



Integrated Planning and Performance Management Excellence Training Course

Ref: #BUI1349



Course Introduction / Overview:

This course provides a comprehensive framework for mastering Integrated Business Planning (IBP) and Corporate Performance Management (CPM). It is designed to bridge the critical gap between strategic planning and operational execution, a challenge many organizations face. The curriculum delves into the principles articulated by thought leaders like Robert S. Kaplan and David P. Norton, renowned for their work on the Balanced Scorecard, which revolutionized how organizations measure performance. We will explore concepts from seminal works such as "The Execution Premium: Linking Strategy to Operations for Competitive Advantage," demonstrating how to translate high-level strategic objectives into tangible, measurable results. This program offered by BIG BEN Training Center moves beyond traditional Sales and Operations Planning (S&OP) by integrating financial planning, product portfolio management, and strategic initiatives into a single, cohesive process. Participants will learn to create a transparent, cross-functional planning environment that fosters accountability, improves decision-making, and drives sustainable growth. By mastering both the planning and performance management cycles, attendees will be equipped to lead their organizations toward operational excellence and achieve superior business outcomes through strategic alignment and data-driven insights.

Target Audience / This training course is suitable for:



- Strategic Planners and Corporate Strategists.
- Finance Managers, Controllers, and Financial Analysts.
- Supply Chain and Operations Managers.
- Demand Planners and Forecasters.
- Sales and Marketing Directors.
- Business Unit and Department Heads.
- Performance Management Specialists.
- Project and Program Managers.
- IT professionals involved in EPM/CPM systems.
- Executives and Senior Leaders seeking to drive alignment.

Target Sectors and Industries:

- Manufacturing and Industrial Production.
- Consumer Packaged Goods (CPG) and Retail.
- Pharmaceuticals and Healthcare.
- Technology and Telecommunications.
- Logistics and Distribution.
- Financial Services and Banking.
- Energy and Utilities.
- Governmental Agencies and Public Sector Organizations.
- Aerospace and Defense.

Target Organizations Departments:



- Finance and Accounting.
- Strategic Planning and Corporate Development.
- Supply Chain Management.
- Operations and Production.
- Sales and Commercial Teams.
- Marketing and Product Management.
- Human Resources.
- Information Technology (IT).
- Executive Management.

Course Offerings:

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

- Develop a robust Integrated Business Planning (IBP) framework tailored to their organization.
- Align strategic objectives with operational plans and financial forecasts effectively.
- Master advanced demand and supply planning techniques for optimized resource allocation.
- Implement comprehensive performance management systems like the Balanced Scorecard.
- Design and track meaningful Key Performance Indicators (KPIs) that drive desired behaviors.
- Facilitate cross-functional collaboration and communication within the IBP cycle.
- Integrate financial planning and analysis seamlessly into the operational planning process.
- Leverage data and analytics to support strategic and tactical decision-making.
- Lead change management initiatives for successful IBP and CPM implementation.
- Conduct effective executive IBP meetings to ensure strategic alignment and accountability.

Course Methodology:



The training methodology at BIG BEN Training Center is designed to be highly interactive, engaging, and practical, ensuring that participants can immediately apply their learning in the workplace. We believe in a blended learning approach that combines expert-led instruction with hands-on application. The course will feature in-depth presentations on core concepts, frameworks, and best practices in integrated planning and performance management. These sessions are complemented by real-world case studies from various industries, allowing participants to analyze complex business scenarios and understand the practical challenges of implementation. A significant portion of the training is dedicated to collaborative group exercises, workshops, and business simulations where attendees work in teams to solve problems, develop strategic plans, and design performance dashboards. This fosters a dynamic learning environment and encourages peer-to-peer knowledge sharing. Throughout the course, there will be ample opportunities for open discussions, Q&A sessions, and personalized feedback from the instructor. This participant-centered approach ensures a deep understanding of the material and equips attendees with the confidence and skills to drive performance excellence within their organizations.

Course Agenda (Course Units):

Unit One: Foundations of Strategic Planning and Performance



- Introduction to Integrated Business Planning (IBP) and its evolution from S&OP.
- The critical link between strategic planning and operational execution.
- Understanding the core principles of Corporate Performance Management (CPM).
- Exploring foundational frameworks like the Balanced Scorecard.
- Defining the roles and responsibilities within the IBP process.
- Assessing organizational readiness and maturity for IBP implementation.
- Identifying common pitfalls in planning and performance management.

Unit Two: The Integrated Business Planning Cycle

- The five-step IBP process overview.
- Step 1: Product and Portfolio Management Review.
- Step 2: Demand Review and Consensus Forecasting.
- Advanced forecasting techniques and demand sensing.
- Step 3: Supply Review and Capacity Planning.
- Inventory optimization and supply chain constraints analysis.
- Managing risks and opportunities in the planning cycle.

Unit Three: Financial Integration and Executive Alignment

- Step 4: Integrated Reconciliation and Financial Review.
- Translating operational plans into financial projections (P&L, Cash Flow).
- Scenario planning and gap analysis against business targets.
- Preparing for the executive meeting.
- Step 5: The Executive Business Review (EBR).
- Making key decisions and authorizing plans.
- Communicating outcomes and driving accountability across the organization.

Unit Four: Designing and Implementing Performance Metrics



- Developing a performance management framework.
- The art of creating meaningful Key Performance Indicators (KPIs).
- Distinguishing between leading and lagging indicators.
- Cascading strategic objectives into departmental and individual goals.
- Building effective performance dashboards and scorecards.
- Data visualization techniques for impactful reporting.
- Linking performance metrics to compensation and rewards.

Unit Five: Leadership, Technology, and Continuous Improvement

- The role of leadership in driving a performance-oriented culture.
- Change management strategies for successful IBP and CPM adoption.
- Evaluating and selecting technology solutions to support the process.
- The future of planning: Predictive analytics and artificial intelligence.
- Establishing a continuous improvement cycle for the IBP process.
- Case studies of successful IBP implementations.
- Developing a personalized action plan for implementation.

FAQ:

Qualifications required for registering to this course?

There are no requirements.

How long is each daily session, and what is the total number of training hours for the course?

This training course spans five days, with daily sessions ranging between 4 to 5 hours, including breaks and interactive activities, bringing the total duration to 20 - 25 training hours.

Something to think about:



How can an organization effectively balance the need for standardized, globally integrated planning processes with the flexibility required to adapt to unique local market dynamics?

What unique qualities does this course offer compared to other courses?

This course distinguishes itself by offering a truly holistic and integrated perspective, seamlessly weaving together the disciplines of strategic planning, operational execution, and performance management. Unlike other programs that may treat these topics in isolation, our curriculum is built on the core principle that they are inseparable components of a single value-creation cycle. We move beyond theoretical frameworks to provide a practical, implementation-focused roadmap, equipping participants with the tools to not only design but also successfully deploy and sustain an IBP and CPM system. The content emphasizes the critical "soft skills" of leadership, change management, and cross-functional facilitation, which are often the deciding factors in the success of such initiatives. Furthermore, the course content is dynamic, incorporating the latest trends in predictive analytics and technology enablement while remaining grounded in timeless principles of business management. By focusing on the integration of finance, supply chain, sales, and strategy, participants gain a unique, enterprise-wide viewpoint that empowers them to break down organizational silos and drive a culture of accountability and continuous improvement.