



Data-Driven Budget Planning and Forecasting Training Course

3 – 7 May 2027
Jakarta

Data-Driven Budget Planning and Forecasting Training Course

Ref: 823_162354 **Date:** 3 – 7 May 2027 **Location:** Jakarta **Fees:** 5700 Euro

Overview

Data-Driven Budget Planning and Forecasting Training Course is a one-week intermediate course for budget analysts, finance partners, planning teams, department managers, and performance professionals who leave with a Budget Decision and Forecast Pack. Participants connect business drivers to costs and revenues, establish baselines, build forecasts, test scenarios and sensitivities, allocate resources, analyze variances, update rolling forecasts, and present decisions with uncertainty and performance evidence. Agile Leaders Training Center develops data-driven budgeting capability.

Who Should Attend

- Budget functions responsible for assumptions, submissions, consolidation, challenge, and control
- Finance business partners responsible for drivers, forecasts, variances, and management decisions
- Planning functions responsible for scenarios, demand, capacity, and resource requirements
- Department management functions responsible for spending priorities and budget ownership
- Performance functions responsible for measures, targets, outcomes, and review routines
- Data and reporting functions responsible for budget datasets, models, dashboards, and quality

The course assumes participants can work with budgets, spreadsheets, basic financial statements, and percentages, and leaves out statutory accounting, treasury operations, advanced econometrics, and formal finance certification preparation.

Departments and Industries

The course supports departments and industries that allocate resources under changing demand, cost, performance, and risk conditions.

- Finance, budgeting, planning, performance, strategy, and management accounting
- Operations, procurement, human resources, projects, sales, and service departments
- Financial services, retail, telecommunications, technology, and professional services
- Manufacturing, logistics, utilities, transport, healthcare, and hospitality
- Education, nonprofit, public-service, and infrastructure organizations

Learning Objectives

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



- Build budget drivers, assumptions, and data controls
- Apply demand, cost, and revenue forecasting methods
- Analyze scenarios, sensitivities, and budget risks
- Compare allocation choices using performance evidence
- Evaluate variances and update rolling forecasts
- Build a Budget Decision and Forecast Pack

Course Agenda

Day 1: Build Budget Data and Drivers

- Budget Decision and Responsibility Map
- Data Source and Quality Checklist
- Cost, Revenue, Volume, and Capacity Driver Register
- Baseline and Historical Trend Profile
- Assumption Ownership and Approval Log

Day 2: Develop Forecasts and Resource Requirements

- Demand and Workload Forecast
- Fixed, Variable, and Step-Cost Model
- Revenue and Funding Projection
- Workforce and Capacity Requirement Model
- Forecast Accuracy and Bias Review

Day 3: Test Scenarios, Sensitivities, and Risks

- Base, Upside, and Downside Scenario
- Budget Sensitivity Analysis
- Critical Assumption and Threshold Review
- Risk, Contingency, and Management Reserve Register
- Uncertainty Range and Decision Trigger

Day 4: Allocate Resources and Link Performance

- Allocation Criteria and Constraint Matrix
- Driver-Based Budget Model
- Performance-Informed Funding Review
- Option Trade-Off and Value Assessment
- Budget Challenge and Decision Record



Day 5: Monitor Variances and Reforecast

- Price, Volume, Mix, and Timing Variance Analysis
- Rolling Forecast Update Cycle
- Budget and Performance Dashboard
- Exercise: Reallocate Under a Changed Scenario
- Capstone: Budget Decision and Forecast Pack

Practical Exercises

The course uses suggested activities based on departmental, operational, project, workforce, service, and capital-budget scenarios.

- Suggested activity: identify budget drivers, validate source data, establish a baseline, and document assumptions.
- Suggested activity: forecast demand, cost, revenue, workforce, and capacity requirements.
- Suggested activity: test scenarios and sensitivities, identify critical assumptions, and define decision triggers.
- Suggested activity: explain variances, update a rolling forecast, and recommend a resource allocation.

FAQs

Who suits data-driven budget planning training, and what does it assume?

Budget, finance partnering, planning, department management, performance, data, and reporting functions suit the training; it assumes routine work with budgets, spreadsheets, financial statements, and percentages.

How does driver-based budgeting differ from incremental budgeting?

Driver-based budgeting estimates resources from operational relationships such as volume, workload, price, capacity, and service levels. Incremental budgeting starts from prior amounts and adjusts them, which may preserve outdated assumptions.

What is the difference between sensitivity and scenario analysis?

Sensitivity analysis changes one assumption at a time to show its effect. Scenario analysis changes a coherent set of assumptions together to represent a plausible future and its combined budget impact.

How should performance information affect allocations?

Performance information should inform challenge, prioritization, evaluation, and learning alongside strategy, need, cost, capacity, risk, statutory duties, and evidence quality. A single indicator should not mechanically determine funding.



How are rolling forecasts governed?

Rolling forecasts need defined update frequency, horizon, owners, data cutoffs, assumption controls, forecast-error reviews, scenario triggers, approvals, version history, reconciliation to plans, and communication of changes and uncertainty.

Conclusion

Participants take back a Budget Decision and Forecast Pack containing data checks, driver registers, baselines, forecasts, scenario and sensitivity models, risk registers, allocation matrices, variance analyses, rolling forecasts, dashboards, and decision records. It connects resources, operational drivers, performance, risk, and uncertainty. The pack provides a repeatable structure for challenge, allocation, monitoring, and reforecasting.