



## **Strategic Planning, Management Control & Effective Budgeting Workshop**

25 January – 5 February 2027  
Lisbon (Portugal)





## Strategic Planning, Management Control & Effective Budgeting Workshop

**Ref:** 8069\_245829 **Date:** 25 January – 5 February 2027 **Location:** Lisbon (Portugal) **Fees:** 9500 Euro

### Introduction

As the business environment becomes ever more uncertain and turbulent, the requirement for professional leadership and effective management control is at a premium. The strategic planning, management control, and budgeting workshop is designed for those dedicated to maximizing organizations' performance and their value-added contribution and those of those who work for them.

This strategic management control and budget conference provides a structured, coherent, and comprehensive framework for addressing professionals' challenges concerning their day-to-day and longer-term responsibilities.

This strategic planning, management control, and budgeting workshop near me will be particularly relevant to those professionals involved in setting the organization's direction or their function within it who are also accountable for delivering cost-effective processes, activities, and operations.

The strategic planning, management control, and budgeting workshop will provide professionals with a comprehensive range of skills essential to effectively leading people and projects/processes in times of increasing global competition, where budgeting is inextricably linked with strategy formulation, people leadership, and cost analysis.

### Unique Addition: Strategic Planning and Budgeting

Participants will be immersed in aligning budgetary goals with strategic objectives in this integral part of our strategic planning conference. The budget workshop establishes a critical bridge between the organizational vision and financial realities, enabling professionals to craft business strategies underscored by robust, actionable budget plans.

This seamless integration of strategic planning and budgeting demystifies the complex relationship between organizational ambitions, resource constraints, and the practical steps necessary to turn goals into tangible outcomes. Through dynamic sessions and engaging discourse, the strategic planning and budgeting segment promises to equip attendees with the foresight and tools necessary for fiscal acumen and strategic insight.

## Targeted Groups

- Project Managers.
- Head of Departments.
- Budgeting Staff.
- Employees are seeking to gain significant experience in strategic leadership and finance to improve their careers.

## Conference Objectives

At the end of this strategic planning workshop, participants will be able to:

- Develop an appreciation and understanding of strategic planning and management control processes.
- Understand how the elements within them interact to create a systemic approach to the effective and efficient management of organizations, from strategy formulation through to efficient execution.
- Learn how to recognize, manage, and mitigate risk.
- Gain awareness of the kind of leadership that makes a difference, unleashing the potential of everyone on the team.
- Understand the key factors that lead to sustainable business success.
- Think in terms of process value added to customers/shareholders.
- Integrate the organization's strategic planning with budgets and processes of cost control.
- Understand the importance of project management, appraisal, and planning.
- Explore traditional versus innovative budgetary techniques.
- Explore capital and activity-based budgeting techniques.
- Identify the business's critical strategic and financial indicators and how and when to monitor them.
- Discuss the problems and limitations of budgetary control and look for alternatives.
- Understand the importance of balancing financial and non-financial measures in managing projects.
- Link budgetary processes with quality issues and business process improvement.
- Identify priorities for continued professional development.
- Learn a consistent framework for any organizational activity, process, or change.
- Understand the factors involved in using a plan to achieve measurable results.
- Learn techniques to plan, prioritize, and implement effectively.
- Anticipate and prepare for contingencies and changing circumstances.
- Increase levels of confidence in dealing with superiors, peers, and subordinates.
- Gain project management abilities.
- Integrate planning, budgeting, and cost control relying on a financial-based language.
- Manage different types of costs and their relevance to decision-making.
- Understand the problems of overheads and how Activity-Based Analysis may aid decision-making and pricing strategies.
- Select the performance measurement system that works.
- Understand everything from cost to strategy to performance measurement.
- Look beyond budgeting: balanced scorecard, six-sigma, and Business Excellence.
- Develop a comprehensive understanding of what contributes to and creates business success.
- Understand and manage the complexities of organizational realities.

## Targeted Competencies

By the end of this strategic planning, management control, and budgeting workshop, the target competencies will be able to:

- Manage business strategy.
- Manage risk.
- Successful negotiation.
- Leadership skills.
- Learn costing and budgetary analysis.
- Understand the processes to redesign.
- Test the financial impact of strategic direction.
- Balanced Scorecard BSC.

## Conference Content

### Unit 1: Strategy

- Overview of introduction to strategy - background, historical developments, significant theories.
- Think strategically.
- Understand a consistent approach to strategy development.
- Overview of the relationships between vision, mission, and strategy.
- Know the steps involved in developing a strategy.
- Implement a strategy.

### Unit 2: Risks

- Understand the meaning and nature of risk.
- Identify the risks in a given strategy.
- Prioritize risks.
- Contingency planning.
- Risk mitigation strategies.

### **Unit 3: Negotiation**

- The essential role of negotiation.
- Focus on mutual interests.
- How do we separate the people from the problem?
- Remain objective and dispassionate.
- Negotiate with more influential people.
- Negotiating tactics.

### **Unit 4: Leadership**

- The strategic nature of leadership.
- Learn the differences between leadership and management.
- Turn leadership theory into practical leadership.
- Maximize the performance of each team member.
- Motivate the average employee.
- Develop a personal action plan for further self-development.

### **Unit 5: Strategic Leadership**

- Intrapersonal skills.
- Interpersonal skills.
- Strategic leadership for team development.
- Innovative leadership skills.

### **Unit 6: Introduction to Building a Common Financial Language**

- Learn the critical role of budgeting and cost control in contemporary organizations.
- The 21st-century business imperative: delivering value-added but to whom?.
- Know a cross-functional process view of the organization.
- Understand financial vs. managerial accounting for decision-making.
- Understand your processes: integrating financial and non-financial aspects.
- Identify the key processes/projects for your organization.

## **Unit 7: Budgeting and Cost Analysis**

- Cost concepts and terminology.
- Different costs for different purposes.
- Learn about fixed vs. variable costs: the Cost-Volume-Profit analysis model.
- Contribution Margin analysis.
- Manufacturing vs. non-manufacturing costs.
- Learn about period vs. product costs: inventory evaluation and control.

## **Unit 8: Traditional vs. Advanced Techniques in Cost-Control**

- Under-costing and over-costing: the consequences for profitability.
- How to refine a costing system?
- Indirect OH vs. Direct costs: Traditional Cost Allocation systems vs. Activity-Based Costing ABC.
- Know Cost hierarchy and Cost drivers.
- Understand how to link resources, activities, and management.
- Introducing Activity-Based Budgeting ABB and Activity-Based Budgeting Management ABM.

## **Unit 9: Master Budget, Flexible Budgets, and Variance Analysis**

- Define the master budget and explain its significant benefits to an organization.
- Describe the difference between a static budget and a flexible budget.
- Compute flexible-budget variances and sales-volume variances.
- Discuss the behavioral implications of budgeting.
- The budgeting process in your organization: how to improve it?
- Which tools shall we use to complement budgeting and costing?

## **Unit 10: Beyond the Budgets: Balanced Scorecards and Six-Sigma**

- Broaden performance measurement systems.
- Understand the crucial role of customer satisfaction and business process reengineering.
- Beyond budgeting: integrating financial and non-financial issues.
- Introducing the Balanced Scorecard.
- Introduce the Strategy maps.
- Introducing Six-sigma.