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COURSE BROCHURE

Annual Business Plan Pack and Planning Assumptions Training Course

27 September – 1 October 2027
New York

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Registered in the United Kingdom and Saudi Arabia

Annual Business Plan Pack and Planning Assumptions Training Course

Ref: 2836_108822 **Date:** 27 September – 1 October 2027 **Location:** New York **Fees:** 7900 GBP

Annual Business Plan Pack and Planning Assumptions is a 1-week training course for planning and business analysts who support managers, and it builds an annual business plan pack ready for leadership sign-off. Volatile demand, input costs and funding limits mean organisations now need plans whose assumptions are visible and testable. Jupiter Prime Training offers Annual Business Plan Pack and Planning Assumptions for analysts who turn market and operational evidence into yearly commitments.

Why Annual Business Plan Pack and Planning Assumptions Matters Now

Three pressures shape yearly planning today: markets that shift faster than a single budget round, finance committees that ask how each target was derived, and operational leaders who need plans they can run. An organisation whose analysts document drivers, ranges and options produces plans that survive their first quarter. One that relies on last year plus a percentage loses credibility at every variance meeting. The course draws on driver-based forecasting, scenario planning, the strategic planning cycle and cascading objectives into measures and targets.

Who Gains Most from Annual Business Plan Pack and Planning Assumptions

- Analysts who assemble the yearly plan narrative and figures for a business unit
- Planning officers who coordinate submissions from several departments into one plan
- Commercial analysts who convert market sizing and pipeline evidence into volume forecasts
- Operational analysts who translate capacity, staffing and cost drivers into plan figures
- Strategy office staff who link yearly targets to longer-range objectives

A corporate planning unit gains most when several of its analysts attend together.

Annual Business Plan Pack and Planning Assumptions Capabilities

Participants leave able to show managers exactly where each plan figure came from and what changes it.

- Build driver trees that connect volumes, prices and costs — finance partners reviewing plan logic
- Specify planning assumptions with sources, owners and ranges — managers approving targets
- Calculate base, stretch and downside forecasts — the executive committee weighing risk appetite
- Weigh resource options with appraisal tables — department heads choosing initiatives
- Design a plan pack layout that leads with decisions — leadership sign-off meetings
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Communicate plan trade-offs in short briefing notes — managers defending the plan to the board

Key Annual Business Plan Pack and Planning Assumptions Terms

- Planning assumption — a stated belief about a future condition, such as demand or cost, on which plan figures depend.
- Assumption register — a log of every planning assumption with its source, owner, range and review date.
- Driver tree — a diagram breaking a plan outcome into the operational and market factors that produce it.
- Baseline forecast — the expected outcome if current trends and committed actions continue unchanged.
- Plan option — an alternative use of resources described with its cost, benefit, risk and timing.
- Plan pack — the bundled set of narrative, figures, options and measures presented for approval.

Annual Business Plan Pack and Planning Assumptions Day by Day

Day 1: The Yearly Planning Context

- Strategic Planning Cycle Map — Where The Yearly Plan Sits
- Planning Calendar And Submission Roles — Who Supplies Which Inputs
- Market Signal Scan — External Shifts That Move Next Year's Demand
- Operational Constraint Review — Capacity And Staffing Limits On Ambition
- Prior Plan Variance Lessons — Which Past Assumptions Failed And Why

Day 2: Forecasting Volumes, Prices and Costs

- Driver Tree Construction — Linking Outcomes To Controllable Factors
- Trend And Seasonality Analysis — Setting A Credible Baseline Forecast
- Bottom-Up Versus Top-Down Forecasts — Reconciling Unit And Corporate Views
- Unit Cost Modelling — Fixed, Variable And Step Cost Behaviour
- Forecast Accuracy Checks — Bias And Error Measures For Plan Inputs

Day 3: Writing and Testing Assumptions

- Assumption Register Design — Sources, Owners, Ranges And Review Dates
- Sensitivity Tables — Which Assumptions Move The Plan Most
- Scenario Planning — Base, Stretch And Downside Cases
- Assumption Challenge Sessions — Testing Optimism With Operational Managers
- Risk And Contingency Lines — Buffers Linked To Named Assumptions

Day 4: Options, Targets and Measures

- Option Appraisal Tables — Comparing Initiatives On Cost, Benefit And Risk
- Resource Allocation Trade-Offs — Funding Choices Across Competing Departments
- Target Setting From Forecasts — Turning Ranges Into Committed Numbers
- Cascading Objectives Into Measures — Linking Plan Targets To KPIs
- Plan Briefing Notes — Framing Trade-Offs For Management Decisions

Day 5: Practising the Annual Business Plan Pack

- Case Baseline And Driver Tree — Applying Forecasting To A Sample Unit
- Case Assumption Register — Documenting And Stress-Testing Key Beliefs
- Case Option Shortlist — Selecting Initiatives Within The Resource Envelope
- Peer Review Of Plan Logic — Spotting Gaps Before Sign-Off
- Plan Pack Assembly — Narrative, Figures, Options And Measures Finalised

Applying Annual Business Plan Pack and Planning Assumptions After the Course

- Set up an assumption register for the next planning round and agree owners for the ten assumptions that move the plan most.
- Rebuild one unit's forecast as a driver tree and present base, stretch and downside cases to its manager.

Annual Business Plan Pack and Planning Assumptions Questions FAQ

What is Annual Business Plan Pack and Planning Assumptions work and why does it matter now?

Annual Business Plan Pack and Planning Assumptions work is the analyst practice of turning evidence into a yearly plan with visible, testable assumptions. It matters now because volatile markets punish plans whose figures cannot be traced or quickly revised.

Which roles gain most from Annual Business Plan Pack and Planning Assumptions training?

Planning and business analysts who support managers gain most from Annual Business Plan Pack and Planning Assumptions training. That includes commercial, operational and strategy office analysts.

How does Annual Business Plan Pack and Planning Assumptions training differ from a requirements-focused business analysis course?

Annual Business Plan Pack and Planning Assumptions training centres on forecasts, assumptions, options and plan documents. A requirements course covers elicitation and solution specifications instead.

What do you bring back from Annual Business Plan Pack and Planning Assumptions training?

You bring back a practised method for Annual Business Plan Pack and Planning Assumptions work. It includes a driver tree, assumption register, scenarios and option shortlist.

Annual Business Plan Pack and Planning Assumptions: The Way Forward

The annual business plan pack each participant assembles first informs which initiatives managers fund for the coming year. Planning analysts, unit managers and finance partners use it at sign-off. After its first quarter, the assumption register deserves a fresh look, since actual results show which beliefs were too optimistic or too cautious.