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COURSE BROCHURE

Advanced Driver-Based FP&A and Rolling Forecasts Training Course

27 June – 8 July 2027
Dubai

Advanced Driver-Based FP&A and Rolling Forecasts Training Course

Ref: 1692_62006 **Date:** 27 June – 8 July 2027 **Location:** Dubai **Fees:** 8000 GBP

Driver-Based FP&A and Rolling Forecasts is a 2-week advanced training course for FP&A managers, budget controllers and finance business partners, in which each participant builds a driver-based rolling forecast model with its own scenario brief for the executive committee. Static annual targets age within weeks when volumes, prices and headcount move, so finance leaders need forecasts that refresh from operational drivers. Jupiter Prime Training designed the course around that shift from fixed targets to living forecasts.

Why Driver-Based FP&A and Rolling Forecasts Matter Now

Three forces push finance teams away from the once-a-year target. Executive committees want to see the next six quarters, not the remainder of the fiscal year. Operational leaders expect finance to explain outcomes through the levers they actually control, such as order intake, conversion rates, unit cost and staffing ratios. And planning platforms now make frequent reforecasting technically easy, which exposes weak logic quickly. Organisations that link forecasts to drivers spot turning points early and reallocate spending with confidence; those that do not spend each cycle negotiating numbers rather than testing assumptions. The course rests on driver trees, rolling-horizon forecasting, scenario and sensitivity modelling, and zero-based review techniques.

Who Gains Most from Driver-Based FP&A and Rolling Forecasts

- Planning leads who own the forecast calendar, horizon and refresh rhythm for a division
- Budget controllers who translate cost centre requests into driver logic and spending limits
- Finance business partners who explain forecast movements to operational heads
- Model owners who maintain driver workbooks, assumption registers and version control
- Commercial finance leads who connect pricing, volume and margin levers to the outlook

The greatest gain comes when a central FP&A team attends together with the business partners who feed it, so the driver logic is agreed across both sides.

Driver-Based FP&A and Rolling Forecasts Capabilities

Participants leave able to replace line-by-line extrapolation with forecasts that move when operational levers move, and to defend those forecasts in front of senior leaders.

- Design a driver tree that links operational levers to revenue, cost and cash — model owners and planning leads
- Build a rolling forecast with a fixed horizon and a set refresh cadence — the executive committee
- Test scenarios and sensitivities on the few drivers that move results most — capital and hiring decisions
- Apply zero-based review logic to discretionary cost pools — budget controllers and cost owners
- Calculate and explain variances by driver rather than by account line — operational heads
- Communicate the forecast outlook and its risks in a concise scenario brief — board and executive sponsors

Key Driver-Based FP&A and Rolling Forecasts Terms

- Driver tree — a diagram that breaks a financial result into the operational quantities and rates that produce it.
- Rolling forecast — a forecast that always looks the same number of periods ahead and is refreshed on a fixed cadence.
- Forecast horizon — the span of future periods a forecast covers, chosen to match the business's decision lead times.
- Sensitivity analysis — testing how much a result changes when one driver moves while the others stay constant.
- Zero-based review — rebuilding a cost pool from the activities it must fund instead of adjusting last year's figure.
- Forecast bias — a consistent tendency for forecasts to land above or below actual results.

Driver-Based FP&A and Rolling Forecasts Day by Day

Day 1: Forecasting Forces and the Case for Drivers

- Annual Target Limitations — When Fixed Budgets Stop Guiding Decisions
- Executive Information Needs — Choosing What Leaders Must See Ahead
- Driver-Based Planning Principles — Linking Operational Levers to Financial Outcomes
- Forecast Maturity Assessment — Locating the Current Finance Team Practice
- Stakeholder Map for Forecasting — Who Supplies, Uses and Challenges Numbers

Day 2: Building the Driver Tree

- Revenue Driver Decomposition — Volume, Price, Mix and Conversion Levers
- Cost Driver Mapping — Fixed, Variable and Step Cost Behaviour
- Headcount and Productivity Ratios — Staffing Plans Tied to Workload
- Driver Selection Tests — Keeping Only Levers That Explain Movement
- Driver Ownership Matrix — Assigning Accountability for Each Assumption

Day 3: Rolling Forecast Architecture

- Horizon and Granularity Choices — Matching Periods to Decision Lead Times
- Refresh Cadence Design — Monthly or Quarterly Update Rhythm
- Forecast Calendar and Handoffs — Sequencing Inputs Across Business Units
- Annual Target Versus Rolling Outlook — Reconciling Two Different Purposes
- Forecast Version Control — Tracking Changes Between Submissions

