Integrated Business Planning and Strategy Alignment Training Course

Ref: #PLA7259

Course Introduction / Overview:

This course provides a comprehensive framework for mastering Integrated Business Planning (IBP), a critical process for aligning strategic goals with operational execution to drive profitability and market leadership. In today's volatile business environment, the disconnect between high-level strategy and day-to-day activities is a primary cause of failure. IBP evolves traditional Sales and Operations Planning (S&OP) into a fully integrated management process that connects product and portfolio management, demand planning, supply planning, and strategic financial planning into a single, cohesive plan. Drawing on principles articulated by thought leaders like George E. Palmatier, this program moves beyond theory to offer a practical roadmap for implementation. Participants will explore how to break down functional silos and foster cross-functional collaboration, ensuring that all departments are working towards the same strategic objectives. BIG BEN Training Center has designed this course to empower leaders to make informed, forward-looking decisions based on a unified view of the business, enabling them to proactively manage risk, optimize resource allocation, and ultimately close the gap between strategy and execution for sustainable competitive advantage.

Target Audience / This training course is suitable for:

- Executives and Senior Leadership (CEOs, COOs, CFOs).
- Directors and Heads of Strategy and Corporate Planning.
- Supply Chain and Operations Managers.
- Finance and Commercial Controllers.
- Sales and Marketing Directors.
- Demand and Supply Planners.
- Product and Portfolio Managers.
- Business Process Improvement Specialists.
- Project Managers responsible for strategic initiatives.

Target Sectors and Industries:

- Fast-Moving Consumer Goods (FMCG).
- Manufacturing and Industrial Products.
- Pharmaceuticals and Life Sciences.
- Retail and E-commerce.
- Technology and Electronics.
- Automotive and Aerospace.
- Logistics and Distribution.
- Government Agencies and Public Sector Organizations.

Target Organizations Departments:

- Strategic Planning and Corporate Development.
- Finance and Accounting.
- Supply Chain Management.
- Operations and Production.
- Sales and Marketing.
- Product Management and Development.
- Information Technology.
- Human Resources.
- Procurement and Sourcing.

Course Offerings:

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

- Develop a robust Integrated Business Planning (IBP) process framework tailored to their organization.
- Align operational plans and financial forecasts with long-term strategic goals.
- Master the five-step IBP cycle, from product review to executive business review.
- Implement effective techniques for demand and supply balancing to optimize inventory and service levels.
- Lead cross-functional teams to achieve consensus and commitment to a single operating plan.
- Integrate financial planning, including budgeting and forecasting, directly into the IBP process.
- Design and utilize key performance indicators (KPIs) and dashboards to monitor strategic alignment.
- Conduct effective scenario planning to assess risks and opportunities.
- Champion the change management required for a successful IBP implementation.
- Create a practical roadmap for advancing their organization's IBP maturity.

Course Methodology:

The training methodology at BIG BEN Training Center is designed to be immersive, practical, and highly interactive, ensuring that participants can translate learned concepts into actionable strategies. This course moves beyond traditional lectures by employing a blended learning approach that includes expert-led presentations, in-depth analysis of real-world case studies, and collaborative group workshops. Participants will engage in hands-on exercises and business simulations that replicate the challenges of aligning strategy with operations, allowing them to practice decision-making in a risk-free environment. A significant emphasis is placed on peer-to-peer learning, where professionals from diverse industries share insights and best practices. The facilitator will guide participants in developing a preliminary IBP implementation roadmap for their own organizations. Continuous feedback, interactive Q&A sessions, and structured discussions are integral to the learning process, fostering a dynamic environment where complex theories are demystified and practical application is the primary focus. This approach ensures a deep understanding of the IBP framework and equips participants with the confidence to lead its implementation.

Course Agenda (Course Units):

Unit One Foundations of Strategic Planning and IBP

- The modern strategic landscape and the execution gap.
- Defining corporate strategy, vision, and mission.
- Evolution from Sales & Operations Planning (S&OP) to Integrated Business Planning (IBP).
- The core principles and objectives of IBP.
- Identifying the key stakeholders in the IBP process.
- Building the business case for IBP implementation.
- Assessing your organization's planning maturity level.

Unit Two The Integrated Business Planning Process Cycle

- Overview of the five-step IBP monthly cycle.
- Step 1: Product Management and Portfolio Review.
- Step 2: The Demand Review and achieving consensus forecast.
- Step 3: The Supply Review and capacity planning.
- Step 4: The Integrated Reconciliation and gap-closing.
- Step 5: The Executive Business Review (Executive S&OP).
- Roles, responsibilities, and inputs/outputs for each meeting.

Unit Three Aligning Functional Plans with Corporate Strategy

- Integrating financial planning and analysis into the IBP cycle.
- Linking the annual operating plan (AOP) and budget to the strategic plan.
- Aligning sales and marketing initiatives with the consensus plan.
- Ensuring supply chain strategy supports business objectives.
- Techniques for fostering effective cross-functional collaboration.
- Breaking down organizational silos for seamless planning.
- Managing communication and information flow across departments.

Unit Four Performance Management and Analytics in IBP

- Designing a balanced scorecard for IBP.
- Identifying the right Key Performance Indicators (KPIs) for strategic alignment.
- Developing effective dashboards for the executive review.
- Introduction to predictive and prescriptive analytics in planning.
- Mastering scenario planning and what-if analysis.
- Using data to drive objective, forward-looking decisions.
- Measuring the financial impact and ROI of the IBP process.

Unit Five Leadership, Change Management, and IBP Implementation

- The critical role of executive sponsorship in IBP success.
- Principles of change management for process transformation.
- Creating a compelling vision for change and overcoming resistance.
- Developing a phased IBP implementation roadmap.
- Sustaining IBP and driving continuous improvement.
- The role of technology as an enabler for IBP.
- Final project: Outlining an IBP implementation plan.

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's culture either accelerate or completely derail the successful implementation of a technically sound Integrated Business Planning process?

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

This course distinguishes itself by focusing intently on the strategic integration of planning processes, moving far beyond the operational scope of traditional S&OP courses. Its primary uniqueness lies in its holistic approach, treating financial planning not as a separate activity but as the central nervous system of the IBP framework. We teach participants how to translate operational plans directly into financial outcomes, ensuring every decision is evaluated against strategic financial targets. Another key differentiator is the profound emphasis on leadership and change management. We recognize that IBP is not merely a process or technology implementation but a significant cultural transformation. Therefore, a substantial portion of the curriculum is dedicated to equipping leaders with the skills to champion change, secure executive buy-in, and navigate organizational resistance. The methodology is deeply practical, prioritizing the development of a tangible IBP implementation roadmap over abstract theory. Participants leave not just with knowledge, but with a structured plan and the confidence to bridge the critical gap between strategic intent and operational reality within their own organizations.