



Future-Oriented Training and Consulting

FINANCIAL PLANNING AND BUDGETING PROGRAM

Financial Planning, Budgeting & Statement Analysis

Equipping professionals to build sound budgets and evaluate financial performance.

Proven Budgeting Frameworks Structured frameworks for planning, budgeting, and analysis.	Executive Discussions Case studies, simulations, and executive discussions from real organizations.
Budgeting Tool Exposure Hands-on exposure to budgeting and financial analysis tools.	Confident Financial Evaluation The skills to build sound budgets and evaluate performance with confidence.

CONTACT & HEADQUARTERS

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Program Overview

This program builds practical expertise in financial planning, budget development, and statement analysis.

Through case studies, executive discussions, simulations, and hands-on exposure to budgeting and financial analysis tools, participants will develop the skills to build sound budgets and evaluate financial performance with confidence.

Program Objectives

- **Understand Financial Planning Fundamentals:** Grasp how planning connects strategy to financial outcomes.
- **Build Effective Budgets:** Develop budgets grounded in realistic assumptions.
- **Apply Budgeting and Analysis Tools:** Use software to build, track, and adjust budgets.
- **Analyze Financial Statements:** Evaluate performance using statements and ratios.
- **Monitor and Adjust Financial Plans:** Respond to variances and changing conditions.
- **Sustain Financial Planning Discipline:** Apply review and forecasting practices long-term.

Target Audience

This program is designed for professionals building budgets and analyzing financial performance, including:

- **Finance & Budget Analysts** building and managing organizational budgets.
- **Department & Functional Managers** planning and managing budgets for their teams.
- **Operations & Program Managers** tracking budget performance against plans.
- **Controllers & Accounting Professionals** preparing and analyzing financial statements.
- **Business Owners & Entrepreneurs** planning and monitoring their own finances.
- **New Managers & Team Leads** building foundational budgeting skills.
- **Consultants & Financial Advisors** guiding clients on planning and budgeting.

Program Impact

Participants will leave this program with practical planning and analysis skills. Graduates will return to their organizations ready to build sound budgets and evaluate financial performance with confidence.

Program Outline

MODULE 1: Foundations of Financial Planning

- How planning connects strategy to financial outcomes
- Overview of planning cycles and timelines
- Overview of budgeting approaches and methods
- The professional's role in the planning process
- Common pitfalls in financial planning

MODULE 2: Building Effective Budgets

- Setting realistic assumptions and drivers
- Building revenue and expense budgets
- Aligning budgets with organizational priorities
- Hands-on exposure to budgeting software
- Avoiding common budgeting errors

MODULE 3: Analyzing Financial Statements

- Evaluating performance using key financial ratios
- Comparing actual results to budget and prior periods
- Hands-on exposure to financial analysis tools
- Communicating analysis findings clearly

MODULE 4: Monitoring and Adjusting Financial Plans

- Identifying and investigating variances
- Adjusting forecasts as conditions change
- Reporting variance analysis to stakeholders
- Using variance tracking and forecasting tools
- Building a responsive, adjustable financial plan

MODULE 5: Forecasting and Ongoing Discipline

- Building rolling forecasts for the year ahead
- Monitoring performance against long-term goals
- Refining planning practices year over year
- Sustaining financial planning discipline beyond the program