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COURSE BROCHURE

Advanced Multi-Year Strategic Planning Training Course

14 – 25 November 2027
Online

Advanced Multi-Year Strategic Planning Training Course

Ref: 462_16793 **Date:** 14 – 25 November 2027 **Location:** Online **Fees:** 3200 GBP

Multi-Year Strategic Planning is an advanced 2-week training course for strategic planning managers, corporate planning officers and heads of strategy offices who must lead the planning cycle and produce a Multi-Year Strategic Plan with cascaded initiatives and budgets. Longer investment horizons and faster environmental shifts make a plan that links foresight to resources a core leadership instrument. Jupiter Prime Training delivers this course for planners who now lead the cycle.

Why Multi-Year Strategic Planning Matters Now

Three forces shape multi-year planning today: boards that expect capital and operating choices to trace back to stated strategic priorities, environments where technology and customer expectations move faster than annual budgets, and sector partners who coordinate investment over horizons of three to five years. An organisation that plans well can redirect resources early and explain every trade-off; one that plans badly produces a document nobody funds. The course draws on the Balanced Scorecard BSC of Kaplan and Norton, the Nine Steps to Success framework of the Balanced Scorecard Institute and ISO 9004:2018 guidance on sustained organisational success.

Who Gains Most from Multi-Year Strategic Planning

- Strategy office leads who design the planning calendar and coordinate every contributing unit
- Corporate planning officers who consolidate business unit submissions into one enterprise plan
- Financial planning partners who translate strategic priorities into multi-year funding envelopes
- Business unit heads who own strategic objectives and the initiatives beneath them
- Transformation and portfolio coordinators who sequence initiatives across the planning horizon

A strategy office attending with its finance and portfolio counterparts gains most, because the group can agree one planning calendar, one set of assumptions and one route from priorities to funded initiatives.

Multi-Year Strategic Planning Capabilities

Participants move from compiling plans to steering a planning cycle that connects foresight, choice and funding across several years.

- Design a planning calendar with gates, owners and inputs for each phase — executive committees approving the cycle
- Assess the external environment through PESTEL, industry forces and trend radars — leaders choosing which shifts to act on
- Build alternative scenarios and test strategic options against them — boards weighing resilience against ambition
- Specify strategic objectives, measures and targets on a strategy map — unit heads accepting accountability
- Align initiatives with multi-year funding envelopes and capacity limits — finance committees allocating resources
- Communicate the plan and its review cadence to every contributing unit — staff translating priorities into work

Key Multi-Year Strategic Planning Terms

- Planning horizon — the period, often three to five years, over which strategic objectives, initiatives and funding are set and tracked.
- Environmental scanning — the structured search for political, economic, social, technological, environmental and legal signals that could affect strategy.
- Scenario — a plausible, internally consistent picture of the future used to test whether strategic options remain sound.
- Strategic option — a distinct direction the organisation could take, appraised for fit, feasibility and acceptability before selection.
- Strategy map — a one-page diagram of strategic objectives linked by cause and effect across Balanced Scorecard perspectives.
- Rolling plan — a multi-year plan refreshed at fixed intervals by adding a new final year as the current year closes.

Multi-Year Strategic Planning Day by Day

Day 1: The Planning Cycle and Its Architecture

- Planning Cycle Phases — Deciding the Sequence From Scanning to Review
- Planning Calendar Design — Setting Gates, Owners and Submission Points
- Strategy Office Mandate — Clarifying Who Facilitates and Who Decides
- ISO 9004 Self-Assessment — Gauging Organisational Readiness for Planning
- Planning Assumptions Register — Fixing Shared Baselines Before Analysis Begins

Day 2: Purpose, Ambition and Strategic Direction

- Mission and Vision Statements — Testing Whether Direction Guides Real Choices
- Core Values Translation — Turning Values Into Planning Criteria
- Stakeholder Expectation Mapping — Weighing Owner, Customer and Partner Demands
- Strategic Ambition Statements — Expressing Long-Range Intent in Measurable Terms
- Strategic Themes — Grouping Priorities Around a Few Clear Directions

Day 3: Scanning the External Environment

- PESTEL Analysis — Separating Material Signals From Background Noise
- Five Forces Industry Analysis — Judging Competitive Pressure on Margins
- Trend Radar Construction — Ranking Emerging Shifts by Impact and Timing
- Weak Signal Monitoring — Spotting Discontinuities Before They Mature
- Customer and Market Segmentation — Locating Where Future Demand Will Sit

