JUPITER PRIME

Consulting • Training • Advisory

جوبيتر برايم للاستشارات والتدريب

COURSE BROCHURE

Driver-Based Business Plan Forecasting Training Course

11 – 15 January 2027
Casablanca

jupiterprime.uk

info@jupiterprime.uk

Registered in the United Kingdom and Saudi Arabia

Driver-Based Business Plan Forecasting Training Course

Ref: 2335_87285 **Date:** 11 – 15 January 2027 **Location:** Casablanca **Fees:** 4500 GBP

Driver-Based Business Plan Forecasting is a 1-week training course for business planners and financial analysts who translate strategy and economic assumptions into numbers; it produces an assumptions-led business plan forecast. As interest rates, input costs and demand shift faster than annual budgets can follow, boards want forecasts whose every figure traces back to a stated driver. Jupiter Prime Training offers this course on driver-based business plan forecasting.

Why Driver-Based Business Plan Forecasting Matters Now

Three forces shape driver-based business plan forecasting today: volatile macroeconomic inputs; leadership teams that expect the plan to be refreshed quarterly rather than yearly; and lenders and investors who test every assumption behind projected cash and profit. An organisation whose forecast is built on volumes, prices, rates and productivity can show quickly how a change in one input moves the result; one built on last year plus a percentage cannot. The course rests on driver trees, rolling forecasts and forecast-accuracy measurement.

Who Gains Most from Driver-Based Business Plan Forecasting

- Business planners who turn strategic goals into multi-year volume, price and headcount assumptions
- Financial analysts who build and maintain the forecast linking operating drivers to profit and cash
- Commercial finance partners who agree sales and margin drivers with business unit heads
- Strategy analysts who convert market and economic outlooks into planning inputs
- Planning leads who run quarterly reforecasts and report accuracy to leadership

A planning and analysis function gains most when its planners and commercial partners attend together, because shared driver definitions stop each unit forecasting on its own logic.

Driver-Based Business Plan Forecasting Capabilities

Participants learn to replace inherited percentages with explicit, testable drivers that leadership can challenge and update.

- Design a driver tree linking revenue, cost and cash to operational measures — the structure of the plan
- Specify macroeconomic assumptions with sources, ranges and owners — the assumptions book signed off by leadership
- Build a rolling forecast that extends a fixed horizon each quarter — reforecast decisions
- Calculate forecast accuracy and bias with mean absolute percentage error — trust in the next plan
- Test sensitivity of profit and cash to the most volatile drivers — funding and pricing decisions
- Align the operating budget with the multi-year business plan — targets agreed with business unit heads

Key Driver-Based Business Plan Forecasting Terms

- Business driver — a measurable quantity, such as volume or price, that directly moves a financial result.
- Driver tree — a diagram breaking a financial outcome into the drivers that produce it, level by level.
- Rolling forecast — a forecast that adds a new period as each one ends, keeping a constant horizon ahead.
- Assumptions book — the recorded list of planning assumptions with their source, owner, value and date of last review.
- Forecast bias — a persistent tendency for forecasts to be above or below actual results.
- Mean absolute percentage error — the average size of forecast errors expressed as a percentage of actual values.

Driver-Based Business Plan Forecasting Day by Day

Day 1: From Strategy to Plan Drivers

- Strategic Goals Translation — Turning Ambitions into Volume and Margin Targets
- Driver Tree Construction — Breaking Profit into Operational Measures
- Driver Selection Tests — Keeping Material, Measurable and Controllable Drivers
- Plan Horizon Choices — Annual Budget, Rolling Forecast and Multi-Year View
- Planning Calendar Design — Linking Strategy Reviews to Forecast Cycles

Day 2: Economic and Market Assumptions

- Macroeconomic Input Selection — Inflation, Exchange Rates and Borrowing Costs
- Market Size and Share Assumptions — Sizing Demand for Each Product Line
- Price and Cost Escalation Indices — Setting Contract and Input Rates
- Assumptions Book Structure — Recording Source, Owner and Review Date
- Consensus Outlook Comparison — Challenging Internal Views Against External Ranges

Day 3: Building the Driver-Based Model

- Revenue Build by Volume and Price — Modelling Sales from Unit Drivers
- Workforce Cost Drivers — Headcount, Pay Rates and Productivity Ratios
- Working Capital Drivers — Debtor Days, Stock Turns and Creditor Terms
- Capital Spending Links — Connecting Growth Assumptions to Investment Needs
- Model Integrity Checks — Balancing Profit, Cash and Balance Sheet

Day 4: Rolling Forecasts and Accuracy

- Quarterly Reforecast Routine — Updating Drivers Rather Than Line Items
- Forecast Accuracy Metrics — Mean Absolute Percentage Error and Bias Tracking
- Sensitivity Tables — Ranking Drivers by Effect on Profit and Cash
- Forecast Commentary — Explaining Changes Through Driver Movements
- Budget and Plan Reconciliation — Aligning Annual Targets with Multi-Year Plan

Day 5: Practising the Assumptions-Led Business Plan Forecast

- Manufacturing Case Driver Tree — Applying Day 1 Methods to a Packaging Producer
- Retail Case Assumptions Book — Applying Day 2 Inputs to a Store Network
- Accuracy Review of Past Forecasts — Applying Day 4 Metrics to Case History
- Leadership Challenge Session — Defending Assumptions to a Mock Planning Committee
- Assumptions-Led Business Plan Forecast — Assembling Drivers, Assumptions, Model and Commentary

Applying Driver-Based Business Plan Forecasting After the Course

- Map the current forecast into a driver tree and mark which lines still rest on percentage uplifts rather than operational drivers.
- Start an assumptions book for the next reforecast and measure accuracy and bias of the last four forecasts.

Driver-Based Business Plan Forecasting Questions FAQ

What is driver-based business plan forecasting, and why does it matter now?

It builds forecasts from operational and economic drivers such as volume, price and headcount rather than from prior-year figures. Volatile costs and rates make traceable assumptions essential for quick reforecasting.

Which roles gain most from driver-based business plan forecasting?

Business planners and financial analysts gain most, with commercial finance partners and strategy analysts.

How does driver-based business plan forecasting differ from a foundation budgeting course?

It works at practitioner depth on multi-year plans, economic assumptions and forecast accuracy, rather than the budget calendar and basic phasing taught to first-time budget holders.

What do you bring back from driver-based business plan forecasting training?

You bring back an assumptions-led business plan forecast for a case organisation, with a driver tree, assumptions book and linked model.

Driver-Based Business Plan Forecasting: The Way Forward

The assumptions-led business plan forecast first informs the leadership decision on which growth and cost targets to adopt for the coming plan period. Planners and analysts maintain it each quarter, and business unit heads own their drivers. After its first reforecast, the accuracy results deserve revisiting, because they show which assumptions need better sources or owners.