



CPA

CHARTERED
PROFESSIONAL
ACCOUNTANTS
BRITISH COLUMBIA

CPABC EXECUTIVE PROGRAMS

Moving you forward



Executive Programs

Navigating the complex environment in which you conduct business can be challenging; we're here to help you rise to that challenge.

CPABC Executive Programs are multi-day, interactive, in-residence programs. The format is conducive to achieving greater depth in your learning - experienced facilitators will guide you through the learning curriculum, and you will reflect on learning outcomes to develop actionable plans for yourself and your organization.

You will also benefit from peer sharing and building a professional network. To optimize your experience, each offering has a limited class size.

Invest in your and your organization's future; sign up for the CPABC Executive Programs to move forward and drive better performance in your organization.

EMAIL pdreg@bccpa.ca
WEB pd.bccpa.ca/pd-in-depth
TEL 604 872.7222

Our Executive Programs often sell out quickly. Spaces are allocated on a first-come, first-served basis, and registering by the early-bird deadline does not necessarily guarantee a seat in the program of your choice. We endeavour to schedule additional offerings to meet demand when possible, but encourage you to register early to avoid disappointment.

Controller's Operational Skills Program

"A solid foundation of leadership & management theory that I will build on for the foreseeable future."

"Very useful program - helped me to understand better how my organization is structured and why, and identify areas/opportunities for improvement."

"I feel inspired to go back to work and take the role to the next level."

Controller's Management Program

"Awesome. This has helped me develop a plan to bring my team together and help my peer managers."

"Made me realize the vast potential within me to lead."

"I feel rejuvenated, empowered and love that I will be able to pass along my takeaways to others in my organization - up, down and across the line."

CFO's Operational Skills Program

"Excellent course to improve core competencies for any CFO or Finance Executive, and a great chance to interact in a wonderful setting."

"Excellent presenter, clearly knowledgeable and with relevant business experience. Worthwhile investment of time and money."

"This program was very comprehensive, adding new perspective plus amending known requirements of my role. It will add value to what I bring to the table with my organization."

CFO's Leadership Program

"Loved it! Great ideas, readily applicable and encompassing personal as well as corporate life."

"Impressed. Excellent information."

"Excellent program. Matching coach's advice with in-class learning provided me with concrete solutions to enduring problems."

CFO as Navigator

"This course is such a wealth of knowledge. Illustrates just how much information is out there. Guides you to a point where you can dive in and get immersed."

"This is an excellent course for those new to the CFO position but is also a mechanism for experienced CFOs to assess whether they are paying attention to the right things."

Discover how you can move yourself and your organization forward

Our Current Programs

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|---|--|---|---|--|---|
| <p>CONTROLLER'S PROGRAM</p> <p>Created with the aspiring and new Controller in mind.</p> | <p>CFO'S PROGRAM</p> <p>Geared towards aspiring and new CFOs.</p> | <p>CFO AS NAVIGATOR PROGRAM</p> <p>Geared towards seasoned financial executives.</p> | <p>ENTERPRISE RISK MGMT FUNDAMENTALS</p> <p>Geared towards financial professionals seeking knowledge in the area.</p> | <p>THE OPTIMAL NEGOTIATOR</p> <p>Geared towards professionals seeking negotiation mastery</p> | <p>THE CEO PROGRAM</p> <p>Geared towards current and aspiring leaders.</p> |
| <p>The Controller's Operational Skills Program focuses on the core technical processes and procedures of the financial role.</p> | <p>The CFO's Operational Skills Program focuses on the strategic technical competencies of the role.</p> | <p>The CFO as Navigator Program is a stand-alone advanced program for more seasoned financial executives; it builds upon the foundational skills and concepts that add value and enhance the role within the organization.</p> | <p>The Enterprise Risk Management Program is a stand-alone program for financial professionals of any level who are seeking to learn fundamentals and best practices specifically in the area of enterprise risk management.</p> | <p>The Optimal Negotiator is a stand-alone program for professionals of any level who are seeking to obtain greater comfort and confidence in their resolve to get others to agree with them, or who aspire to mastery in the art of negotiation.</p> | <p>The CEO Program is a practical and provocative stand-alone advanced program for current and aspiring leaders seeking to excel in the upper echelons of executive responsibility</p> |
| <p>The Controller's Management Program focuses on honing your personal and interpersonal effectiveness.</p> | <p>The CFO's Leadership Program focuses on developing the skills of an influential leader in your organization.</p> | | | | |
| <p>Pages 8-11</p> | <p>Pages 12-15</p> | <p>Pages 16-17</p> | <p>Pages 18-19</p> | <p>Pages 20-21</p> | <p>Pages 22-23</p> |

CPABC PD Executive Program Faculty

We are very fortunate to retain the very best faculty to facilitate our Executive Programs. All of our faculty members are experienced educators with years of practical experience in business, management and leadership.



DR. VIJAY JOG is the Founder-President of Corporate Renaissance Group, a firm dedicated to driving better business management and performance. He has led CRG's growth in areas of corporate dashboards, business intelligence, bridging the gap between technology, HR and finance, designing incentive systems and conceptualizing and creating innovative software applications that are used by thousands of organizations around the world.

