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Course Name

Strategic Financial Planning, Budgeting & Forecasting

Sector Name

Finance, Accounting and Banking

Document Type

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Strategic Financial Planning, Budgeting & Forecasting

Course Introduction

In today’s rapidly evolving business environment, organizations face increasing pressure to make strategic financial decisions that ensure sustainability, profitability, and growth. Effective financial planning, budgeting, and forecasting are no longer just technical finance functions, but critical strategic tools that enable organizations to navigate uncertainty and drive performance.

This course is designed to provide participants with a comprehensive understanding of how to develop and align financial strategies with overall business objectives. It focuses on equipping professionals with the ability to plan financially for the long term, manage budgets effectively, and build accurate forecasts that support informed decision-making.

By covering key areas such as financial analysis, forecasting techniques, budgeting methodologies, and performance measurement, the program empowers participants to translate financial data into actionable insights. Participants will also learn how to enhance financial control, optimize resource allocation, and improve organizational agility.

The course emphasizes a practical and hands-on approach, using real-world case studies, interactive exercises, and financial modeling applications to ensure participants can immediately apply what they learn in their workplace

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Target Audience

- ✓ C-Suite Executives (CEOs, CFOs, COOs)
- ✓ Finance Directors & Senior Managers
- ✓ Financial Planning & Analysis (FP&A) Professionals
- ✓ Budgeting & Cost Control Specialists
- ✓ Business Unit Managers & Department Heads
- ✓ Strategy & Corporate Planning Managers
- ✓ Project & Program Managers
- ✓ Entrepreneurs & Business Owners
- ✓ Management Consultants
- ✓ Professionals involved in financial decision-making

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Learning Objectives

- ✓ Understand the principles and frameworks of strategic financial planning and their role in achieving organizational objectives
- ✓ Develop integrated financial plans aligned with business strategy and long-term goals
- ✓ Apply advanced financial analysis techniques to evaluate performance and support decision-making
- ✓ Build accurate financial forecasts using qualitative and quantitative methods
- ✓ Design and implement effective budgeting systems, including zero based and flexible budgeting
- ✓ Analyze costs and apply cost control techniques to improve operational efficiency
- ✓ Conduct variance analysis and monitor financial performance against budgets
- ✓ Utilize financial KPIs, dashboards, and performance measurement tools to enhance reporting
- ✓ Integrate financial and non-financial data using modern approaches such as Balanced Scorecard and rolling forecasts

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Strategic Financial Planning, Budgeting & Forecasting

Course Outline

✓ DAY 01

Module 1: Strategic Financial Planning & Business Alignment

Strategic Financial Planning Fundamentals

- ✓ Introduction to financial strategy and its role in organizational success
- ✓ Linking financial planning with corporate strategy and vision
- ✓ The financial planning cycle and key components
- ✓ Long-term vs. short-term financial planning
- ✓ Role of finance in strategic decision-making
- ✓ Business & Financial Environment Analysis
- ✓ Internal financial analysis (strengths & weaknesses)
- ✓ External environment analysis (PESTEL, market trends)
- ✓ Industry and competitive financial benchmarking
- ✓ Identifying financial risks and opportunities
- ✓ Scenario planning and strategic assumptions

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Course Outline

✓ Day 02

Financial Analysis & Performance Evaluation
Financial Statement Analysis

- ✓ Understanding Income Statement, Balance Sheet & Cash Flow
- ✓ Ratio analysis (Liquidity, Profitability, Efficiency, Leverage)
- ✓ Trend analysis and benchmarking
- ✓ Financial health assessment
- ✓ Advanced Financial Analysis Tools
- ✓ Break-even analysis✓ Cost-Volume-Profit (CVP) analysis
- ✓ Sensitivity and scenario analysis
- ✓ Investment appraisal techniques (NPV, IRR, Payback)

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Course Outline

✓ Day 03

Forecasting & Financial Modeling
Financial Forecasting Techniques

- ✓ Introduction to forecasting and its importance
- ✓ Qualitative vs. quantitative forecasting methods
- ✓ Time series analysis and trend projections
- ✓ Sales and revenue forecasting
- ✓ Cost and expense forecasting
- ✓ Financial Modeling
- ✓ Building financial models (assumptions & drivers)
- ✓ Integrated financial statements modeling
- ✓ Scenario modeling and stress testing
- ✓ Forecast accuracy and adjustments

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Course Outline

✓ Day 04

Budgeting & Cost Management
Budgeting Fundamentals

- ✓ The role of budgeting in financial planning
- ✓ Types of budgets (Operational, Capital, Cash)
- ✓ Top-down vs. bottom-up budgeting
- ✓ Flexible vs. static budgets
- ✓ Zero-based budgeting
- ✓ Cost Management & Control
- ✓ Cost classification (Fixed, Variable, Semi-variable)
- ✓ Direct vs. indirect costs
- ✓ Cost allocation methods
- ✓ Activity-Based Costing (ABC)
- ✓ Cost optimization strategies

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Course Outline

✓ Day 05

Budgetary Control, Performance Management & Decision Making
Budgetary Control & Variance Analysis

- ✓ Budget monitoring and control systems
- ✓ Variance analysis (favorable vs. unfavorable)
- ✓ Corrective actions and performance improvement
- ✓ Responsibility centers and accountability
- ✓ Performance Management & Strategic Decision Making
- ✓ Key Performance Indicators (KPIs) in finance
- ✓ Linking budgeting with performance management
- ✓ Balanced Scorecard approach
- ✓ Financial dashboards and reporting
- ✓ Strategic decision-making using financial insights
- ✓ Beyond Budgeting & Modern Practices
- ✓ Beyond budgeting concepts
- ✓ Rolling forecasts
- ✓ Integration of financial & non-financial metrics
- ✓ Agile financial planning approaches

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Confirmed Sessions

FROM	TO	DURATION	FEES	LOCATION
July 19, 2027	July 23, 2027	5 days	4950.00 $	Italy , Milan
May 10, 2027	May 14, 2027	5 days	4250.00 $	UAE , Dubai

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