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COURSE BROCHURE

Integrated Business Planning and Forecast Reconciliation Training Course

31 October – 4 November 2027
Online

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Registered in the United Kingdom and Saudi Arabia

Integrated Business Planning and Forecast Reconciliation Training Course

Ref: 1755_64418 **Date:** 31 October – 4 November 2027 **Location:** Online **Fees:** 1900 GBP

Integrated Business Planning and Forecast Reconciliation is a 1-week training course for budget owners, planners and finance business partners who build a Planning Reconciliation Pack that ties the annual budget, the rolling forecast and the business plan to one set of assumptions. Organisations now face faster demand swings and shorter planning windows, so disconnected targets cost time and credibility. Jupiter Prime Training delivers this course on integrated business planning.

Why Integrated Business Planning Matters Now

Three pressures shape integrated business planning today: volatile volumes and input costs that age an annual budget within weeks, operations and sales leaders who expect finance to reflect their latest commitments, and boards that ask why the plan, the budget and the forecast tell different stories. An organisation that reconciles them steers capacity, hiring and cash from one baseline; one that does not spends each month explaining gaps between versions. The course rests on driver-based planning, the rolling forecast horizon and the monthly integrated planning cycle that links demand, supply and finance reviews.

Who Gains Most from Integrated Business Planning

- Cost centre holders who own a spending envelope and must explain variances against plan
- Planning analysts who maintain driver models and consolidate departmental submissions
- Finance business partners who translate operational commitments into financial outlooks
- Commercial and supply planners who set volume, mix and capacity assumptions
- Project controllers who phase investment spend across the planning year

Cross-functional groups from finance, sales and operations gain most when they attend together, because they leave sharing one planning calendar and one assumption register.

Integrated Business Planning Capabilities

Participants move from separate budget, forecast and strategy files to a single reconciled planning baseline that every department can trace.

- Map the hand-offs between the business plan, annual budget and rolling forecast — finance leadership
- Build a shared assumption register with owners and refresh triggers — department heads
- Reconcile volume, price and cost drivers across functional submissions — executive review
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Calculate bridges that explain movement between budget, forecast and plan — board reporting
- Design a monthly planning calendar with clear decision gates — operations and sales leaders
- Communicate trade-offs on resources and targets in plain financial terms — budget committees

Key Integrated Business Planning Terms

- Integrated business planning — a monthly cycle that aligns demand, supply, investment and financial plans into one agreed outlook.
- Rolling forecast — a forecast that always looks a fixed number of periods ahead and is refreshed on a regular cadence.
- Assumption register — a controlled list of planning drivers, their owners, sources and the date each was last confirmed.
- Forecast reconciliation — the work of explaining and closing differences between plan versions, departments or time horizons.
- Planning bridge — a waterfall that shows which drivers moved one figure, such as budget profit, to another.
- Decision gate — a scheduled meeting where a defined group accepts, adjusts or rejects a planning proposal.

Integrated Business Planning Day by Day

Day 1: Planning Horizons and Their Purpose

- Business Plan, Budget and Forecast Roles — Which Horizon Answers Which Question
- Planning Maturity Assessment — Where Version Conflicts Arise Today
- Target Setting Versus Forecasting — Separating Ambition From Expectation
- Planning Stakeholder Map — Who Owns Each Number
- Version Control Conventions — Keeping One Trusted Baseline

Day 2: Drivers and Shared Assumptions

- Driver Tree Construction — Linking Volume, Price and Cost to Outcomes
- Assumption Register Design — Ownership and Refresh Triggers for Drivers
- Demand and Capacity Inputs — Aligning Sales and Operations Volumes
- Headcount and Payroll Drivers — Phasing Workforce Costs Across Periods
- Capital Phasing Inputs — Timing Investment Spend in the Outlook

Day 3: Reconciling Versions and Departments

- Budget-to-Forecast Bridges — Explaining Movement to Executives
- Top-Down and Bottom-Up Gap Closing — Settling Departmental Targets
- Intercompany and Shared Cost Allocation — Avoiding Double Counts
- Forecast Bias Diagnostics — Spotting Sandbagging and Optimism
- Scenario Envelopes — Testing Upside and Downside Ranges

Day 4: The Monthly Planning Cycle

- Integrated Planning Calendar — Sequencing Demand, Supply and Finance Reviews
- Decision Gate Design — Agreeing Resource Shifts at Executive Review
- Planning Dashboards — Presenting Gaps, Risks and Opportunities
- Reforecast Triggers — When to Reopen the Rolling Outlook
- Planning Roles and Responsibilities Matrix — Clarifying Sign-Off

Day 5: Practising the Planning Reconciliation Pack

- Driver Tree and Register Rebuild — Applying Shared Assumptions to a Case
- Version Bridge Rehearsal — Presenting Movement to a Mock Committee
- Calendar and Gate Simulation — Running One Full Planning Month
- Peer Review of Assumptions — Challenging Ownership and Evidence
- Planning Reconciliation Pack Completion — Baseline for the Next Cycle

Applying Integrated Business Planning After the Course

- Launch an assumption register for the top ten drivers and assign an owner and refresh date to each
- Run a budget-to-forecast bridge at the next monthly review and agree one decision gate with operations

Integrated Business Planning Questions FAQ

What is integrated business planning and why does it matter now?

Integrated business planning links the business plan, annual budget and rolling forecast through shared drivers and a monthly cycle. It matters now because volatile demand and costs make separate plans outdated quickly, and leaders need one baseline to steer hiring, capacity and cash.

Which roles gain most from integrated business planning and forecast reconciliation?

Budget owners, planning analysts and finance business partners gain most. Commercial and supply planners also benefit, because they set the volume and capacity assumptions that drive the financial outlook.

How does integrated business planning differ from a course on strategic plan to budget alignment?

Integrated business planning focuses on the recurring monthly reconciliation of plan, budget and forecast. A strategy alignment course centres on translating long-range strategic goals into the annual budget once a year, with less attention to rolling reforecasts and cross-department bridges.

What do you bring back from integrated business planning training?

You bring back a reconciled planning baseline: a driver tree, an assumption register with owners, version bridges and a monthly planning calendar with decision gates, ready for the next cycle.

Integrated Business Planning: The Way Forward

The Planning Reconciliation Pack first informs which version of the numbers the executive team will steer by next month. Budget owners, analysts and operations leaders use it to agree drivers and resource shifts at each decision gate. After its first use, revisit the refresh triggers and bias checks to see whether the cycle is gaining trust.