Vijay has been a consultant to over 100 enterprises, mid to large, not only in Canada but also in the U.S., Europe, South Africa, and the Caribbean, accumulating global experience in the process. He is also the Chancellor Professor of Finance at the Sprott School of Business, Carleton University and has many awards and recognition for his research and teaching.

**Vijay facilitates:
The CFO as Navigator Program**



LINDA LUCAS, CPA, CMA is Chief Executive Officer at Roper Greyell LLP, Employment + Labour Lawyers. As CEO, Linda is responsible for driving the firm's vision and long-term strategy with an emphasis on client collaboration. Under her guidance, Roper Greyell is driving change in the legal industry by moving away from a traditional service-based legal business model to one that sees clients as partners and proactively puts their businesses first.

Linda has over 20 years of experience in all aspects of finance and operations. She obtained her CPA, CMA designation in 2000 and has since worked in many different industries across Canada, United Kingdom, Cayman Islands and the Bahamas. Her experience prior to joining Roper Greyell includes working with organizations experiencing significant growth, multiple locations and services, and diverse client bases.

**Linda co-facilitates:
The Controller's Management Program**



MIA MAKI, BA, MBA, FCPA, FCMA, is a Principal of a consulting firm and a Professor with the University of Victoria Gustavson School of Business, with over 20 years of teaching experience. She has worked in Finance and Accounting since 1986 and has experience in a wide variety of industries, including audio technology, airlines and aviation, not-for-profit, public accounting, marine transportation, fisheries monitoring, gaming and other technology arenas.

She has worked for both private and public companies, has participated in raising over \$50M in funds, and has experience in international initiatives including acquisitions (United States), strategic partnerships (Japan) and joint subsidiary creation (Europe).

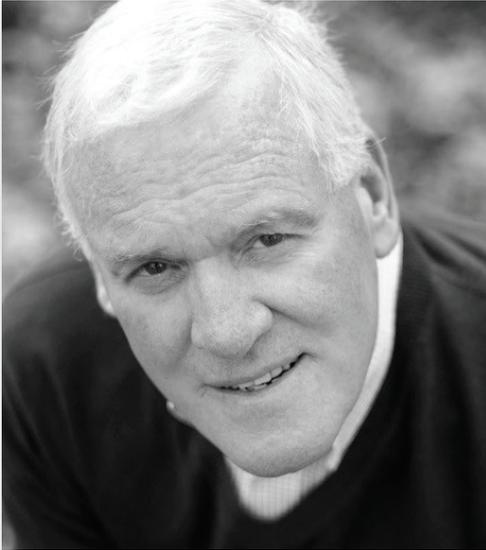
Mia facilitates:
The Controller's Operational Skills Program



LESLEY-ANN MARRIOTT, CEC, PCC, is a Certified Executive Coach who holds the advanced credential of Professional Certified Coach. A former executive in the food industry, Lesley-Ann has over 25 years of leadership and management experience. She has facilitated hundreds of corporate partnerships at the most senior levels of the world's largest food companies - Coca-Cola, Procter & Gamble, and Nestle. Contracts in excess of \$50 million and managing sales of over \$2.5 billion were negotiated based on dynamic, collaborative partnerships.

Today, Lesley-Ann's clients include a roster of Executive Directors, Board leaders, Vice Presidents, CEO/CFOs and business owners. She is Associate Faculty at Royal Roads University, Victoria, BC for the Graduate level Executive Coaching program.

Lesley-Ann co-facilitates:
The Controller's Management Program
The CFO's Leadership Program



DR. JIM MURRAY, Hon BA, MA, MSc, EdD, is CEO of optimal solutions international, a firm dedicated to helping people and organizations achieve their full potential.

Jim has created and taught courses for CPABC since 1982. He holds four degrees, is the architect of several advanced executive development programs for four provincial CPA bodies, has published three best-selling books and provided strategic counsel to over 600 organizations. He has been nationally honoured by the university community and his courses formally recognized for “excellence in innovation and design”.

Jim facilitates:
The Optimal Negotiator
The CEO Program



JEFFREY D. SHERMAN, MBA, CIM, FCPA, FCA (Ontario), is Chief Financial Officer of Atrium Mortgage Investment Corporation (TSX: AI), director of several companies, and has over 20 years experience as a corporate director and executive in high tech, biotechnology/medical, financial services, and business services.

Jeffrey is a popular presenter, and was an adjunct professor at York University for fifteen years. He is a frequent course director and course author for many organizations including provincial bodies of chartered professional accountants across Canada, and the Law Society of Upper Canada, and has written over twenty books including Cash Management Toolkit for Small and Medium Businesses (published by CPA Canada).

Jeffrey facilitates:
The CFO's Operational Skills Program



TAMMY TOWILL, MBA, FCPA, FCMA is a partner in the Cordura Group providing business and financial advisory services and related education and training programs to communities and organizations seeking growth or change. For over 20 years, Tammy has worked with private and public sector companies throughout North America and Europe, providing education, training and facilitating in the areas of leadership, strategy, business planning and curriculum development and implementation.

