



Agile Budgeting and Adaptive Financial Planning Training Course

20 – 24 September 2027
San Diego



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Ref: 1305_196487 **Date:** 20 – 24 September 2027 **Location:** San Diego **Fees:** 14000 Euro

Overview

Agile Budgeting and Adaptive Financial Planning Training Course is a one-week advanced course for finance managers, FP&A professionals, budget owners, finance business partners, and operational leaders who leave with an Adaptive Budgeting and Planning Operating Pack. Participants integrate agile budgeting, adaptive financial planning, rolling forecasts, driver-based planning, scenario modelling, dynamic resource allocation, and decision cadence. The course uses agile to describe responsive finance management, not Scrum ceremonies or software-project delivery. Agile Leaders Training Center presents budgeting as a continuous decision process linked to strategy and operating evidence.

Who Should Attend

- Finance managers responsible for planning, budgeting, and forecasting
- FP&A professionals building forward-looking models and insights
- Budget owners managing resources under changing assumptions
- Finance business partners connecting financial and operational plans
- Operational leaders contributing drivers, scenarios, and decisions

The course assumes experience with budgets, forecasts, financial statements, and management reporting. It excludes basic accounting, software certification, investment valuation, and Agile project-management methods.

Departments and Industries

The course supports organizations that need faster financial decisions under uncertainty.

- Finance, FP&A, controllership, and performance-management functions
- Strategy, operations, commercial, supply-chain, and workforce-planning teams
- Manufacturing, services, technology, retail, healthcare, and energy organizations
- Public entities and nonprofit organizations managing constrained resources
- Business units operating in volatile demand, cost, or funding environments

Learning Objectives

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



- Diagnose where fixed annual budgeting fails to support timely decisions
- Design rolling forecast horizons, update cycles, and ownership
- Build driver-based models connecting operations to financial outcomes
- Use scenarios, triggers, ranges, and guardrails to manage uncertainty
- Allocate resources dynamically while maintaining financial control
- Establish decision cadence, forecast review, learning, and accountability

Course Agenda

Day 1: Agile Budgeting and Planning Architecture

- Annual Budget Constraint and Decision-Latency Map
- Strategy, Target, Plan, Forecast, and Resource Distinction
- Adaptive Planning Governance and Decision-Rights Matrix
- Planning Horizon, Granularity, and Update-Cycle Design
- Finance and Business Partnership Charter

Day 2: Drivers and Rolling Forecasts

- Operational and Financial Driver Tree
- Driver Definition, Ownership, and Data-Quality Register
- Rolling Forecast Horizon and Calendar
- Baseline, Actual, Outlook, and Target Reconciliation
- Forecast Bias, Error, and Assumption Review

Day 3: Scenarios and Dynamic Resource Allocation

- Uncertainty, Trigger, and Scenario Map
- Base, Upside, Downside, and Stress Scenario Model
- Funding Guardrail and Delegated Authority Framework
- Dynamic Resource Allocation Decision Canvas
- Strategic Initiative and Capacity Trade-Off Matrix

Day 4: Performance, Variance, and Decision Cadence

- Controllable, Uncontrollable, Volume, Price, and Mix Variance Map
- Relative Targets and Directional Performance Measures
- Monthly and Quarterly Decision-Cadence Design
- Management Narrative and Forward-Looking Insight Template
- Escalation, Intervention, and Reforecast Trigger Protocol



Day 5: Adaptive Finance Practice

- Exercise: Budget Process and Decision-Latency Diagnosis
- Exercise: Driver-Based Rolling Forecast Build
- Exercise: Scenario and Resource-Allocation Decision
- Exercise: Forecast Review and Management Narrative
- Capstone Exercise: Adaptive Budgeting and Planning Operating Pack

Practical Exercises

The course uses suggested business cases that connect modelling choices with management decisions.

- Suggested activity: convert a fixed annual budget into a rolling planning architecture.
- Suggested activity: build a driver tree and test operating assumptions.
- Suggested activity: compare resource choices under base, downside, and upside scenarios.
- Suggested activity: run a decision meeting using updated forecasts, guardrails, and triggers.

FAQs

What is agile budgeting?

Agile budgeting is a responsive finance approach that updates assumptions, forecasts, and resource decisions as evidence changes while retaining clear controls and strategic direction.

How is a rolling forecast different from a budget?

A budget commonly authorizes resources and sets expectations for a fixed period. A rolling forecast extends the outlook continuously and provides an updated, unbiased view of likely performance.

What is driver-based planning?

Driver-based planning models the operational factors that cause financial results, such as volume, price, staffing, capacity, conversion, or service demand, instead of relying only on historical line-item trends.

How does dynamic resource allocation maintain control?

It uses decision rights, funding guardrails, thresholds, evidence requirements, portfolio priorities, and review cadence to move resources without abandoning accountability.

Does this course teach Scrum or Agile project management?

No. It focuses on adaptive budgeting and finance management. Agile project-delivery frameworks are outside its scope.



Conclusion

The course integrates agile budgeting, rolling forecasts, driver models, scenarios, dynamic resource allocation, variance insight, and decision cadence. Participants take back an Adaptive Budgeting and Planning Operating Pack containing governance maps, driver trees, forecast calendars, scenario models, guardrails, and review templates. The pack turns budgeting from a static annual event into a controlled cycle of evidence, decisions, and learning.