

COURSE OVERVIEW TM0241 Planning & Budgeting for Managers

Course Title

Planning & Budgeting for Managers

Course Date/Venue

June 23-27, 2024/Boardroom 1, Elite Byblos Hotel Al Barsha, Sheikh Zayed Road, Dubai, UAE

Course Reference

TM0241

Course Duration/Credits

Five days/3.0 CEUs/30 PDHs

Course Description



This practical and highly-interactive course includes real-life case studies and exercises where participants will be engaged in a series of interactive small groups and class workshops.



Planning and Budgeting supports your strategic objectives by creating an interactive and collaborative planning and budgeting process. It enables companies to evaluate business alternatives, set financial targets, conduct scenario-based what-if analysis, prepare budgets, and adjust to changing economic environments.



This course is designed to provide participants with a detailed and up-to-date overview of planning and budgeting for managers covering company strategy and department strategy; the balanced scorecard, department objective, other department's objectives and carryout department plans; the risk issues, master budget as well as historical and zero based methodology; the budget committee, operating budget and forecasting techniques; cash budgeting and constrained resources; and scheduling, capital budgeting, variance reporting, reporting and sustainability auditing.

Course Objectives

Upon the successful completion of this course, each participant will be able to:-

- Apply and gain a good working knowledge on planning and budgeting for managers
- Define planning and strategy covering company strategy and department strategy
- Recognize balanced scorecard, department objective, other department's objectives and carryout department plans
- Identify the risk issues, master budget as well as historical and zero based methodology
- Employ budget committee, operating budget and forecasting techniques
- Carryout cash budgeting and identify constrained resources
- Demonstrate scheduling, capital budgeting, variance reporting, reporting and sustainability auditing

Exclusive Smart Training Kit - H-STK®



Participants of this course will receive the exclusive “Haward Smart Training Kit” (H-STK®). The H-STK® consists of a comprehensive set of technical content which includes **electronic version** of the course materials, sample video clips of the instructor’s actual lectures & practical sessions during the course conveniently saved in a **Tablet PC**.

Who Should Attend

This course provides an overview of all significant aspects and considerations of planning and budgeting for finance directors, finance controllers, senior management accountants, senior operational management, technical managers, engineering managers, planning managers, department managers and general managers.

Training Methodology

All our Courses are including **Hands-on Practical Sessions** using equipment, State-of-the-Art Simulators, Drawings, Case Studies, Videos and Exercises. The courses include the following training methodologies as a percentage of the total tuition hours:-

- 30% Lectures
- 20% Practical Workshops & Work Presentations
- 30% Hands-on Practical Exercises & Case Studies
- 20% Simulators (Hardware & Software) & Videos

Course Certificate(s)

- (1) Internationally recognized Competency Certificates and Plastic Wallet Cards Certificates will be issued to participants who completed a minimum of 80% of the total tuition hours and successfully passed the exam at the end of the course. Certificates are valid for 5 years.

Recertification is FOC for a Lifetime.

Sample of Certificates

The following are samples of the certificates that will be awarded to course participants: -



- (2) Official Transcript of Records will be provided to the successful delegates with the equivalent number of ANSI/IACET accredited Continuing Education Units (CEUs) earned during the course.

* Haward Technology * CEUs * Haward Technology * CEUs * Haward Technology * CEUs * Haward Technology *



Haward Technology Middle East
Continuing Professional Development (HTME-CPD)

CEU Official Transcript of Records



TOR Issuance Date: 16-Nov-21
HTME No. 8667-2014-9020-2559
Participant Name: Waleed Al Habeeb

Program Ref.	Program Title	Program Date	No. of Contact Hours	CEU's
TM0241	Planning & Budgeting for Managers	November 12-16, 2021	30	3.0

Total No. of CEU's Earned as of TOR Issuance Date **3.0**

TRUE COPY

Jaryl Castillo
 Academic Director

Haward Technology has been approved as an Authorized Provider by the International Association for Continuing Education and Training (IACET), 2201 Cooperative Way, Suite 600, Herndon, VA 20171, USA. In obtaining this approval, Haward Technology has demonstrated that it complies with the ANSI/IACET 1-2013 Standard which is widely recognized as the standard of good practice internationally. As a result of their Authorized Provider membership status, Haward Technology is authorized to offer IACET CEUs for programs that qualify under the ANSI/IACET 1-2013 Standard.

