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COURSE BROCHURE

Annual Budget and Rolling Forecast Integration Training Course

11 – 15 January 2027
New York

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Registered in the United Kingdom and Saudi Arabia

Annual Budget and Rolling Forecast Integration Training Course

Ref: 2368_88873 **Date:** 11 – 15 January 2027 **Location:** New York **Fees:** 7900 GBP

Annual Budget and Rolling Forecast Integration is a 1-week training course for finance business partners and planning analysts, built around one work product: an integrated planning calendar that lets the annual budget and the rolling forecast share one cycle. Organisations now face shorter planning horizons and can no longer afford two disconnected planning rounds. Jupiter Prime Training runs this course for analysts who own both the target and the outlook.

Why Annual Budget and Rolling Forecast Integration Matters Now

Three forces push the annual budget and the rolling forecast together. Input costs and demand move faster than a twelve-month cycle can follow, so a fixed budget soon describes a business that no longer exists. Boards and lenders want a current view of the year-end outturn, not only the original target. An organisation that joins the two keeps stretch targets meaningful while acting early on change; one that runs them apart burns analyst time and confuses accountability.

Who Gains Most from Annual Budget and Rolling Forecast Integration

- Staff who prepare the annual budget submission and its phasing by month
- Analysts who run quarterly or monthly reforecasts for the leadership team
- Business partners who explain outlook changes to operating managers
- Staff who own the planning timetable and its submission deadlines
- Analysts who maintain the planning model linking targets, actuals and outlook

A planning and analysis team that sends members together gains most, leaving with one agreed calendar.

Annual Budget and Rolling Forecast Integration Capabilities

Participants learn to keep a fixed target and a moving outlook side by side without letting one corrupt the other.

- Distinguish target setting from forecasting — clarifying accountability for budget holders
- Design reforecast triggers and tolerance bands — deciding when an off-cycle update is due
- Align the budget build with the first rolling forecast window — reducing duplicate submissions
- Bridge forecast to budget by driver — explaining the outlook gap to the leadership team
- Specify a rolling horizon and granularity — balancing forecast effort against decision value
- Build an integrated planning calendar — coordinating finance, operations and the board timetable

Key Annual Budget and Rolling Forecast Integration Terms

- Rolling forecast — a forecast that adds a new period as each period closes, keeping a constant horizon ahead.
- Reforecast trigger — a pre-agreed event or variance size that prompts an update outside the routine cycle.
- Stretch target — an ambitious goal set for motivation and accountability, kept apart from the expected outcome.
- Forecast-to-budget bridge — a walk that explains the gap between target and current outlook by its drivers.
- Outturn — the expected full-year result combining actuals to date with the forecast for remaining months.
- Planning calendar — the timetable of submissions, reviews and approvals for the budget and each forecast round.

Annual Budget and Rolling Forecast Integration Day by Day

Day 1: Two Planning Purposes, One Cycle

- Target Versus Outlook Purposes — Separating Accountability from Expectation
- Traditional Annual Cycle Weaknesses — Diagnosing Duplicated Effort and Stale Figures
- Rolling Horizon Choices — Selecting Quarters Ahead for Decision Needs
- Planning Maturity Assessment — Locating Current Practice and Gaps
- Stakeholder Expectation Mapping — Matching Board, Lender and Manager Needs

Day 2: Setting Targets Within a Moving Outlook

- Top-Down Ambition and Bottom-Up Build — Negotiating the Final Target
- Driver Selection for Volume, Price and Headcount — Linking Targets to Operations
- Monthly Phasing and Seasonality Profiles — Spreading the Target Realistically
- Relative Targets and Peer Benchmarks — Reducing Gaming of Fixed Figures
- First Forecast Window Alignment — Using Budget Inputs Twice

Day 3: Reforecast Mechanics

- Reforecast Triggers and Tolerance Bands — Deciding When to Update Off-Cycle
- Forecast Granularity by Line Item — Limiting Detail to Material Drivers
- Outturn Estimates and Remaining Months — Projecting the Full-Year Result
- Forecast Bias and Accuracy Tracking — Testing Whether Outlooks Can Be Trusted
- Event Overlays for One-Off Items — Keeping Run-Rate Trends Clean

Day 4: Bridging Forecast and Budget for Decisions

- Forecast-to-Budget Bridges by Driver — Explaining the Gap to Leadership
- Resource Reallocation Rules — Moving Funds When the Outlook Shifts
- Budget Holder Commentary Standards — Separating Timing from Permanent Changes
- Board Pack Layout for Target and Outlook — Showing Both Views Clearly
- Performance Conversations with Operating Managers — Rewarding Honest Forecasting

Day 5: Practising the Integrated Planning Calendar

- Calendar Milestones and Submission Windows — Applying Day 2 Target Steps to Dates
- Trigger Rules Built Into the Timetable — Applying Day 3 Reforecast Mechanics
- Bridge and Board Reporting Slots — Applying Day 4 Decision Formats
- Peer Review of Draft Calendars — Testing Workload Peaks and Hand-Offs
- Finished Integrated Planning Calendar — Presenting Roles, Dates and Approval Gates

Applying Annual Budget and Rolling Forecast Integration After the Course

- Map the current budget and forecast timetables on one page, then remove one duplicated submission before the next round.
- Agree reforecast triggers and tolerance bands with two budget holders and test them against the last quarter's variances.

Annual Budget and Rolling Forecast Integration Questions FAQ

What is annual budget and rolling forecast integration, and why does it matter now?

It is the practice of running the yearly target and the rolling outlook in one joined cycle. It matters now because conditions shift faster than a fixed budget can follow, and leaders need both a target and a current outturn.

Which roles gain most from annual budget and rolling forecast integration?

Planning analysts and finance business partners who prepare budget submissions and also run reforecasts gain most.

How does an annual budget and rolling forecast integration course differ from a forecasting techniques course?

It focuses on joining two planning processes rather than on statistical methods. A forecasting techniques course builds projections; this course sets targets, triggers and calendars so the budget and forecast work together.

What do you bring back from annual budget and rolling forecast integration training?

You bring back an integrated planning calendar with submission windows, reforecast triggers, bridge reporting slots and approval gates, ready to test in your next planning round.

Annual Budget and Rolling Forecast Integration: The Way Forward

The integrated planning calendar first informs when the next budget round opens and which forecast window it replaces. The head of planning and budget holders use it to schedule submissions and reviews. After its first full cycle, revisit the trigger thresholds and the horizon length against how often off-cycle updates were really needed.