



*Training Course:
Preparing & Monitoring Budgets and Analyzing
Costs*

*1 - 5 December 2025
Lisbon (Portugal)*

Training Course: Preparing & Monitoring Budgets and Analyzing Costs

Training Course code: FI235404 From: 1 - 5 December 2025 Venue: Lisbon (Portugal) - Training Course Fees: 5750 € Euro

Introduction

Organizations today face increasing financial challenges that require a high level of efficiency in preparing and monitoring budgets and cost analysis. The budget is a vital tool in planning and managing financial resources, and it enables management to make informed decisions that enhance the effectiveness of institutional performance. This advanced training course aims to provide participants with the knowledge and skills necessary to develop accurate budgets, effectively monitor them, and analyze costs in ways that help improve the financial performance of the institution.

Course Objectives

- Develop budget preparation skills: Understand the different methods of budget preparation in line with the institution's needs and strategies.
- Enhance financial monitoring capabilities: Learn how to monitor the budget, identify and analyze deviations, and take the necessary corrective actions.
- Effectively analyze costs: Acquire the skills necessary to analyze different types of costs and their impact on financial and administrative decisions.
- Prepare advanced financial reports: Learn how to prepare comprehensive and value-added financial reports for senior management to assist them in making strategic decisions.
- Practical applications: Apply theoretical knowledge through practical training and real-world case studies to improve the understanding and practical capabilities of participants.

Target Audience

- Financial managers: who want to improve their skills in preparing, monitoring, and analyzing budgets and costs.
- Budget analysts: who are looking to develop their skills in cost analysis and provide accurate and comprehensive financial reports.
- Cost managers: who want to improve their understanding of costs and analyze them in ways that contribute to improving financial performance.
- Accountants: who are seeking to deepen their knowledge in budget preparation and analysis in ways that contribute to improving financial performance.

Outlines

Day 1: Introduction to Budget Preparation

- The concept of the budget and its role in financial planning
- Definition of the budget and its importance
- Types of budgets capital, operating, cash
- Main budget components
- Expected revenue
- Direct and indirect costs
- Operating and capital expenditures
- Budget preparation methods
- Traditional method Top-Down, Bottom-Up
- Zero-based budgeting
- Continuous budgeting
- Practical exercise: Preparing a simple budget

Day 2: Budget Monitoring and Financial Performance Management

- Budget monitoring tools
- Comparing the actual budget to the plan
- Key performance indicators KPIs
- Analyzing the gaps between the actual and planned budget
- Causes of positive and negative deviations
- Ways to correct deviations
- Financial performance monitoring reports
- Types of periodic reports
- How to prepare a monthly budget monitoring report
- Practical exercise: Preparing a budget monitoring report and analyzing deviations

Day 3: Cost Analysis

- Introduction to cost analysis
- The concept of costs and their types
- The difference between fixed and variable costs
- Cost-Volume-Profit CVP Analysis
- Break-even point
- Margin analysis
- Decision-making costs
- Relevant and irrelevant costs
- Differential cost analysis
- Practical exercise: Applying cost analysis in different scenarios

Day 4: Preparing Advanced Financial Reports

- Financial analysis and financial reporting
- Understanding basic financial statements balance sheet, income statement, cash flow statement
- Using financial ratios to analyze performance
- Profitability, liquidity, efficiency, and solvency ratios
- Preparing financial reports for senior management
- Designing reports according to management needs
- Providing financial recommendations
- Practical exercise: Preparing a comprehensive financial report and analyzing performance

Day 5: Practical Applications and Case Studies

- Real-world case studies in budget preparation
- Analysis and study of cases from global and local companies
- Final project: Preparing and monitoring the budget of a virtual company
- Dividing participants into work teams
- Preparing a comprehensive budget

- Monitoring performance and analyzing costs
- Presenting and discussing team projects
- Submitting final projects
- Discussing challenges and successes
- Course conclusion and certificate distribution
- Summary of key points
- Distribution of course completion certificates

Registration form on the Training Course: Preparing & Monitoring Budgets and Analyzing Costs

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Complete & Mail or fax to Global Horizon Training Center (GHTC) at the address given below

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