Day 4: Modelling Techniques for Driver Logic

- Model Structure Standards — Separating Inputs, Calculations and Outputs
- Assumption Register — Documenting Sources and Owners of Each Driver
- Seasonality and Trend Adjustments — Shaping Periods Realistically
- Cash and Working Capital Drivers — Converting Profit Outlook into Liquidity
- Model Integrity Checks — Catching Broken Links Before Review

Day 5: Scenarios and Sensitivities

- Scenario Framing — Base, Downside and Upside Narratives
- Sensitivity Tables and Tornado Charts — Ranking Drivers by Impact
- Trigger Points and Contingency Actions — Pre-Agreed Responses to Shifts
- Long-Range Plan Linkage — Connecting Forecast Drivers to Strategy Years
- Probability-Weighted Outlook — Presenting Range Rather Than Single Point

Day 6: Cost Management Through Drivers

- Zero-Based Review Method — Rebuilding Discretionary Cost Pools From Activities
- Activity-Based Cost Drivers — Allocating Support Costs by Consumption
- Cost Reduction Levers — Separating Structural From Temporary Savings
- Spending Guardrails — Limits Linked to Driver Thresholds
- Savings Tracking Logic — Proving Benefits in the Forecast Line

Day 7: Variance Insight and Forecast Accuracy

- Driver-Level Variance Analysis — Price, Volume and Efficiency Effects
- Forecast Accuracy Metrics — Error, Bias and Hit Rate Measures
- Root Cause Conversations — Turning Variances Into Driver Updates
- Bias Correction Practices — Reducing Sandbagging and Optimism
- Learning Loop Design — Feeding Actual Results Back Into Assumptions

Day 8: Business Partnering Around the Forecast

- Operational Forecast Inputs — Agreeing Drivers With Sales and Operations
- Challenge Sessions — Questioning Assumptions Without Damaging Trust
- Resource Reallocation Decisions — Moving Funds as the Outlook Shifts
- Incentive and Target Separation — Protecting Forecast Honesty
- Planning Platform Requirements — Specifying Tools for Frequent Refresh

Day 9: Presenting the Outlook to Executives

- Executive Committee Storyline — Leading With Decisions Not Data
- Forecast Bridge Charts — Explaining Movement From Prior Outlook
- Risk and Opportunity Register — Quantifying Items Outside the Base Case
- Dashboard Design for Drivers — Showing Levers Leaders Can Pull
- Handling Tough Questions — Defending Assumptions Under Scrutiny

Day 10: Practising the Driver-Based Rolling Forecast Model

- Driver Tree Refinement — Applying Day Two Decomposition to a Case
- Rolling Horizon Set-Up — Applying Cadence and Calendar Choices
- Scenario Run and Sensitivity Ranking — Applying Day Five Techniques
- Peer Challenge Panel — Testing Assumptions Before Executive Release
- Driver-Based Rolling Forecast Model and Scenario Brief — Completing the Work Product

Applying Driver-Based FP&A and Rolling Forecasts After the Course

- Lead a driver tree session with one business unit to agree its five most influential levers and their owners.
- Run a first rolling forecast refresh on a fixed horizon and present a driver-level variance bridge to the finance director.

Driver-Based FP&A and Rolling Forecasts Questions FAQ

What is driver-based FP&A and rolling forecasting, and why does it matter now?

It is a way of forecasting results from operational levers on a horizon that keeps moving forward. It matters now because leaders need an outlook that reacts to change within weeks rather than waiting for the next annual budget.

Which roles gain most from driver-based FP&A and rolling forecasts training?

FP&A managers, budget controllers, model owners and finance business partners gain most. Anyone who builds forecasts, challenges assumptions or explains outlook movements to operational heads will apply the methods directly.

How does driver-based FP&A and rolling forecasts training differ from a budgeting and reporting course?

It focuses on forward-looking driver logic and frequent reforecasting. A budgeting and reporting course centres on the annual budget cycle, management accounts and statutory presentation, while this course centres on levers, horizons and scenarios.

What do you bring back from driver-based FP&A and rolling forecasts training?

You bring back a working driver-based model with a refresh cadence and a scenario brief. You also gain an assumption register and variance method your team can reuse in the next forecast cycle.

Driver-Based FP&A and Rolling Forecasts: The Way Forward

The driver-based rolling forecast model and scenario brief first informs whether next quarter's spending and hiring should stay on course or shift. Planning leads maintain it, business partners feed it and the executive committee uses it. After its first refresh, revisit which drivers truly explained movement, retire the weak ones and tighten the horizon to match real decision lead times.