COURSE BROCHURE

Operational Planning and Budget Alignment

A planner's-eye course that turns strategic objectives into an annual operating plan and initiative charters, then links them to justified and consistent budget requests.

Code	HT-STR-108
Category	Strategy & Planning
Duration	1 week
Level	Intermediate
City	Amsterdam

Introduction

The operating plan is often prepared in one department and the budget in another, on different calendars, so the organization starts the year with unfunded activities and allocations that do not serve its priorities.

Objectives

- Clarify how the strategic plan, operating plan and budget relate
- Prepare a department's annual operating plan with objectives, outputs and owners
- Write initiative charters that set out scope, milestones and required resources
- Link activities and initiatives to justified budget requests
- Keep the plan aligned with actual allocations during the year

Who should attend

- Planning coordinators in departments and divisions
- Department managers who prepare their own annual plans
- Planning and performance analysts in strategy offices
- Finance staff who review budget requests against plans

Skills you will develop

- Operating plan preparation
- Initiative charter writing
- Budget request justification
- Prioritizing under funding constraints

Learning Outcomes

- Prepare an annual operating plan for the participant's department linked to strategic objectives
- Write two complete initiative charters with resource estimates
- Build a table linking each activity and initiative to its budget line
- Write a budget justification memo and a fallback option for reduced funding

Course Outline

Day 1: The Operating Plan and Its Place

- Strategy, operating plan and budget: different roles, necessary links

- The annual planning calendar and where it meets the budget calendar
- Roles of planning units, finance and department managers

Day 2: Building the Annual Operating Plan

- Translating strategic objectives into departmental operating objectives
- Recurring activities versus improvement initiatives
- Outputs, owners and timelines

Day 3: Initiative Charters

- Charter components: scope, deliverables, milestones and dependencies
- Estimating needs for staff, equipment and services
- Checking capacity against the existing workload

Day 4: Linking the Plan to Budget Requests

- Mapping each activity and initiative to budget lines
- Writing budget justifications that finance can assess
- Prioritizing and phasing when funding falls short

Day 5: Staying Aligned Through the Year

- Quarterly plan reviews and reallocation requests
- Reflecting budget cuts in the plan and its targets
- Applied project: an operating plan with initiative charters and a linked budget request for the participant's department

Training methodology

Work on a sample strategic plan and budget calendar for a fictional entity
Charters written for real initiatives brought by participants
Simulated negotiation between a requesting department and the budget committee
Peer review of justification memos against set criteria

Certification

Participants receive a Harbor Training Center certificate of attendance on completing the course.

Upcoming dates

City	Dates	Language	Fee
Amsterdam	1 – 5 February 2027	EN	EUR 5,500
Amsterdam	2 – 6 August 2027	AR	EUR 5,500

Fees are per participant.

Contact us

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https://harbor4training.com/en/courses/operational-planning-budgeting