She has served on and worked with several boards in Canada and the U.S., including the Society of Certified Management Accountants of BC (Chair 2013/14) and the BC Chapter of the American Marketing Association (President 2000/2001).

**Tammy co-facilitates:
The CFO's Management Program**



WILLIAM (BILL) WESIOLY, CPA, CMA (Ontario), is an independent Risk Management consultant and professional Leadership coach. He is an enthusiastic and accomplished leader whose goal is to enrich the effectiveness of people and organizations, with both skill and heart. Prior to becoming an independent consultant, he worked in the financial services industry holding leadership roles of increasing responsibility, first with BMO and then with RBC. His main area of focus was in the field of Risk Management where he successfully built and led risk management programs such as Risk and Control Assessments and Operational Risk Scenarios.

Bill has developed, and currently teaches a number of Risk Management courses including CPA Ontario's Enterprise Risk Management Certification Program, and the Centre of Outsourcing Research and Education's (CORE) Risk Management in Outsourcing course. He is currently a member of the Professional Risk Managers International Association (PRIMA).

**Bill facilitates:
Enterprise Risk Management Program**

The Controller's Operational Skills Program

OBJECTIVE

As a Controller, you are expected to be the financial expert in your organization. You are relied upon to produce, analyze and interpret the financial data that will be used by the executive team to make key financial decisions. To excel, you must continuously demonstrate leading edge knowledge and keen business acumen.

The Controller's Operational Skills Program is designed to enhance your role on the management team by sharpening your skills in risk management and controls, ethical leadership, planning, budgeting and forecasting, performance measurement approaches and financial reporting.

You will explore ways to maximize the effectiveness of your accounting department through staffing and structure, policies and procedures, and process and quality management. You will gain insights into performance enablers for success, with a focus on information management and human resources management, and an eye towards trends in Controllershship.

WHO SHOULD ATTEND

Are you responsible for management and financial reporting? Do you want to build upon your operational skills and knowledge of Controllershship? Do you want to gain more confidence and be more effective in your role? If you answered "yes", and if you are either an aspiring Controller or an existing Controller, then this is the program for you.

THE PROGRAM

This is an in-residence program, and participants are encouraged to stay on-site. The program cost includes course materials and some meals. The accommodation costs are separate, and will be paid directly to the hotel.

CPABC will not be holding any accommodation blocks at the hotel for offerings held in Vancouver. We have negotiated corporate rates at some of the hotels in downtown Vancouver - those who require accommodation will need to make their own arrangements.

For offerings held outside Vancouver, CPABC has negotiated special conference rates with the program facilities. We will contact you to confirm your arrival and departure dates closer to the program dates, and will book those dates for you. Attendees will pay for their accommodation fees directly to the hotel upon checkout.

FACULTY

Mia Maki, BA, MBA, FCPA, FCMA

2019 DATES

May 12-15

Westin Whistler Resort, Whistler

July 10-13

Four Seasons Hotel, Vancouver

September 22-25

Westin Whistler Resort, Whistler

November 13-16

Victoria Marriott Inner Harbour, Victoria

PRICING

Regular \$3,150 + GST

Early bird discount of \$300 off the regular price will apply if registration is completed at least 2 months prior to start date.

CPD: 25 Hours

Ethics Content: 4 hours

The Controller's Operational Skills Program

Curriculum

CPABC CONTROLLERSHIP PROGRAM CERTIFICATE

The CPABC Controllership Program Certificate is a two-component program designed to provide you with the foundation for success.

The Controller's Operational Skills Program will focus on core technical and operational skills, while The Controller's Management Program will focus on management soft skills,

You can choose to complete only one of these programs, but if you complete both components you will receive the CPABC Controllership Program Certificate.

Note that these programs can be completed in any order as they focus on separate and distinct skills.

The Controller's Role

- A framework for effective Controllership
- Risk identification, management and controls
- Planning, budgeting and forecasting
- Performance monitoring and reporting
- Financial standards and statutory reporting

Running an Effective Accounting Department

- Organizing an effective accounting team (including people and process)
- Purchasing and payables
- Credit, billing and collections
- Inventory planning and management
- Cash planning and management

Performance Enablers and the Way Forward

- Brief introduction to managing change
- Information technology - today and tomorrow
- Controller's role in HR management
- Emerging issues and trends
- Personal life skills, action planning and closing

Approximately half of the total program time is allocated to group activity and discussion to build a high level of engagement, sharing of participants' ideas and general networking.



The Controller's Management Program

OBJECTIVE

As a Controller, you not only provide financial expertise in your organization, you provide leadership as a key member of the management team. Building on the foundation of your technical skills, your management and leadership skills will take you and your organization to the next level.

The Controller's Management Program is designed to provide you with the theory, best practices, tools and skills to further sharpen your leadership and management skills.

The program concentrates on four key leadership areas:

1. Self-awareness and self-management
2. Organizational perspective and influence
3. Managing and leading others
4. Effective communication for a variety of contexts

This highly interactive program will provide you with a unique experience and opportunities for you to network and learn from your peers. Through case studies, group discussions, exercises and role-plays representative of situations faced by controllers and financial managers, you will gain skills and confidence to increase both your personal and interpersonal effectiveness.