Haward Technology's courses meet the professional certification and continuing education requirements for participants seeking Continuing Education Units (CEUs) in accordance with the rules & regulations of the International Association for Continuing Education & Training (IACET). IACET is an international authority that evaluates programs according to strict, research-based criteria and guidelines. The CEU is an internationally accepted uniform unit of measurement in qualified courses of continuing education.

Haward Technology is accredited by




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Certificate Accreditations

Certificates are accredited by the following international accreditation organizations: -


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The International Accreditors for Continuing Education and Training (IACET - USA)

Haward Technology is an Authorized Training Provider by the International Accreditors for Continuing Education and Training (IACET), 2201 Cooperative Way, Suite 600, Herndon, VA 20171, USA. In obtaining this authority, Haward Technology has demonstrated that it complies with the **ANSI/IACET 2018-1 Standard** which is widely recognized as the standard of good practice internationally. As a result of our Authorized Provider membership status, Haward Technology is authorized to offer IACET CEUs for its programs that qualify under the **ANSI/IACET 2018-1 Standard**.

Haward Technology's courses meet the professional certification and continuing education requirements for participants seeking **Continuing Education Units (CEUs)** in accordance with the rules & regulations of the International Accreditors for Continuing Education & Training (IACET). IACET is an international authority that evaluates programs according to strict, research-based criteria and guidelines. The CEU is an internationally accepted uniform unit of measurement in qualified courses of continuing education.

Haward Technology Middle East will award **3.0 CEUs** (Continuing Education Units) or **30 PDHs** (Professional Development Hours) for participants who completed the total tuition hours of this program. One CEU is equivalent to ten Professional Development Hours (PDHs) or ten contact hours of the participation in and completion of Haward Technology programs. A permanent record of a participant's involvement and awarding of CEU will be maintained by Haward Technology. Haward Technology will provide a copy of the participant's CEU and PDH Transcript of Records upon request.

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British Accreditation Council (BAC)

Haward Technology is accredited by the **British Accreditation Council** for **Independent Further and Higher Education** as an **International Centre**. BAC is the British accrediting body responsible for setting standards within independent further and higher education sector in the UK and overseas. As a BAC-accredited international centre, Haward Technology meets all of the international higher education criteria and standards set by BAC.

Course Fee

US\$ 5,500 per Delegate + **VAT**. This rate includes H-STK® (Haward Smart Training Kit), buffet lunch, coffee/tea on arrival, morning & afternoon of each day.

Accommodation

Accommodation is not included in the course fees. However, any accommodation required can be arranged at the time of booking.

Course Instructor(s)

This course will be conducted by the following instructor(s). However, we have the right to change the course instructor(s) prior to the course date and inform participants accordingly:



Mr. Dimitry Rovas, CEng, MSc, PMI-PMP, SMRP-CMRP is a **Senior Management Consultant** with extensive industrial experience in **Oil, Gas, Power** and **Utilities** industries. His expertise includes **Leadership & Change Management, Talent Management, Presentation Skills, Negotiation Skills, Interpersonal Skills, Communication Skills, Collaboration Skills, Developing Effective Partnership, Developing & Managing Budget, Technical Design & Development, Analytical & Troubleshooting Techniques, Interpersonal Skills, Leadership & Mentoring, Time Management, Performance Management, Strategic Planning & Analysis and Communication & Reporting Skills, Project Management, Construction Management, Project Management Planning & Control Techniques, Project Risk Management, Quality Management, Project Acceleration Techniques, Scope Control Management, Contract Management, Asset Management, Procurement & Purchasing Management, Warehousing, Quality Management System (QMS) and Business Management.** Further, he is also well-versed in **Energy Conservation, Electricity Distribution Systems, Energy Saving, Combined Cycle Power Plant, Gas & Steam Turbines, Heat Transfer, Machine Design, Fluid Mechanics, Heating & Cooling Systems, Heat Insulation Systems and Heat Exchanger & Cooling Towers.** He was the **Project Manager** wherein he was managing, directing and controlling all activities and functions associated with the domestic heating/cooling facilities projects.