Day 4: Assessing Internal Capability

- Value Chain Analysis — Locating Activities That Create Distinctive Advantage
- Resource and Capability Audit — Judging What Can Be Scaled or Copied
- VRIO Assessment — Testing Which Capabilities Sustain Advantage
- Performance Trend Review — Reading Past Results Before Setting Targets
- SWOT to TOWS Matrix — Converting Diagnosis Into Candidate Strategies

Day 5: Scenario Building for Long Horizons

- Critical Uncertainty Selection — Choosing the Two Drivers Scenarios Rest On
- Scenario Matrix Construction — Framing Four Contrasting Futures
- Scenario Narratives — Making Each Future Concrete for Decision Makers
- Signposts and Triggers — Recognising Which Future Is Unfolding
- Strategy Wind-Tunnelling — Testing Today's Plan Against Each Scenario

Day 6: Generating and Appraising Strategic Options

- Ansoff Growth Matrix — Framing Market and Product Expansion Routes
- Option Generation Techniques — Widening Choices Before Narrowing Them
- Suitability, Acceptability and Feasibility Tests — Screening Options Consistently
- Multi-Criteria Option Scoring — Ranking Directions Against Weighted Criteria
- Strategic Choice Records — Documenting Why an Option Was Selected

Day 7: Objectives, Measures and the Strategy Map

- Balanced Scorecard Perspectives — Balancing Financial and Non-Financial Priorities
- Strategy Map Design — Linking Objectives Through Cause and Effect
- Objective Statements — Writing Outcomes Units Can Own
- Leading and Lagging Measures — Choosing Indicators That Signal Progress Early
- Multi-Year Target Trajectories — Phasing Ambition Across the Planning Horizon

Day 8: Initiatives, Funding and Resource Allocation

- Strategic Initiative Charters — Defining Scope, Sponsor and Expected Contribution
- Initiative Prioritisation Matrix — Ranking by Strategic Fit and Effort
- Multi-Year Funding Envelopes — Linking Capital and Operating Budgets to Themes
- Capacity and Dependency Mapping — Sequencing Initiatives Without Overload
- Strategic Reserve Mechanisms — Keeping Funds for Emerging Opportunities

Day 9: Cascading, Communication and Review Cadence

- Plan Cascading Logic — Translating Enterprise Objectives Into Unit Plans
- Nine Steps to Success Framework — Structuring Rollout and Ownership
- Strategy Narrative Writing — Explaining the Plan to Every Audience
- Quarterly Strategy Review Design — Setting Agenda, Evidence and Decisions
- Annual Plan Refresh Rules — Deciding When to Roll or Rewrite

Day 10: Practising the Multi-Year Strategic Plan

- Scenario Stress Test of Chosen Options — Confirming Robustness Before Approval
- Strategy Map and Target Validation — Checking Logic With Peer Planners
- Initiative Portfolio Sequencing — Fitting Charters Within Funding Envelopes
- Board Presentation Rehearsal — Defending Priorities Under Executive Questioning
- Multi-Year Strategic Plan Assembly — Completing Objectives, Initiatives, Budgets and Cadence

Applying Multi-Year Strategic Planning After the Course

- Run a scenario session with the executive team using the matrix and signposts method, then record which strategic options survive every future.
- Redesign the next planning calendar with explicit gates, an assumptions register and a quarterly strategy review agenda.

Multi-Year Strategic Planning Questions FAQ

What is multi-year strategic planning and why does it matter now?

Multi-year strategic planning sets direction, objectives, initiatives and funding over a horizon of several years. It matters now because environments shift faster than annual budgets, and leaders need a plan that links foresight to resource choices and can be refreshed without starting again.

Which roles gain most from multi-year strategic planning training?

Strategy office leads, corporate planning officers, financial planning partners and business unit heads gain most. You benefit most if you coordinate contributions from several units, consolidate plans or must defend the link between priorities and budgets before an executive committee.

How does multi-year strategic planning differ from a strategy implementation course?

Multi-year strategic planning covers the whole cycle from scanning and scenarios to choice, targets and funding. An implementation course starts after the plan is approved and focuses on running initiatives, while this course concentrates on building the plan that those initiatives later deliver.

What do you bring back from multi-year strategic planning training?

You bring back a drafted plan with scenarios, a strategy map, multi-year targets, chartered initiatives within funding envelopes and a review cadence. You also bring a planning calendar and an assumptions register you can apply in your next cycle.

Multi-Year Strategic Planning: The Way Forward

The Multi-Year Strategic Plan built during the course first informs which strategic options the executive committee funds for the coming horizon. Strategy offices, finance partners and unit heads use it to align budgets, initiatives and reviews. After the first quarterly review, revisit the scenario signposts and ask whether the assumptions behind each target still hold, then adjust before the annual refresh.