Over the course of three-plus days you will gain critical insights into leading practices in management and leadership and have the opportunity to apply tools and skills to your work context, share experiences with your peers and take away actionable goals.

WHO SHOULD ATTEND

This course is for you if you are

- Relatively new to a Controller or Financial Manager role
- Aiming to move up to the Controller role from another position
- Preparing to shift from a staff position or public practice into an industry management role
- Looking to sharpen your interpersonal and management skills

THE PROGRAM

This is an in-residence program, and participants are encouraged to stay on-site. The program cost includes course materials and some meals. The accommodation costs are separate, and will be paid directly to the hotel.

CPABC has negotiated special conference rates with the program facilities. We will make the accommodation arrangement on your behalf - we will contact you to confirm your arrival and departure dates closer to the program dates, and will book those dates for you. Attendees will pay for their accommodation fees directly to the hotel upon checkout.

FACULTY

Linda Lucas, CPA, CMA
Lesley-Ann Marriott, CEC, PCC

2019 DATES

May 8-11
Westin Whistler Resort, Whistler

September 18-21
Westin Whistler Resort, Whistler

PRICING

Regular \$3,150 + GST

Early bird discount of \$300 off the regular price will apply if registration is completed at least 2 months prior to start date.

CPD: 29 Hours

Special Program Features

- Leadership assessments will be completed as pre-work to help frame your role and who you are
- One-on-one session with professional Executive Coach provided on-site

The Controller's Management Program

Curriculum

CPABC CONTROLLERSHIP PROGRAM CERTIFICATE

The CPABC Controllership Program Certificate is a two-component program designed to provide you with the foundation for success.

The Controller's Management Program will focus on management soft skills, while The Controller's Operational Skills Program will focus on core technical and operational skills.

You can choose to complete only one of these programs, but if you complete both components you will receive the CPABC Controllership Program Certificate.

Note that these programs can be completed in any order as they focus on separate and distinct skills.

Controller as Leader

- Increase self-awareness and understanding of your leadership style
- Understand linkages between leadership and self-management
- Know what motivates you when things are going well and when things are not going well
- Understand different personality profiles and learn how to build productive work relationships
- Learn how to adapt your approach and leadership to your organization and team

Supervisory Skills

- Learn how to provide effective and timely feedback
- Understand how to align your staff with organizational goals
- Build your listening and emotional intelligence skills
- Become aware of unconscious bias and its impact on behaviour
- Learn core coaching skills for managing performance

Team Dynamics

- Know how to create effective teams
- Learn how to conduct effective meetings
- Understand how organizational culture shapes team dynamics

Presentation & Communication Skills

- Know how to adapt your message and delivery for specific audiences and situations
- Appreciate the importance of non-verbal communication
- Develop effective presentations
- Practice presentation skills
- Learn how to communicate assertively
- Become more comfortable with difficult conversations

Conflict & Change Management

- Learn how to identify the root causes of conflict
- Understand conflict behaviours in yourself and others, and ways they shape responses to conflict
- Know how to use conflict to build relationships
- Learn different ways to respond to conflict and how to choose your approach for a variety of situations
- Appreciate why change can be a source of conflict and how to overcome resistance to change



The CFO's Operational Skills Program

OBJECTIVE

Reporting to the CEO or President, the Chief Financial Officer is the top job that leads, initiates, and manages the financial decision-making process within the organization. In addition to being a senior advisor to the CEO and the Board, the CFO has other roles: business partner, scorekeeper, commentator, expert and custodian.

These multiple functions mean that the CFO has to see both the forest and the trees, needs to understand the business and its numbers, as well as lead, develop and help execute the business strategy.

This program delivers core CFO operational competencies that organizations expect and demand. Examine the relationship of strategy and risk-taking and help drive your organization's mission and success.

Nail down the strategy, planning, budgeting and internal control competencies to facilitate efficient and effective operations. Learn how to effectively communicate metrics and operating results for internal and external stakeholders.

The residential format with group workshops lets you readily network and learn from your peers.

WHO SHOULD ATTEND

Do you currently direct, or wish to direct the finance and administration areas of your organization? Do the CEO and the Board look to you for counsel and guidance? Are you trying to improve governance, accountability and the control environment? Would you like to examine the state-of-the-art developments in strategy, risk management and financial reporting? If so, then this program was created with you in mind.

THE PROGRAM

This is an in-residence program, and participants are encouraged to stay on-site. The program cost includes course materials and some meals. The accommodation costs are separate, and will be paid directly to the hotel.

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FACULTY

Jeffrey D. Sherman, MBA, CIM, FCPA, FCA (Ontario)

2019 DATES

June 9-12

Four Seasons Hotel, Vancouver

October 20-23

Westin Whistler Resort, Whistler

PRICING

Regular \$3,250 + GST

Early bird discount of \$300 off the regular price will apply if registration is completed at least 2 months prior to start date.

CPD: 28 Hours

Ethics Content: 4 hours

Curriculum

CPABC CFO PROGRAM CERTIFICATE

The CPABC CFO Program Certificate is a two-component program designed to provide you with the foundation for success.

