JUPITER PRIME

Consulting • Training • Advisory

جوبيتر برايم للاستشارات والتدريب

COURSE BROCHURE

AI Rolling Forecasts and Board Pack Narratives Training Course

28 March – 1 April 2027
Online

AI Rolling Forecasts and Board Pack Narratives Training Course

Ref: 805_30599 **Date:** 28 March – 1 April 2027 **Location:** Online **Fees:** 2900 GBP

AI Rolling Forecasts and Board Pack Narratives is a 1-week training course for FP&A analysts, budget controllers and finance business partners who build a Rolling Forecast and Board Narrative Pack from machine learning projections and generated commentary. Boards now expect quarterly reforecasts with clear scenario stories rather than a static annual budget explained months late. Jupiter Prime Training offers AI Rolling Forecasts and Board Pack Narratives for CFO offices.

Why AI Rolling Forecasts and Board Pack Narratives Matter Now

Three forces shape this work today. Volatile input costs and demand make the annual budget stale within weeks, and finance leaders shift to rolling horizons. Generative AI can draft variance commentary, yet directors still hold the CFO office answerable for every sentence they read. An organisation that handles this well reallocates funds early and earns board trust; one that handles it badly ships confident numbers without traceable assumptions. The course rests on ISO/IEC 42001 AI management system and the NIST AI Risk Management Framework AI RMF for model oversight.

Who Gains Most from AI Rolling Forecasts and Board Pack Narratives

- Analysts who maintain driver trees and monthly reforecast models
- Controllers who own cost-centre envelopes and spending releases
- Business partners who translate operating plans into financial drivers
- Reporting leads who assemble board and executive committee packs
- Finance systems specialists who connect planning tools to source ledgers

A CFO office gains most when its planning, reporting and business partnering staff attend together and agree one forecast cadence.

AI Rolling Forecasts and Board Pack Narratives Capabilities

Participants move from producing numbers to defending a forecast story that directors can challenge line by line.

- Design a driver tree linking volume, price and headcount signals to the forecast — CFO
- Calibrate a machine learning projection against a naive roll-forward baseline — FP&A lead
- Build three funded scenarios with explicit trigger points — executive committee
- Test generated variance commentary for factual accuracy and tone — audit committee
- Specify anomaly flags that route unusual movements to an owner — budget holders
- Communicate forecast uncertainty through ranges and confidence bands — board directors

Key AI Rolling Forecasts and Board Pack Narratives Terms

- Rolling forecast — a projection that adds a new period as each one closes, keeping a constant horizon such as eighteen months.
- Driver-based budget — a budget computed from operational drivers such as units, rates and headcount rather than prior-year lines.
- Forecast bias — a persistent tendency for projections to land above or below actuals, signalling a model or behavioural fault.
- Scenario trigger — a measurable threshold that tells management to switch from the base case to an alternative plan.
- Generated commentary — narrative text drafted by a language model from variance data and checked by an analyst before release.
- Board pack — the set of financial statements, forecasts and narrative that directors receive ahead of each meeting.

AI Rolling Forecasts and Board Pack Narratives Day by Day

Day 1: From Annual Budget to Rolling Horizon

- Forecast Horizon Choice — Eighteen-Month Versus Four-Quarter Cadence
- Driver Tree Mapping — Which Operational Signals Move Revenue
- Planning Calendar Redesign — Monthly Refresh Versus Quarterly Reset
- Forecast Accuracy Baseline — Measuring Today's Bias and Error
- ISO/IEC 42001 Scope — Which Finance Models Need Formal Oversight

Day 2: Machine Learning Projection Methods

- Time-Series Models — When Seasonality Justifies Algorithmic Projection
- Gradient-Boosted Regressors — Linking External Indicators to Sales Volume
- Backtesting Windows — Proving a Model Beats the Roll-Forward
- Feature Lineage Records — Tracing Every Input to a Ledger
- NIST AI RMF Measure Function — Rating Projection Reliability

Day 3: Scenarios, Triggers and Anomaly Flags

- Three-Case Scenario Design — Base, Downside and Stretch Funding Envelopes
- Sensitivity Tornado Charts — Ranking Drivers by Profit Impact
- Scenario Trigger Thresholds — When Management Switches Plans
- Anomaly Detection Rules — Routing Unusual Cost Movements to Owners
- Reallocation Playbooks — Releasing or Freezing Discretionary Spend

Day 4: Generated Commentary for Directors

- Prompt Templates for Variance Commentary — Consistent Board Language
- Fact-Check Protocol — Matching Every Sentence to a Figure
- Confidence Bands in Charts — Showing Uncertainty Without Alarm
- Narrative Sequencing — Headline, Drivers, Risks and Asks
- Sign-Off Workflow — Who Approves Generated Text Before Release

Day 5: Practising the Rolling Forecast and Board Narrative Pack

- Driver Tree Rebuild — Applying Day One Mapping to Participant Data
- Model Selection Exercise — Choosing Between Projection Methods
- Scenario Stress Session — Defending Triggers Before a Mock Board
- Commentary Red-Team Review — Catching Errors in Generated Narrative
- Rolling Forecast and Board Narrative Pack — Final Assembly and Peer Critique

Applying AI Rolling Forecasts and Board Pack Narratives After the Course

- Run a three-month backtest comparing a machine learning projection with the current roll-forward for one business unit.
- Pilot generated variance commentary on the next monthly management pack with a documented fact-check log.

AI Rolling Forecasts and Board Pack Narratives Questions FAQ

What are AI rolling forecasts and board pack narratives, and why do they matter now?

They combine machine learning projections on a moving horizon with generated commentary that explains results to directors. They matter now because volatile costs make annual budgets stale and boards want faster, traceable scenario stories.

Which roles gain most from AI rolling forecasts and board pack narratives?

FP&A analysts, budget controllers, finance business partners and reporting leads gain most. Each owns part of the cycle from driver modelling to the final narrative directors read, so shared methods reduce rework.

How does AI rolling forecasts and board pack narratives training differ from a general AI budgeting course?

It focuses on the CFO office's forecast cadence and board storytelling rather than cost optimisation or general reporting automation. You practise scenario triggers, model backtesting and commentary fact-checking that directors will scrutinise.

What do you bring back from AI rolling forecasts and board pack narratives training?

You bring back a working rolling forecast with a driver tree, three funded scenarios and a draft board narrative checked against source figures, ready to adapt for your next reporting cycle.

AI Rolling Forecasts and Board Pack Narratives: The Way Forward

The Rolling Forecast and Board Narrative Pack first informs whether the next quarter's funding envelope should be released, held or redirected. Controllers and business partners use it with budget holders, and the CFO presents it to directors. After its first cycle, revisit forecast bias and the scenario triggers.