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COURSE BROCHURE

Strategic Plan to Budget Alignment Training Course

6 – 10 September 2027
Geneva

Strategic Plan to Budget Alignment Training Course

Ref: 1745_63998 **Date:** 6 – 10 September 2027 **Location:** Geneva **Fees:** 6500 GBP

Strategic Plan to Budget Alignment is a 1-week training course for planning analysts, budget coordinators and finance officers who translate multi-year strategy into annual spending and produce a strategy-to-budget bridge with a scenario forecast. Organisations now revise strategy more often than the budget calendar allows, so funding drifts away from stated priorities unless the two cycles are deliberately connected. Jupiter Prime Training runs this Strategic Plan to Budget Alignment course.

Why Strategic Plan to Budget Alignment Matters Now

Boards expect every funded line to trace back to a strategic objective, while operating units push for flexibility as markets, input costs and interest rates move. Finance teams sit between these pressures, holding a calendar built for one annual submission. When the link is weak, capital flows to legacy activities, priority initiatives stall and forecasts lose credibility with executives. When it is strong, reallocation becomes routine rather than political. The course draws on the Balanced Scorecard BSC for cascading objectives into measures, Objectives and Key Results OKR for quarterly targets, and driver-based forecasting for testing whether planned spending can deliver those targets.

Who Gains Most from Strategic Plan to Budget Alignment

- Planning analysts who convert strategic objectives into measurable targets and resource assumptions
- Budget coordinators who run the planning calendar, templates and submission deadlines
- Finance officers who consolidate departmental bids and reconcile them with corporate envelopes
- Strategy office staff who track initiative portfolios and their funding status
- Business unit finance partners who explain variances against strategic targets

A central finance or strategy office gains most when its planners and coordinators attend together, because they then redesign the planning calendar on shared terms.

Strategic Plan to Budget Alignment Capabilities

Participants trace each strategic objective to a funded activity, a driver and a forecast range.

- Map the planning calendar from strategy refresh to budget approval — timing decisions for executive committees
- Cascade objectives into targets with the Balanced Scorecard and OKR — priorities for budget holders
- Build top-down envelopes and reconcile them with bottom-up bids — funding allocation by finance committees
- Apply trend, driver-based and moving-average forecasting techniques — credible projections for controllers
- Design base, upside and downside scenarios with trigger points — contingency choices for leadership
- Communicate the strategy-to-budget link in a one-page narrative — approval by boards

Key Strategic Plan to Budget Alignment Terms

- Planning calendar — the sequence of dates and approvals that moves an organisation from strategy refresh to an approved budget.
- Budget envelope — a top-down spending limit given to a unit before it prepares its detailed bid.
- Strategic initiative — a time-bound project funded to close the gap between current performance and a strategic target.
- Driver-based forecast — a projection built from operational quantities, such as volumes or headcount, multiplied by rates.
- Scenario planning — preparing several plausible futures with different assumptions to test budget resilience.
- Trigger point — a pre-agreed indicator level that switches spending from one scenario to another.

Strategic Plan to Budget Alignment Day by Day

Day 1: Strategy, Calendar and Stakeholders

- Strategy Hierarchy Mapping — Vision, Objectives, Initiatives and Annual Targets
- Planning Calendar Design — Sequencing Strategy Refresh, Envelopes and Approvals
- Stakeholder Roles Matrix — Who Proposes, Challenges and Approves Funding
- External Pressures Scan — Market, Cost and Rate Shifts Affecting Plans
- Planning Process Diagnostic — Locating Gaps Between Strategy and Spending

Day 2: Cascading Objectives into Targets

- Balanced Scorecard Cascade — Translating Objectives into Unit-Level Measures
- OKR Setting — Quarterly Key Results Linked to Funded Activities
- Initiative Charters — Scope, Benefits and Resource Requests
- Prioritisation Matrices — Ranking Initiatives by Strategic Fit and Cost
- Target-Setting Methods — Stretch, Benchmark and Historical Baselines

Day 3: Building the Aligned Budget

- Top-Down Envelopes — Setting Spending Limits from Strategic Priorities
- Bottom-Up Bid Reconciliation — Resolving Gaps Between Requests and Limits
- Run, Grow and Transform Classification — Separating Baseline from Strategic Spend
- Capital and Operating Budget Linkage — Funding Multi-Year Initiatives Consistently
- Budget Challenge Sessions — Testing Bids Against Strategic Measures

Day 4: Forecasting and Scenarios

- Trend and Moving-Average Forecasts — Short-Range Projections for Stable Lines
- Driver-Based Forecasting — Linking Volumes, Rates and Headcount to Spend
- Scenario Construction — Base, Upside and Downside Assumption Sets
- Sensitivity Tables — Identifying the Drivers That Move Results Most
- Trigger Points and Contingency Plans — Switching Spending Between Scenarios

Day 5: Practising the Strategy-to-Budget Bridge

- Calendar Redesign Exercise — Applying Sequencing to a Sample Organisation
- Cascade and Envelope Case — Applying Scorecard Targets to Unit Budgets
- Scenario Forecast Build — Applying Drivers to a Retail and Utilities Case
- Board Narrative Drafting — One-Page Story Linking Spend to Strategy
- Strategy-to-Budget Bridge — Mapped Process and Scenario Forecast Ready for Review

Applying Strategic Plan to Budget Alignment After the Course

- Redraw the organisation's planning calendar so the strategy refresh feeds envelope setting before departmental bids open.
- Prepare a driver-based forecast with base, upside and downside scenarios for one business unit and agree trigger points with its head.

Strategic Plan to Budget Alignment Questions FAQ

What is Strategic Plan to Budget Alignment and why does it matter now?

It is the practice of connecting strategic objectives to annual funding through the planning calendar, targets and forecasts. It matters now because strategy changes faster than budget cycles, and unlinked budgets keep funding activities that no longer serve priorities.

Which roles gain most from Strategic Plan to Budget Alignment?

Planning analysts, budget coordinators and finance officers gain most. They design the calendar, cascade targets, reconcile bids with envelopes and prepare the forecasts executives use to approve spending.

How does Strategic Plan to Budget Alignment differ from a budget preparation course for budget holders?

It works at the level of the whole planning process. A budget holder course teaches managers to prepare and control their own departmental budget, whereas this course connects strategy, calendar, envelopes and scenario forecasts across the organisation.

What do you bring back from Strategic Plan to Budget Alignment?

You bring back a strategy-to-budget bridge: a mapped planning process, cascaded targets and a driver-based forecast with three scenarios and trigger points, ready for discussion with your finance director.

Strategic Plan to Budget Alignment: The Way Forward

The strategy-to-budget bridge gives finance and strategy offices one shared view of how objectives become funded activities. Its first use is usually envelope setting for the next cycle, where executives decide which initiatives receive growth funding. After that cycle, revisit the trigger points and drivers, since healthcare, retail or utilities settings may respond to very different external signals.