The CFO's Leadership Program will focus on management and leadership skills, while The CFO's Operational Skills Program will focus on core technical and operational skills.

You can choose to complete only one of these programs, but if you complete both components you will receive the CPABC CFO Program Certificate of Completion.

Note that these programs can be completed in any order as they focus on separate and distinct skills.

Governance, Strategy and Risk Management

- Stakeholders, shareholders and the board
- Culture, tone and ethics
- Role of the CFO
- Behavioural finance
- Integrating governance and strategy
- COSO's Enterprise Risk Management – Integrated Framework

Creating Value Through Financial Management

- Managing in the age of disruption
- Operational and financial tools
- Internal control and COSO's Internal Control – Integrated Framework
- Treasury, capital markets and financial instruments
- Cash management and optimizing expenses
- Reporting and communicating results
- Gaps in GAAP

Corporate Finance

- Innovative ideas for challenging times
- Mergers and acquisitions: due diligence and valuing a business
- Optimal capital structure
- How to finance growth

Participants will receive a copy of Canadian Treasury Management, written by the program author and instructor, Jeffrey Sherman.



The CFO's Leadership Program

OBJECTIVE

The role of the Chief Financial Officer continues to evolve. Beyond technical expertise, today's CFOs need to make strategic financial decisions in a changing dynamic environment. This necessitates inspired, authentic leaders capable of solving challenging problems as a valued member of the C-suite. From supporting strategic decision making through to strong financial stewardship, there is a need for the CFO to demonstrate expertise in a broad range of areas, including regulation, globalisation, technology, risk, transformation, stakeholder management, reporting, and talent management. In short, they need to be truly effective leaders.

The CFO's Leadership Program is an intensive and interactive program that blends best practices, case studies, group discussions and role-play to allow participants to advance their leadership skills to move from the technical aspects of being a finance professional, to being a strategic partner. This program concentrates on areas where CFOs have told us they feel they need the most help

- Leveraging strategy to get results
- Communicating and persuading others
- Leading & influencing across all stakeholders
- Leading culture and change

Over the course of three plus days you will gain critical insights into leading practices in management and leadership, and have the opportunity to apply tools and skills to your work context, share experiences with your peers and take away actionable goals.

WHO SHOULD ATTEND

This course is for you if you

- Direct, or wish to direct the finance and administration areas of your organization.
- Provide, or are seeking to position yourself as counsel to the CEO and the Board.
- Wish to expand your knowledge and develop your leadership skills as they apply to strategy execution and talent management in the finance and administration area.
- Want a unique opportunity to go beyond focusing on what you are doing as a leader to truly understand how you are being a leader.

THE PROGRAM

This is an in-residence program, and participants are encouraged to stay on-site. The program cost includes course materials and some meals. The accommodation costs are separate, and will be paid directly to the hotel.

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FACULTY

Tammy Towill, MBA, FCPA, FCMA
Lesley-Ann Marriott, CEC, PCC

2019 DATES

June 12-15

Four Seasons Hotel, Vancouver

October 16-19

Westin Whistler Resort, Whistler

PRICING

Regular \$3,250 + GST

Early bird discount of \$300 off the regular price will apply if registration is completed at least 2 months prior to start date.

CPD: 28 Hours

Special Program Features

- Leadership assessments will be completed as pre-work to help frame your role and who you are
- One-on-one session with professional Executive Coach provided on-site

Curriculum

CPABC CFO PROGRAM CERTIFICATE

The CPABC CFO Program Certificate is a two-component program designed to provide you with the foundation for success.

The CFO's Leadership Program will focus on management and leadership skills, while The CFO's Operational Skills Program will focus on core technical and operational skills.

You can choose to complete only one of these programs, but if you complete both components you will receive the CPABC CFO Program Certificate.

Note that these programs can be completed in any order as they focus on separate and distinct skills.

How to be a Strategist

- Learn how to shift from the operational phase to the strategic phase to tap into the different perspectives of all stakeholders to influence desired results
- Learn how to help your team execute better by being a better strategist
- Explore the gap between corporate strategic goals and the day to day operations in rapidly changing environments
- Understand how the role of the CFO impacts the development and sustainability of a positive corporate culture
- Discuss tools and techniques for how to drive change

Communicating and the Art of Persuasion

- Learn how to convey complex financial results and business performance to drive actionable outcomes through powerful presentations
- Receive feedback on a live presentation that will enhance your specific style
- Learn the latest techniques for powerful presentations
- Understand how to frame the organization both internally and externally
- Explore impacts on communication from core drivers such as globalization, technology, and multi-generational workforces

Leading & Influencing

- Learn how to develop a more effective leadership style to help lead your organization through globalization and growth
- Learn how to give & receive effective feedback
- Learn how to plan for your own succession
- Understand and explore when pay for performance is the right tool to drive performance and when it can impede desired results

Best Practices on Creating and Sustaining Resilient Leadership

- Learn tips about how effective executives manage their personal well-being
- Explore the best practices for managing daily tasks interactions and relationships
- Learn how to build 'executive presence' to be yourself while inspiring others
- Learn how to position yourself to have the greatest strategic impact both currently and in the future with the senior leadership team, other key stakeholders in the organization and with the Board

Negotiations

- Learn how to enhance your ability to negotiate and build consensus at the C-level
- Understand your negotiation style and its impact
- Explore various approaches to negotiations for success in today's business environment
- Review techniques and tools for internal and external negotiations

The CFO as Navigator Program

OBJECTIVE

The 21st century CFO is hearing the new calling from the corporate boardroom - “step out and go beyond the box”. Long gone are the days when the CFO was primarily focused on the traditional box of command and control, financial and management reporting.

