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COURSE BROCHURE

Rolling Capital Plan and Post-Investment Audit Training Course

17 – 21 January 2027
Online

Rolling Capital Plan and Post-Investment Audit Training Course

Ref: 2350_87994 **Date:** 17 – 21 January 2027 **Location:** Online **Fees:** 1900 GBP

Rolling Capital Plan and Post-Investment Audit is a 1-week training course for FP&A and capital planning managers who build and refresh a rolling capital plan. Organisations now re-forecast capital spending several times a year, and boards expect evidence that approved projects delivered what their business cases promised. Rolling Capital Plan and Post-Investment Audit is taught by Jupiter Prime Training.

Why Rolling Capital Plan and Post-Investment Audit Matters Now

Three pressures meet in the capital cycle today. Funding costs move faster than annual budgets, so a fixed five-year capex schedule ages within months. Boards and investors ask whether past approvals earned their hurdle, not only whether new requests look attractive. Operating units compete for a limited envelope and challenge any ranking they cannot trace. Organisations that refresh on a set cadence and feed audit lessons into approval criteria release cash from weak projects early; others repeat the same forecasting optimism. The course rests on discounted cash flow appraisal, stage-gate approval and post-completion review practice.

Who Gains Most from Rolling Capital Plan and Post-Investment Audit

- Planners who consolidate capex requests into a multi-year envelope and run quarterly re-forecasts
- Analysts who prepare papers and scoring packs for capital allocation committees
- Finance partners who track project spend, milestones and benefit realisation for operating units
- Internal reviewers who carry out lookbacks on completed investments
- Treasury and funding staff who align the capital calendar with financing capacity

A finance function gains most when its planning lead, committee secretary and lookback reviewer attend together, since they share one cycle.

Rolling Capital Plan and Post-Investment Audit Capabilities

Participants leave able to run the capital cycle as a loop rather than an annual event, with approvals, spending and lookbacks feeding each other.

- Design a quarterly refresh cadence for the multi-year capex envelope — the finance director setting re-forecast timing
- Build a scoring matrix that ranks competing requests on value, risk and strategic fit — the capital allocation committee
- Specify gate criteria and release tranches for large projects — sponsors seeking staged funding
- Calculate variance between approved and actual cash flows on completed assets — the lookback reviewer
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Communicate reallocation proposals when projects slip or underperform — operating unit heads losing or gaining funds
- Apply audit lessons to hurdle rates and forecasting assumptions — the next approval round

Key Rolling Capital Plan and Post-Investment Audit Terms

- Rolling capital plan — a multi-year capex schedule refreshed on a fixed cadence, adding a new period as each one closes.
- Capex envelope — the total capital spending ceiling set for a period.
- Stage gate — a decision point where a project must meet defined criteria before its next funding tranche is released.
- Post-investment audit — a structured review comparing a completed project's actual costs, timing and benefits with its approved business case.
- Capital rationing — allocating limited funds across more positive-value requests than the envelope can support.
- Optimism bias — the tendency of sponsors to overstate benefits and understate costs and durations in investment proposals.

Rolling Capital Plan and Post-Investment Audit Day by Day

Day 1: The Capital Cycle as a Loop

- Strategy-to-Capex Bridge — Which Strategic Themes Earn Envelope Share
- Annual Versus Rolling Capex Calendars — Choosing Refresh Frequency
- Capital Envelope Sizing From Funding Capacity — Setting The Spending Ceiling
- Project Pipeline Register — Tracking Requests From Idea To Close
- Roles Of Sponsors, Planners And Reviewers — Assigning Cycle Ownership

Day 2: Prioritising the Portfolio

- Net Present Value And Profitability Index Ranking — Rationing Scarce Funds
- Multi-Criteria Scoring Matrix — Weighing Risk, Fit And Mandatory Spend
- Maintenance Versus Growth Buckets — Protecting Sustaining Capex
- Interdependent Project Bundles — Funding Linked Requests Together
- Scenario Envelopes Under Funding Stress — Deciding What Gets Deferred

Day 3: Committees, Gates and Funding Releases

- Capital Allocation Committee Charter — Defining Authority Limits And Quorum
- Committee Paper Template — Presenting Requests Consistently For Decision
- Stage-Gate Criteria And Tranche Release — Controlling Spend On Large Projects
- Change Requests And Overrun Approvals — Handling Scope And Cost Growth
- Quarterly Re-Forecast And Reallocation — Moving Funds Between Projects

Day 4: Post-Investment Audit Methods

- Lookback Selection Rules — Choosing Which Completed Projects To Audit
- Approved Versus Actual Cash Flow Variance — Measuring Delivery Gaps
- Benefit Realisation Tracking — Confirming Promised Gains Arrived
- Root Cause Coding Of Variances — Separating Forecast Error From Execution
- Optimism Bias Adjustments — Correcting Future Sponsor Estimates

Day 5: Practising the Rolling Capital Plan

- Utility And Retail Lookback Cases — Applying Variance And Root Cause Coding
- Live Committee Simulation — Ranking And Gating A Mixed Request Set
- Feeding Audit Findings Into Hurdle Rates — Tightening Approval Criteria
- Cycle Calendar And Reporting Pack — Agreeing Hand-Offs Across Roles
- Rolling Capital Plan Build — Completing A Multi-Year Refreshable Schedule

Applying Rolling Capital Plan and Post-Investment Audit After the Course

- Run a lookback on two recently completed projects, coding each variance by root cause and reporting the pattern to the committee
- Propose a quarterly refresh calendar for the capex envelope, with gate dates and reallocation rules agreed with sponsors

Rolling Capital Plan and Post-Investment Audit Questions FAQ

What is a rolling capital plan and post-investment audit, and why does it matter now?

It is the practice of refreshing multi-year capex on a set cadence and checking completed projects against their business cases. It matters now because funding costs shift quickly and boards want proof that past approvals delivered.

Which roles gain most from rolling capital plan and post-investment audit skills?

Capital planners, committee analysts, finance partners and lookback reviewers gain most.

How does rolling capital plan and post-investment audit training differ from an investment appraisal course?

It focuses on running the capital cycle rather than valuing single projects. Here you rank portfolios, run committees, release tranches and audit outcomes.

What do you bring back from rolling capital plan and post-investment audit training?

You bring back a refreshable multi-year capital schedule, a scoring matrix, gate criteria and a lookback method.

Rolling Capital Plan and Post-Investment Audit: The Way Forward

The rolling capital plan built during the course informs the first decision of the next cycle: which deferred requests re-enter the envelope at the coming quarterly refresh. Planners and committee members use it together. After its first lookback round, revisit the scoring weights and hurdle adjustments, where sponsor forecasts proved most optimistic.