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COURSE BROCHURE

CAPEX and OPEX Performance Dashboards Training Course

3 – 7 October 2027
Abu Dhabi

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Registered in the United Kingdom and Saudi Arabia

CAPEX and OPEX Performance Dashboards Training Course

Ref: 1997_73546 **Date:** 3 – 7 October 2027 **Location:** Abu Dhabi **Fees:** 5500 GBP

CAPEX and OPEX Performance Dashboards is a 1-week training course for finance, project and operations managers who must show capital and operating spend against budget in a form leaders act on, ending with a Spend Performance Dashboard Pack. Capital portfolios are larger and operating budgets tighter, so leaders need early sight of overruns, slippage and cost drift. Jupiter Prime Training offers this course on CAPEX and OPEX performance dashboards.

Why CAPEX and OPEX Performance Dashboards Matter Now

Three pressures shape spend reporting today: boards that want capital projects tracked by milestone and benefit rather than by invoice, operations leaders asked to cut run costs without harming service, and finance teams moving from monthly spreadsheets to near-live data feeds. An organisation with clear dashboards spots a slipping project or a rising cost line while there is still time to act; one without them learns of overruns at year end. The course rests on earned value thinking, driver-based budgeting and established principles of visual design for decision makers.

Who Gains Most from CAPEX and OPEX Performance Dashboards

- Managers who prepare capital budgets and track project spend against approvals
- Managers who own operating cost centres and explain monthly variances
- Project controllers who report cost, schedule and forecast at completion
- Operations managers who link maintenance, energy and staffing costs to output
- Reporting leads who build the management pack for executive meetings

Groups gain most when a finance business partner, a project controller and an operations manager from the same business unit attend together and build one shared dashboard.

CAPEX and OPEX Performance Dashboards Capabilities

Participants leave able to turn ledger and project data into a small set of visuals that prompt a decision rather than a debate about numbers.

- Select KPIs that separate capital efficiency from operating efficiency — investment committees
- Calculate price, volume and timing variances for spend lines — cost centre owners
- Apply earned value measures to capital project tracking — project sponsors
- Design dashboard layouts that place exceptions before detail — executive readers
- Test data lineage from ledger to visual before publication — internal audit
- Communicate a spend story with a clear recommendation — the leadership team

Key CAPEX and OPEX Performance Dashboards Terms

- CAPEX — Capital expenditure: spending on assets that deliver benefit over several years, such as plant, buildings or systems.
- OPEX — Operating expenditure: recurring spending needed to run the organisation, such as staff, energy, maintenance and rent.
- Budget variance — The difference between planned and actual spend, split into causes such as price, volume and timing.
- Earned value — A measure comparing work completed, planned work and actual cost to show project cost and schedule health.
- Forecast at completion — The expected total cost of a project or budget line once all remaining work is done.
- Exception reporting — A reporting style that highlights only items outside agreed tolerance so leaders focus attention quickly.

CAPEX and OPEX Performance Dashboards Day by Day

Day 1: Spend in Strategic Context

- Capital Versus Operating Spend Classification — Where Costs Belong And Why
- Capital Allocation Cycle — Approval, Release And Post-Investment Review
- Operating Cost Drivers — Linking Run Costs To Activity Levels
- Leadership Information Needs — Questions A Dashboard Must Answer
- Current Reporting Audit — Gaps In The Existing Management Pack

Day 2: Selecting Spend KPIs

- KPI Selection Criteria — Relevance, Controllability And Data Availability
- Capital Efficiency Indicators — Spend Rate, Slippage And Benefit Realisation
- Operating Efficiency Indicators — Unit Cost, Cost Per Output And Trend
- Leading And Lagging Measures — Balancing Early Warning With Outcome
- Tolerance Thresholds — Setting Red, Amber And Green Boundaries

Day 3: Variance and Forecast Analysis

- Price, Volume And Timing Variance — Isolating The Cause Of Overspend
- Earned Value Measures — Cost And Schedule Performance Indices
- Rolling Forecasts — Updating Forecast At Completion Each Period
- Phasing Profiles — Separating Timing Shifts From True Savings
- Root Cause Commentary — Writing Variance Notes Leaders Trust

Day 4: Visualising Spend for Leaders

- Visual Encoding Choices — Bars, Bullets, Waterfalls And Sparklines
- Dashboard Layout Hierarchy — Summary, Exception And Drill-Down Layers
- Data Lineage And Reconciliation — Ledger To Visual Integrity Checks
- Refresh Cadence And Ownership — Who Updates Which Figure When
- Executive Briefing Structure — From Insight To Recommended Action

Day 5: Practising the Spend Performance Dashboard Pack

- KPI Set Build Using Day 2 Criteria — Choosing Eight Core Measures
- Variance Bridge For A Sample Project — Applying Day 3 Methods
- Layout Prototype Using Day 4 Principles — Exception Page First
- Peer Challenge Session — Testing Clarity With A Mock Leadership Panel
- Spend Performance Dashboard Pack — Final Pack With Commentary Template

Applying CAPEX and OPEX Performance Dashboards After the Course

- Rebuild one page of the current management pack as an exception view with agreed tolerance thresholds.
- Run a price, volume and timing variance bridge on the largest overspend line and present it to its budget owner.

CAPEX and OPEX Performance Dashboards Questions FAQ

What are CAPEX and OPEX performance dashboards, and why do they matter now?

They are visual reports that track capital and operating spend against budget, forecast and benefit. They matter now because tighter budgets and larger capital portfolios require leaders to see overruns early enough to act.

Which roles gain most from CAPEX and OPEX performance dashboards?

Finance business partners, project controllers, cost centre owners and operations managers gain most, because each prepares or acts on spend figures that leaders use to release funds or cut costs.

How do CAPEX and OPEX performance dashboards differ from a general budgeting course?

The focus is reporting and visual decision support rather than building the budget itself. A budgeting course sets the numbers; this course shows how to track, explain and present them so leaders act.

What do you bring back from CAPEX and OPEX performance dashboards training?

You bring back a tested KPI set, a variance bridge method and a dashboard layout. Each adapts to your own projects.

CAPEX and OPEX Performance Dashboards: The Way Forward

The Spend Performance Dashboard Pack informs the first decision at the next spend review: which projects or cost lines need intervention now. Finance partners, project controllers and operations managers use it to align on one version of the figures. After its first reporting cycle, revisit the tolerance thresholds, since early bands are often set too wide or too narrow.