The CFO as Navigator Program is designed to provide you with a highly applied and interactive experience, and will cover areas such as: value creating growth, value metrics, best in class management reporting platform, enterprise dashboards, performance metrics and strategy maps, information management and business intelligence, corporate planning platform design and creation, talent management and incentive design. This program is designed to make you a complete CFO.

Over the course of three-plus highly interactive and hands on days with cases and real life examples, you will develop, refine and gain insights into many interrelated areas.

WHO SHOULD ATTEND

Do you feel that a broader knowledge base may augment your considerable finance/accounting knowledge? Are you interested in learning about new tools and methods to add value to your enterprise? Do you want to go beyond the stovepipe finance function? Do you have a desire to do more and be a complete CFO and lead a best in class finance function? If so, then this program is for you.

This program is geared particularly towards those CFOs/Controllers in midmarket companies who are at the zenith of their career and are ready for the next challenge in their career.

THE PROGRAM

This is an in-residence program, and participants are encouraged to stay on-site. The program cost includes course materials and some meals. The accommodation costs are separate, and will be paid directly to the hotel.

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FACULTY

Dr. Vijay Jog

2019 DATES

July 17-20

Four Seasons Hotel, Vancouver

October 23-26

Westin Whistler Resort, Whistler

PRICING

Regular \$3,250 + GST

Early bird discount of \$300 off the regular price will apply if registration is completed at least 2 months prior to start date.

CPD: 26 Hours

The CFO as Navigator

Curriculum

CPABC CFO AS NAVIGATOR CERTIFICATE

The CFO as Navigator Program is a stand-alone program, and attendees will receive a certificate upon completion.

The program will be of greater benefit to more seasoned financial executives, including CFOs and Controllers, and will focus on concepts that add value and growth to the position and organization.

Dealing with the Volatile World

- The volatile world - new rules of the game
- The enterprise model and the finance function
- Expectations from CFO - partnering with business
- Adding value to the CxO table

Value Creation - Measurement and Management

- Defining value
- Quest for a universal metric
- Role of opportunity cost
- Value based management and value drivers

Business Models and Designing Breakthrough Strategies

- Business models - enterprise on a paper napkin
- Designing breakthrough strategies that work
- Vision, mission, core values - do these matter?

Building Enterprise Performance Dashboards and Incentive Platform

- Monitoring strategy execution
- Design and role of strategy maps
- Designing and using enterprise dashboards
- Leading and lagging indicators
- Designing incentives that work

The Elusive Business Intelligence - Getting Out of Excel Hell

- Information technology (IT) versus information management (IM)
- What is business intelligence?
- The user driven BI versus IT driven BI - what you must know
- How to successfully and cost effectively build a BI platform?
- The tech speak - middleware, ETL and data warehouse
- Best practices in BI implementation

Understanding the CIO/CTO and Tech-speak

- The role of technology - the world of techno-speak
- What are these SQL/DB2/ORACLE platforms?
- How to value CIO function - IT versus IS versus IM

Managing Human Capital and Talent

- Enterprise as a symphony
- Value added HR - identify the capability gaps
- Science into talent management and succession planning



Enterprise Risk Management Fundamentals Program

OBJECTIVE

In our increasingly complex environment, it is critical that Finance professionals understand and embrace Risk Management as a key discipline. This three-day, seven module program has been designed to help Finance leaders prepare for, and quickly react to evolving business threats and opportunities. By understanding and properly managing risk, businesses can thrive, create value and achieve a competitive advantage.

Learning outcomes participants can expect:

- Understand how Enterprise Risk Management enhances Corporate Governance and aligns with business strategy and corporate culture.
- Develop the ability to identify and assess the various risks that may have a critical impact on business, and choose the optimal risk mitigation strategies.
- Develop successful strategies for reporting on risks for Senior Management and Boards.
- Learn and properly apply key Risk Management tools, including Risk and Control Assessments and Key.
- Risk Indicators.

This highly interactive and hands-on learning program will include instructor led discussions, group discussions and case studies, all supported by a current and comprehensive resource materials package.

WHO SHOULD ATTEND

The program will be of great benefit to financial professionals with a few years of experience, who want to learn the fundamentals and best practices of risk management in order to either further their career, or add value to their organization. It is especially valuable for those financial professionals in organizations and industries where Risk Management is gaining critical importance.

THE PROGRAM

This is an in-residence program, and participants are encouraged to stay on-site. The program cost includes course materials and some meals. The accommodation costs are separate, and will be paid directly to the hotel.