During his life career, Mr. Rovas has gained his practical and field experience through his various significant positions and dedication as the **EPC Project Manager, Field Engineer, Preventive Maintenance Engineer, Researcher, Instructor/Trainer, Telecom Consultant** and **Consultant** from various companies such as the Podaras Engineering Studies, Metka and Diadikasias, S.A., **Hellenic Petroleum Oil Refinery** and COSMOTE.

Mr. Rovas is a **Chartered Engineer** of the **Technical Chamber of Greece**. Further, he has **Master's** degree in **Mechanical Engineering** and **Energy Production & Management** from the **National Technical University of Athens**. Moreover, he is a **Certified Instructor/Trainer**, a **Certified Maintenance and Reliability Professional (CMRP)** from the Society of Maintenance & Reliability Professionals (SMRP), a **Certified Project Management Professional (PMP)**, a **Certified Internal Verifier/Assessor/Trainer** by the **Institute of Leadership & Management (ILM)** and a **Certified Six Sigma Black Belt**. He is an active member of Project Management Institute (PMI), Technical Chamber of Greece and Body of Certified Energy Auditors and has further delivered numerous trainings, seminars, courses, workshops and conferences internationally.

Course Program

The following program is planned for this course. However, the course instructor(s) may modify this program before or during the course for technical reasons with no prior notice to participants. Nevertheless, the course objectives will always be met:

Day 1: Sunday, 23rd of June 2024

0730 - 0800	<i>Registration & Coffee</i>
0800 - 0815	<i>Welcome & Introduction</i>
0815 - 0830	PRE-TEST
0830 - 0930	Introduction to Planning/Strategy
0930 - 0945	<i>Break</i>
0945 - 1100	Company Strategy
1100 - 1200	Department Strategy
1200 - 1215	<i>Break</i>
1215 - 1420	Balanced Scorecard
1420 - 1430	Recap
1430	<i>Lunch & End of Day One</i>

Day 2: Monday, 24th of June 2024

0730 - 0930	Department Objective
0930 - 0945	<i>Break</i>
0935 - 1100	Other Department' s Objectives
1100 - 1200	Department Plans
1200 - 1215	<i>Break</i>
1215 - 1420	Risk Issues
1420 - 1430	Recap
1430	<i>Lunch & End of Day Two</i>

Day 3: Tuesday, 25th of June 2024

0730 - 0830	Master Budget
0830 - 0930	Historical
0930 - 0945	<i>Break</i>
0945 - 1100	Zero Based
1100 - 1200	Methodology
1200 - 1215	<i>Break</i>
1215 - 1420	Budget Committee
1420 - 1430	Recap
1430	<i>Lunch & End of Day Three</i>

Day 4: Wednesday, 26th of June 2024

0730 - 0930	Operating Budget
0930 - 0945	<i>Break</i>
0945 - 1100	Forecasting Techniques
1100 - 1200	Cash Budgeting
1200 - 1215	<i>Break</i>
1215 - 1420	Constrained Resources
1420 - 1430	Recap
1430	<i>Lunch & End of Day Four</i>

Day 5: Thursday, 27th of June 2024

0730 – 0930	<i>Scheduling</i>
0930 – 0945	<i>Break</i>
0945 – 1100	<i>Capital Budgeting</i>
1100 – 1200	<i>Variance Reporting</i>
1200 – 1215	<i>Break</i>
1215 – 1300	<i>Reporting & Sustainability Auditing</i>
1300 – 1315	<i>Course Conclusion</i>
1315 – 1415	COMPETENCY EXAM
1415 – 1430	<i>Presentation of Course Certificates</i>
1430	<i>End of Course</i>

Practical Sessions

This practical and highly-interactive course includes real-life case studies and exercises:-



Course Coordinator

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