



Management And Leadership

# Integrated Planning and Performance Management

## Course Introduction

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In today's dynamic organizational landscape, effective planning and performance management are essential for aligning departmental goals with the organization's overall strategy. This comprehensive program is designed for professionals working in Planning & Performance departments who are responsible for budgeting, expenditure monitoring, business planning cycles, and workforce coordination. The course equips participants with the tools and techniques required to efficiently manage financial and human resources, report on key metrics, and drive strategic execution.

## Target Audience

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- Planning & Performance Managers
- Financial and Budget Analysts
- Business Planning Officers
- Workforce Planners and HR Coordinators
- Strategy and Execution Teams
- Mid-level to Senior Managers

## Learning Objectives

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- Understand the strategic role of planning and performance management in organizational success.
- Monitor, analyze, and report on departmental budgets and expenditures.
- Prepare and manage the business plan cycle including mid-year and year-end reviews.
- Summarize and present monthly financial and performance data effectively.
- Coordinate internal manpower movement and workforce planning.
- Use practical tools and templates to support informed decision-making.

- Align departmental plans with corporate objectives and KPIs.

## Course Outline

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- DAY 01

### Foundations of Planning and Performance

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- Introduction to Strategic and Operational Planning
- Performance Management Cycle
- Role of the Planning Function in Organizations
- Linking Goals, Initiatives, and KPIs

- Day 02

### Budgeting and Financial Oversight

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- Budget Preparation Process
- Budget Monitoring: Overruns and Underruns
- Monthly Expenditure Summary and Reporting
- Financial Forecasting and Cost Control

- Day 03

### Business Planning and Reporting Cycles

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- Business Plan Cycle Framework
- Mid-Year and End-of-Year Performance Reviews
- Tools for Monitoring and Reporting (Dashboards and Scorecards)
- Data-Driven Decision Making

- Day 04

### Workforce Planning and Movement

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- Workforce Planning Strategies

- Managing Internal Transfers and Movements
  - HR Analytics in Resource Allocation
  - Forecasting Staffing Needs
- **Day 04**

**Tools, Templates, and Case Studies**

- Using Excel for Financial and Performance Analysis
- Templates for Monthly and Annual Reporting
- Case Studies from Government and Corporate Sectors
- Final Group Project: Building a Departmental Plan

**Confirmed Sessions**

FROM	TO	DURATION	FEES	LOCATION
Aug. 4, 2025	Aug. 8, 2025	5 days	4950.00 \$	Italy - Milan
Nov. 24, 2025	Nov. 28, 2025	5 days	4250.00 \$	UAE - Abu Dhabi