies.

Day 5: Integration and Performance Management

- Integrating budgets, forecasts, and strategic business plans.
- Monitoring performance through variance analysis and financial metrics.
- Developing financial dashboards and management reports.
- Implementing continuous improvement practices in financial planning processes.

Individual Impact

- Strengthen financial planning and analytical capabilities.
- Improve expertise in forecasting and financial modeling techniques.
- Enhance the ability to link financial insights with strategic decision-making.
- Develop practical skills in integrated financial planning and analysis.

Work Impact

- Improve the alignment between financial planning and organizational strategy.
- Increase the accuracy and flexibility of financial forecasts and budgets.
- Support better business decisions through integrated financial insights.
- Strengthen performance management and financial accountability.



Training Methodology

This program combines structured financial frameworks with practical learning to ensure participants gain real-world application skills. Training methods include:

- Interactive workshops and facilitated discussions.
- Case studies based on real financial planning scenarios.
- Group exercises focused on budgeting, forecasting, and modeling.
- Financial analysis and scenario planning activities.
- Practical tools and templates for integrated financial planning.

Beyond the Course

By the end of the program, participants will be able to:

- Develop integrated financial planning frameworks that support organizational strategy.
- Build advanced financial models for forecasting and performance analysis.
- Align budgets and forecasts with key business objectives.
- Implement performance management systems that connect strategy with financial results.

