



PB INSTITUTE OF RESEARCH AND TECHNOLOGY

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Nairobi - Kenya

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Budget Leadership Masterclass: From Strategic Planning to Execution

Duration: 5 days

On-Site

01 Who Should Attend

- Management accountants
- Financial analysts
- Corporate planning professionals
- Departmental and business-unit managers
- Project and programme managers
- Treasury professionals
- Procurement and operations managers
- Strategy and performance-management professionals
- Public-sector finance and budget professionals
- Senior executives responsible for financial planning and performance



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02 About the Course

Strategic Budget Development & Execution Mastery is an advanced practical training course designed to equip finance, budgeting, FP&A, accounting, strategy, and management professionals with the skills required to develop robust budgets and translate approved financial plans into effective execution.

The course covers the complete budgeting cycle—from strategic planning, budget formulation, forecasting, resource allocation, and stakeholder engagement to budget execution, monitoring, variance analysis, corrective action, and performance reporting. Participants will learn how to build realistic, flexible, and strategically aligned budgets while strengthening financial discipline, accountability, and organizational performance.

03 Workshop Objectives

- Master the complete budget development lifecycle.
- Implement best practices for accurate financial forecasting.
- Effectively engage stakeholders to build consensus and secure approval.
- Establish robust controls to monitor budget execution.
- Analyze budget performance and identify key variances.
- Develop strategies for managing and mitigating budgetary risks.
- Utilize technology to streamline the budgeting process.

04 Module Topics

Module 1: Foundational Principles of Budgeting



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- Understanding the strategic role of a budget.
- The difference between forecasting and budgeting.
- Key players and their roles in the budget process.
- Best practices for establishing a budget calendar.
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Module 2: The Budget Development Process

- Data collection and analysis for a strong foundation.
- Methods for cost estimation and revenue projection.
- Zero-based budgeting vs. incremental budgeting.
- Creating a master budget and subsidiary budgets.
- Building a budget presentation for approval.

Module 3: Stakeholder Engagement and Communication

- Identifying and understanding key stakeholders.
- Strategies for engaging department heads and teams.
- Communicating the financial narrative effectively.
- Managing expectations and addressing concerns.
- Gaining buy-in and building a culture of accountability.

Module 4: Budget Execution and Monitoring

- Turning the budget plan into actionable steps.
- Setting up a system for continuous tracking.
- The importance of regular performance reviews.
- Tools and techniques for real-time monitoring.
- Ensuring compliance with budget policies.

Module 5: Performance Measurement and Reporting



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- ▶ Conducting a comprehensive variance analysis.
- ▶ Creating clear and actionable financial reports.
- ▶ Key Performance Indicators (KPIs) for budget health.
- ▶ Benchmarking and measuring against strategic goals.
- ▶ Presenting results to senior management and boards.

Module 6: Corrective Actions and Revisions

- ▶ Identifying the root cause of budget variances.
- ▶ Strategies for cost containment and reallocation.
- ▶ The process for formal budget adjustments.
- ▶ Managing unforeseen events and financial shocks.
- ▶ The role of contingency planning.

Module 7: Modern Budgeting Technology and Trends

- ▶ An overview of budget management software.
- ▶ Leveraging data analytics for better insights.
- ▶ The move towards dynamic and rolling forecasts.
- ▶ Implementing automation in the budget process.
- ▶ The future of artificial intelligence in financial planning.