Integrated Business Planning and Strategic Forecasting Training Course



21 - 25 Dec 2026

Lisbon

4500 € (Per Person)

Ref: #PLA2663_127383

Course Introduction / Overview:

Integrated Business Planning (IBP) represents a paradigm shift from traditional Sales and Operations Planning (S&OP), evolving into a comprehensive management process that aligns the entire organization around a single, achievable business plan. This intensive training course is designed to provide a complete A to Z understanding of how to successfully implement and sustain a world-class IBP process. We will explore how IBP integrates portfolio management, demand planning, supply planning, and financial planning into a unified strategic framework. As highlighted by experts like Thomas F. Wallace in his foundational work, "Sales and Operations Planning: The How-To Handbook", the goal is to drive strategic alignment and enhance decision-making. This course offered by BIG BEN Training Center moves beyond theory, focusing on the practical application of IBP principles to improve profitability, optimize inventory, and increase customer satisfaction. Participants will learn to break down functional silos, foster cross-functional collaboration, and use predictive analytics to create accurate and reliable forecasts. By mastering the IBP cycle, your organization can proactively manage risk, capitalize on opportunities, and achieve its strategic objectives with greater certainty and control.

Target Audience / This training course is suitable for:

- Supply Chain Managers and Directors.
- Demand Planners and Forecasting Analysts.
- Financial Planners and Controllers.
- Operations and Production Managers.
- Sales and Marketing Managers.
- Product and Portfolio Managers.
- Executive Leadership and Business Unit Heads.
- IT professionals involved in S&OP/IBP systems.
- Strategic Planning Professionals.

Target Sectors and Industries:

- Manufacturing and Industrial Production.
- Consumer Packaged Goods (CPG) and Fast-Moving Consumer Goods (FMCG).
- Retail and E-commerce.
- Pharmaceuticals and Healthcare.
- Technology and Electronics.
- Automotive and Aerospace.
- Governmental agencies and public sector organizations.
- Logistics and Distribution.

Target Organizations Departments:

- Supply Chain and Logistics.
- Finance and Accounting.
- Sales and Commercial Operations.
- Marketing and Product Management.
- Manufacturing and Operations.
- Strategic Planning and Corporate Development.
- Procurement and Sourcing.
- Information Technology.

Course Offerings:

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

- Develop a comprehensive understanding of the evolution from S&OP to IBP.
- Master the five-step IBP process from product review to executive business review.
- Implement advanced demand forecasting techniques for improved accuracy.
- Integrate financial planning and analysis directly into the operational plan.
- Align supply chain capabilities with strategic business objectives and demand forecasts.
- Facilitate cross-functional collaboration and consensus-building meetings.
- Develop and monitor key performance indicators (KPIs) to measure IBP effectiveness.
- Create robust scenario plans to mitigate risks and capitalize on opportunities.
- Lead change management initiatives for a successful IBP implementation.
- Evaluate and leverage technology to support the IBP process.

Course Methodology:

The training methodology at BIG BEN Training Center is designed to be highly interactive, practical, and engaging, ensuring that participants can immediately apply their learning in the workplace. This course moves beyond traditional lectures by incorporating a blended learning approach. We utilize real-world case studies from various industries to illustrate the challenges and successes of IBP implementation. Participants will engage in hands-on workshops and group exercises that simulate the IBP cycle, including demand review and integrated reconciliation meetings. These activities foster teamwork and allow for the practical application of forecasting models and scenario planning techniques. Expert-led sessions will provide deep insights into best practices, while interactive discussions and Q&A segments encourage knowledge sharing among peers. A significant portion of the course is dedicated to building a mock IBP implementation plan, allowing participants to tackle realistic challenges. Continuous feedback from the instructor ensures a supportive and effective learning environment, empowering attendees with the confidence and skills to drive IBP excellence within their organizations.

Course Agenda (Course Units):

Unit One: Foundations of Integrated Business Planning (IBP)

- The Evolution from S&OP to IBP.
- Core Principles and Objectives of IBP.
- Understanding the IBP Maturity Model.
- The Strategic Importance of Cross-Functional Alignment.
- Key Roles and Responsibilities in the IBP Process.
- Linking Corporate Strategy with Operational Execution.
- Identifying Common Pitfalls in S&OP and IBP Implementation.

Unit Two: The Five-Step IBP Cycle in Detail

- Step 1: Product Management and Portfolio Review.
- Step 2: The Demand Review and Consensus Forecasting.
- Step 3: The Supply Review and Capacity Planning.
- Step 4: The Integrated Reconciliation and Gap Closing.
- Step 5: The Management Business Review for Executive Decision-Making.
- The Monthly IBP Cadence and Meeting Structures.
- Effective Facilitation of IBP Meetings.

Unit Three: Advanced Demand Planning and Forecasting

- Qualitative and Quantitative Forecasting Methods.
- Statistical Forecasting Models (e.g., ARIMA, Exponential Smoothing).
- Demand Sensing and Shaping Strategies.
- Building a Consensus-Based Demand Plan.
- Measuring Forecast Accuracy and Bias (MAPE, WMAPE).
- Incorporating Market Intelligence and Sales Input.
- Leveraging Predictive Analytics and Machine Learning in Forecasting.

Unit Four: Integrating Supply and Financial Planning

- Aligning Supply Chain Strategy with the Business Plan.
- Inventory Optimization and Working Capital Management.
- Rough-Cut Capacity Planning (RCCP) and Resource Management.
- Translating Operational Plans into Financial Projections (P&L, Cash Flow).
- Financial Scenario Modeling and Analysis.
- Bridging the Gap Between Finance and Operations.
- Cost-to-Serve Analysis and Profitability Management.

Unit Five: IBP Implementation, Technology, and Continuous Improvement

- Developing a Roadmap for IBP Implementation.
- Change Management and Securing Executive Sponsorship.
- Selecting and Utilizing IBP Enabling Technologies.
- Defining Key Performance Indicators (KPIs) for IBP Success.
- Conducting IBP Process Health Checks and Audits.
- Sustaining IBP and Driving a Culture of Continuous Improvement.
- The Future of IBP and Digital Transformation.

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 a structured, data-driven IBP process with the agility required to respond to unforeseen market disruptions?

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

This training course distinguishes itself by focusing intensely on the "integration" aspect of IBP, particularly the critical link between operational planning and financial performance. While many courses cover the mechanics of S&OP, this program dedicates significant time to translating demand and supply plans into concrete financial projections, such as P&L statements and cash flow forecasts. This financial acumen empowers participants to communicate the business impact of their plans directly to executive leadership. Furthermore, the curriculum is built around a practical, implementation-focused framework rather than abstract theory. We emphasize the human element of IBP, with dedicated modules on change management, securing leadership buy-in, and facilitating effective cross-functional meetings—skills that are paramount for success but often overlooked. The course uses a blend of advanced forecasting insights and strategic scenario planning, preparing participants not just to react to the future but to actively shape it. It provides a holistic view that connects product portfolio decisions, demand signals, supply capabilities, and financial strategy into one cohesive and powerful business management process.