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COURSE BROCHURE

# Technical Manager Budgets and Executive Briefing Training Course

22 – 26 February 2027
Casablanca

# Technical Manager Budgets and Executive Briefing Training Course

**Ref:** 2409_90634 **Date:** 22 – 26 February 2027 **Location:** Casablanca **Fees:** 4500 GBP

Technical Manager Budgets and Executive Briefing is a 1-week training course for engineers, scientists and technical specialists stepping into their first management role, built around a Technical Budget and Executive Briefing Pack. Organisations now expect technical managers to defend spending, frame investments as business cases and brief senior leaders in plain language, not in specifications. Jupiter Prime Training offers this course on Technical Manager Budgets and Executive Briefing.

## Why Technical Manager Budgets and Executive Briefing Matters Now

Three pressures meet the newly appointed technical manager. Finance teams tighten capital and operating spending and ask for evidence before releasing funds. Executive committees decide on laboratory equipment, software licences and plant upgrades without the background to read technical detail. Specialists still expect their manager to protect their resources. A manager who prices options clearly, links them to organisational priorities and briefs decision makers in their own terms secures funding and trust; one who argues from engineering merit alone sees sound proposals deferred, cut or approved without the safeguards that keep them on track.

## Who Gains Most from Technical Manager Budgets and Executive Briefing

- Engineers who now hold a cost centre and answer for its monthly variance
- Scientists who propose instruments, trials or research spending to senior committees
- Specialists leading maintenance, reliability or asset teams who must justify replacement spending
- IT and software leads who request licences, cloud capacity or headcount from finance
- Project engineers who present status, cost overruns and change requests to sponsors

Engineering and research functions that send several new managers together gain a shared budget vocabulary.

## Technical Manager Budgets and Executive Briefing Capabilities

Participants translate technical judgement into the cost and risk language budget holders use.

- Build an annual departmental budget with clear cost drivers — finance business partner
- Calculate payback, net present value and total cost of ownership — capital approval committee
- Explain budget variances with causes and corrective actions — line director
- Design a one-page business case for a technical investment — executive sponsor
- Communicate technical risk as business exposure and options — senior leadership briefing
- Weigh competing funding requests against organisational priorities — departmental spending decision

## Key Technical Manager Budgets and Executive Briefing Terms

- Cost centre — A unit whose spending is tracked separately and owned by one manager.
- Capital expenditure — Spending on equipment or facilities that deliver value over several years.
- Operating expenditure — Recurring spending such as salaries, consumables and subscriptions.
- Budget variance — The difference between planned and actual spending, explained by its causes and the action it calls for.
- Business case — A structured argument setting out the costs, benefits, risks and options of an investment.
- Executive summary — A short opening stating the decision needed and the recommendation before any technical detail.

## Technical Manager Budgets and Executive Briefing Day by Day

### Day 1: The Manager's Financial Role

- Letting Go of Hands-On Technical Work — Where Manager Time Creates Most Value
- Reading the Income Statement and Cost Lines — How Department Spending Affects Results
- Capital Versus Operating Expenditure — Which Approval Route a Request Follows
- Cost Centre Accountability Map — Who Owns Each Spending Line
- Finance Business Partner Relationship — Early Alignment Before Budget Rounds

### Day 2: Building and Controlling the Budget

- Zero-Based and Incremental Budgeting — Choosing the Approach for the Department
- Cost Driver Modelling for Headcount and Equipment — Realistic Annual Figures
- Monthly Variance Analysis — Explaining Overspend and Underspend to Directors
- Rolling Forecast Updates — Reallocating Funds When Technical Priorities Shift
- Budget Negotiation With Specialists in the Team — Fair Resource Trade-Offs

### Day 3: Investment Appraisal and Business Cases

- Payback Period and Net Present Value — Ranking Technical Investment Options
- Total Cost of Ownership — Comparing Equipment, Software and Outsourcing Choices
- Options Appraisal With a Do-Nothing Baseline — Making Trade-Offs Visible
- Benefits Register and Tracking Measures — Proving Value After Approval
- One-Page Business Case Structure — Getting a Clear Yes or No

### Day 4: Briefing Executives and Non-Technical Audiences

- Decision-First Briefing Structure — Stating the Ask Before the Evidence
- Translating Technical Risk Into Business Exposure — Board-Level Risk Appetite
- Stakeholder Interest Mapping for Funding Decisions — Who Needs Which Message
- Single-Chart Data Storytelling — Presenting Cost and Performance Trends Clearly
- Handling Challenge Questions From Senior Leaders — Credible Answers Under Pressure

## Day 5: Practising the Technical Budget and Executive Briefing Pack

- Departmental Budget Draft With Variance Commentary — Peer Finance Review
- Investment Case Rehearsal Using Appraisal Figures — Mock Capital Committee
- Five-Minute Executive Briefing Delivery — Feedback on Clarity and Ask
- Decision Log for Contested Spending Requests — Transparent Choices for the Team
- Completing the Technical Budget and Executive Briefing Pack — Ready for Approval

## Applying Technical Manager Budgets and Executive Briefing After the Course

- Lead a monthly variance review with the finance business partner, using the cost driver model to explain each material difference.
- Rewrite a pending equipment request as a one-page business case and present it in a decision-first briefing.

## Technical Manager Budgets and Executive Briefing Questions FAQ

### What is Technical Manager Budgets and Executive Briefing and why does it matter now?

It is how a new technical manager plans and controls spending and briefs senior leaders on investments. It matters because funding decisions now demand clear business cases.

### Which roles gain most from Technical Manager Budgets and Executive Briefing?

Engineers, scientists and specialists in their first management role gain most, such as reliability leads in manufacturing plants and clinical engineering managers in hospitals.

### How does Technical Manager Budgets and Executive Briefing differ from a general technical leadership course?

It concentrates on money and upward communication rather than coaching, delegation or leading former peers, which a broader leadership transition course covers.

### What do you bring back from Technical Manager Budgets and Executive Briefing?

You bring back a drafted departmental budget with variance commentary, a one-page investment case and a rehearsed executive briefing, ready for your next budget round.

## Technical Manager Budgets and Executive Briefing: The Way Forward

The Technical Budget and Executive Briefing Pack first informs the next budget submission and the investment request most at risk of deferral. The technical manager, the finance business partner and the executive sponsor all use it. After its first capital committee, revisit how well the briefing anticipated the questions asked, and adjust the cost drivers as actual spending reveals where the estimates were too optimistic.