CPABC has negotiated special conference rates with the program facilities. We will contact you to confirm your arrival and departure dates closer to the program dates, and will book those dates for you. Attendees will pay for their accommodation fees directly to the hotel upon checkout.

FACULTY

Bill Wesioly, CPA, CMA

2019 DATES

July 21-24

Hilton Whistler Resort, Whistler

PRICING

Regular \$3,150 + GST

Early bird discount of \$300 off the regular price will apply if registration is completed at least 2 months prior to start date.

CPD: 23 Hours

Curriculum

CPABC ENTERPRISE RISK MANAGEMENT FUNDAMENTALS CERTIFICATE

The Enterprise Risk Management Fundamentals Program is a stand-alone program, and attendees will receive a certificate upon completion.

The program will be of greater benefit to financial professionals with a few years of experience, who want to learn the fundamentals of risk management in order to either further their career, or add value to their organization.

Introduction to Enterprise Risk Management

- Definitions - Risk and Enterprise Risk Management (ERM)
- ERM and Corporate Governance
- ERM Frameworks and standards – ISO 31000
- The ERM “Wheel”

Establish Context for Managing Risk

- The Ethics of Risk Management
- Establishing the tone at the top
- Risk appetite and Risk tolerance
- Risk taxonomy
- Roles and responsibilities - The three lines of defence

Risk Identification and Risk Assessment

- Risk identification - What can happen? Where and when? Why and how?
- Approaches/techniques to identifying risk
- Risk assessment - inherent risk and residual risk
- Risk heat maps, Risk Registers and other Risk Management tools

Risk Treatment/Response

- Risk avoidance
- Risk acceptance/retention
- Risk mitigation – transfer and mitigation with controls
- Developing and implementing successful risk treatment/response plans

Risk Monitoring

- Areas of priority for monitoring
- Key risk indicators and Key performance indicators

Risk Reporting

- Who’s the audience? Various types of stakeholders for reporting
- Best practices in effectively communicating and reporting to Senior executives/Board

Going Forward

- Top risks of today
- Risk vs. Reward
- The keys to success in introducing and implementing an ERM program

The Optimal Negotiator: The Definitive Program for Serious Deal Makers

OBJECTIVE

Arguably, the one skill leaders must possess is the ability to get others to agree with them. In any undertaking of significance, knowing how to get people to say “yes” while seeing themselves as winners is crucial to your success and the prosperity of your organization. Indeed, you can’t ever expect to ascend the corporate ladder without a sound grasp of fundamental negotiating principles, their subtle nuances and the skills to match those who do it well.

This advanced, comprehensive, highly interactive program is the creation of Dr. Jim Murray who has been practising his time-honoured craft over the course of five decades. Tens of thousands of people from all professional callings have benefited from his street-savvy insights, expertise and hands-on experiences in virtually every conceivable negotiating arena.

This unique learning experience was designed for serious deal makers only – those who aspire to mastery. You will confront questions you’ve never even thought about before. If you can’t answer them, you’ll lose more often than you win. Although many understand the process intellectually, precious few are entirely comfortable in their ability to “optimize” deals. This program is offered in Canada once each year, has a limited enrollment and sells out early.

WHO SHOULD ATTEND

Negotiating is a delicate mix of art and science, style and substance. It prizes intuition as highly as intellect, common sense as much as hard numbers. It requires emotional detachment, an understanding of the critical process elements and a high aspiration level. It is a game of power, real as well as imagined. While some play the game masterfully, others only dimly understand it.

How do you (honestly) assess your capabilities? If you seek greater comfort and confidence in your resolve to get others to agree with you, or aspire to mastery, then this program was designed with YOU in mind.

THE PROGRAM

This is an in-residence program, and participants are encouraged to stay on-site. The program cost includes course materials and some meals. The accommodation costs are separate, and will be paid directly to the hotel.

CPABC will not be holding any accommodation blocks at the hotel for offerings held in Vancouver. We have negotiated corporate rates at some of the hotels in downtown Vancouver - those who require accommodation will need to make their own arrangements.

FACULTY

Dr. Jim Murray, Hon BA, MA, MSc, EdD

2019 DATES

November 18-20

Four Seasons Hotel, Vancouver

PRICING

Regular \$3,250 + GST

Early bird discount of \$300 off the regular price will apply if registration is completed at least 2 months prior to start date.

CPD: 28 Hours

The Optimal Negotiator: The Definitive Program for Serious Deal Makers

Curriculum

CPABC OPTIMAL NEGOTIATOR CERTIFICATE

The Optimal Negotiator is a stand-alone program, and attendees will receive a certificate upon completion.

This comprehensive program is designed for those who are serious about wanting to develop their skills beyond mere competence.

The following is a partial list of selected topics. The full curriculum is outlined on our website.

