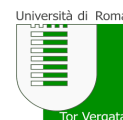


Extra Activity
"Planning, Budgeting & Forecasting 101"

September / December 2018 - 6 CFU
[Stefano Lombardi](#) - Senior Manager



One of the natural job opportunities of the Business Administration and Economics graduated students are the large Companies, and in particular the Departments of Administration, Finance and Control. A key area of this department is Planning and Control, whose main targets are:

- To manage, industrial planning, budgeting, forecasting and reporting processes and the deployment of the Company Control Model,
- To monitor the Financial and Operating results and related KPIs, highlighting gaps and suggesting corrective actions;
- To perform economic and financial evaluation for investments;

The aim of this course, which includes a Business Challenge, is to bring students closer to the real working life within the Planning and Control departments. Key topics:

- Introduction to Planning and Control and overview of the main Planning, Budgeting & Forecasting processes
- Main Planning methodologies and real-life examples
- Company Control Model and the Profit & Loss
- Effective presentation and storytelling

Whitin the Business Challenge the students, working in teams, will have to:

- Hypothesize a Planning Model of a company Profit & Loss
- Present, as a team, the Planning Model during the Final Exam

Module	Activity	Where	Title	Description	Hours	Day	Hour	Classroom	Notes
Module 1: Planning, Budgeting & Forecasting	Lesson 1	In Classroom	Introduction to the Course and to Planning, Budgeting & Forecasting	- Introduction to the course with modules description, expectations, deliverables, course passing criteria etc. - What is Planning, Budgeting & Forecasting?	3	Friday Sep 28th	14.00	P12	
	Lesson 2	In Classroom	The Planning & Control department role in the Organizations	- P&C role in the Organizations - P&C Processes - The company Control Model	3	Friday Oct 5th	14.00	P12	
	Lesson 3	In Classroom	The Profit & Loss and the Budgeting typical approaches. Business Challenge start-up	- The Profit & Loss - Zero base budgeting, driver based budgeting, etc. - Business challenge Start-Up, and Excel Planning Model expectations	3	Friday Oct 12th	14.00	P12	
Module 2: Business Game - Real life approach to Planning, Budgeting & Forecasting	Group Activity 1	Business Challenge / Self Study	Excel Planning Model Preparation (Business Challenge)	- Students work in teams to create an Excel Profit & Loss Planning Model (i.e. which will be the Revenues and the Costs of a single Wind Turbine for the next 12 Months and 5 Years?)	11	Business Challenge / Self Study			
	Q&A Time Team 1	Skype	Q&A Time	Q&A Time: each team can interact with questions in order to solve any doubt about the Business Challenge	1	Oct 16th	9.30	Skype	Can be modified according to lecturer's and team's needs
	Q&A Time Team 2	Skype				Oct 16th	10.30	Skype	
	Q&A Time Team 3	Skype				Oct 17th	9.30	Skype	
	Q&A Time Team 4	Skype				Oct 17th	10.30	Skype	
	Q&A Time Team 5	Skype				Oct 17th	14.00	Skype	
	Lesson 4	In Classroom	Effective Presentations and Storytelling	- Effective Presentations and Storytelling	2	Friday Oct 19th	14.00	P12	
Group Activity 2	Business Challenge / Self Study	Power Point Planning Model Preparation (Business Challenge)	- Students work in teams (max 6 per team) to create a Power Point presentation to be shared during the Final Exam	12	Business Challenge / Self Study				
Final Exam	Final Exam Team 1	In Classroom	Final Exam	Final Exam, by team. Each Team, presents: - Presentation of the work done (e.g Power Point, Prezi, Paper, etc.); - Excel Planning Model; and, as a Team, replies to some Questions about Planning, Budgeting & Forecasting	1	Friday Nov 9th	09:30	P12	Can be modified according to lecturer's and team's needs
	Final Exam Team 2	In Classroom					10:30		
	Final Exam Team 3	In Classroom					11:30		
	Final Exam Team 4	In Classroom					12:30		
	Final Exam Team 5	In Classroom					14:30		