



*Training Course:
Financial Planning & Budgeting for Businesses*

*28 September - 2 October 2026
Lisbon (Portugal)*

Training Course: Financial Planning & Budgeting for Businesses

Training Course code: FI8077 From: 28 September - 2 October 2026 Venue: Lisbon (Portugal) - Training Course Fees: 6050 € Euro

Introduction

In a fast-paced and competitive business environment, financial planning and budgeting are vital tools for driving sustainable growth, aligning resources with strategic goals, and ensuring long-term profitability. Effective budgeting not only controls expenditures but also provides a framework for informed decision-making and performance measurement.

The "Financial Planning & Budgeting for Businesses" training program, developed by Global Horizon Training Center, equips professionals with practical financial tools and strategic budgeting techniques to enhance financial control, improve forecasting accuracy, and align departmental and corporate objectives.

Course Objectives

By the end of this course, participants will be able to:

- Understand core concepts of financial planning and budgeting
- Develop comprehensive financial plans aligned with organizational goals
- Prepare and manage operational and capital budgets
- Use forecasting techniques and variance analysis to improve financial performance
- Implement best practices for cost control and resource optimization
- Enhance communication between finance and other departments

Course Methodology

The course will employ a practical, interactive approach including:

- Instructor-led presentations and real-life case studies
- Hands-on budgeting exercises and simulations
- Group discussions and financial planning workshops
- Templates, models, and spreadsheets for immediate workplace application
- Interactive tools for forecasting and performance evaluation

Organizational Impact

By attending this course, organizations will benefit through:

- Improved alignment between strategic planning and budgeting
- More accurate forecasts and better use of financial resources
- Greater financial discipline across departments
- Enhanced cross-functional collaboration on financial matters
- Informed leadership with the ability to make data-driven decisions

Target Audience

This program is ideal for:

- Corporate Affairs & Support Services professionals
- Department heads and business unit managers
- Financial analysts and budget officers
- Project managers responsible for cost control
- Anyone involved in planning, forecasting, or financial reporting

Outlines

Day 1: Fundamentals of Financial Planning

- Objectives and components of financial planning
- Role of financial planning in business strategy
- Understanding financial statements and performance indicators
- Linking operational goals to financial outcomes

Day 2: Budgeting Principles and Frameworks

- Types of budgets: operational, capital, cash, and master budgets
- Top-down vs. bottom-up budgeting approaches
- Setting financial targets and budget assumptions

- Tools for preparing departmental budgets
- Exercise: Developing a departmental budget plan

Day 3: Forecasting and Financial Analysis

- Forecasting methods: historical trends, regression, and scenario analysis
- Sensitivity and "what-if" analysis
- Revenue and expenditure forecasting
- Variance analysis: identifying gaps and taking corrective actions
- Case Study: Budget vs. Actual Analysis in a real business scenario

Day 4: Cost Control and Resource Allocation

- Cost classification and behavior
- Identifying cost drivers and reducing inefficiencies
- Activity-based budgeting ABB and zero-based budgeting ZBB
- Strategic resource allocation and prioritization
- Interactive Exercise: Building a cost-control plan

Day 5: Strategic Budgeting and Financial Decision-Making

- Integrating budgeting into strategic planning
- Evaluating investment projects using financial tools NPV, ROI, Payback
- Communicating financial plans to non-financial stakeholders
- Dashboard reporting and performance tracking

Registration form on the Training Course: Financial Planning & Budgeting for Businesses

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