The Framework for Win-Win Outcomes

- Dissecting the Negotiating Jig-Saw Puzzle
- How to make losers feel like winners
- How to disguise and discover information

Tactic Recognition and Response

- Gradient stress: Getting others to agree
- Classic tactics, ploys and good counters
- Using Win/Lose tactics in a Win/Win way

Cross-cultural Differences in Negotiating

- Dissecting gender and ethnic styles
- Building strategic profiles for advantage
- Personality types & prototypical styles

The Process Simplified and Illustrated

- How to organize for optimal results
- Achieving instant alignment by design
- Overcoming resistance: Closing with magic

Critically Important Principles of Timing

- Dealing with 11th hour & deadlines
- Handling imposed time pressures
- When (and how) to convincingly say “no”

Power: Accumulating and Sustaining Leverage

- Fallacies, presence and influence
- How to diagnose the power of others
- When to increase and decrease your power

Using Human Behaviour to Advantage

- Negative and positive interaction cycles
- Functions of conflict & achieving self-control
- Engineering defensive & supportive climates

Becoming an Inventive Negotiator

- How to change the shape of any deal
- Dealing with salary negotiation phobias
- How to make seemingly impossible deals

Essential (and Powerful) Communication Skills

- Phrasing to induce the desired perceptions
- Deciphering the language of deception
- Understanding and using non-verbal cues

Working and Negotiating in Teams

- Planning and working as a team: A practicum
- Analysis of individual and team performance

Optimal Negotiator: The Fundamentals

- The things you should never do
- Attributes that define an optimal negotiator
- Achieving mastery – where to from here?

The CEO Program: Acquiring the Edge and Leading with Purpose

OBJECTIVE

This practical, one-of-a-kind program, offered for over a decade to an international audience of senior executives, is the creation of Dr. Jim Murray, who has led organizations in both public and private sectors and has a remarkable track record of advising leaders in over 600 enterprises. He counsels executives on how to handle complexity, uncertainty and transformative volatility. He understands why business models are failing and why management responses no longer deliver high performance. He specializes in liberating talent and motivating/retaining the brightest.

“CEO” is a misnomer. Leaders no longer execute, they decide ... then inspire others. They confront and unlock immense, unforeseen opportunities that arise from turbulent, often unexplainable forces. They realize yesterday’s solutions are insufficient and often counter-productive. They “go back to school” to acquire the necessary skills, insights and confidence to seize the white spaces of growth. They are in demand and they know it.

Leading with purpose requires the ability to build and apply strategic intelligence, prick the bubble of ignorance and anticipate career derailers, select talent and develop a cohesive executive team, respond courageously to unexpected high-impact surprises, devise workable strategies that inform and motivate action, and foster a culture of resilience to compete for the future.

WHO SHOULD ATTEND

This advanced program is designed for current and aspiring leaders who seek to excel with confidence and conviction in the upper echelons of executive responsibility. Do you possess the emotional and mental qualities, interpersonal skills, street-smart insights, decision-making competencies and executive presence to lead?

Beyond requisite skills, leadership means avoiding the allure of the slippery slope, knowing how to lead people who are brighter than you, designing a smart and a healthy organization, and deciding when “the game” must be retooled. Smart leaders have also resolved the life-altering questions that can determine one’s identity and thus one’s destiny.

THE PROGRAM

This is an in-residence program, and participants are encouraged to stay on-site. The program cost includes course materials and some meals. The accommodation costs are separate, and will be paid directly to the hotel.

CPABC has negotiated special conference rates with the program facilities. We will contact you to confirm your arrival and departure dates closer to the program dates, and will book those dates for you. Attendees will pay for their accommodation fees directly to the hotel upon checkout.

FACULTY

Dr. Jim Murray, Hon BA, MA, MSc, EdD

2019 DATES

September 16-19

Westin Whistler Resort, Whistler

PRICING

Regular \$3,250 + GST

Early bird discount of \$300 off the regular price will apply if registration is completed at least 2 months prior to start date.

CPD: 33 Hours

Curriculum

CPABC CEO CERTIFICATE

The CEO Program is a stand-alone program, and attendees will receive a certificate upon completion.

This advanced program is designed for current and aspiring leaders who seek to excel with confidence and conviction in the upper echelons of executive responsibility.

The following is a partial list of selected topics. The full curriculum is outlined on our website.

The Opportunities and Realities of CEOdom

- Why not you? The reasons CEOs get fired
- The difference between “good” and “best”
- Uncomfortable realities of being the top dog
- How to define your unique leadership identity

The Critical Challenges of Leadership

- What separates real leaders from pretenders
- Re-engineering organizational DNA
- Diagnosing enterprise health and savvy

The Essential Ingredients of Leadership

- Entrance Exam: questions you must answer
- Setting your compass: Non-negotiable rules
- Power, politics and intelligent self-promotion

Perfecting the Critical Skills

- What makes an effective executive team
- Vision and values: Misunderstood tools
- Managing those who are smarter than you
- Developing symbiosis with your Board

The CEO as Chief Decision Maker

- The fatal flaws that lead to bad decisions
- How to escape the bubble of ignorance
- The echo chamber and your Achilles heel
- Risk management intelligence & capability

Building Organizational Resilience

- Dealing with crisis and high-impact surprises
- Building smarter & tougher organizations
- Drivers of business model transformation
- What ultimately constrains performance

The Ultimate Responsibilities of Leadership

- Dealing with slippery ethical dilemmas
- How to find and evaluate your successor
- The mindset and resolve of a great leader
- Actions you must take & questions you need to answer before your time ends



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