

CPABC PROFESSIONAL DEVELOPMENT | 2021

# Executive Programs

# Moving You Forward

Discover how you can move yourself and your organization forward



**CPA**

CHARTERED  
PROFESSIONAL  
ACCOUNTANTS  
BRITISH COLUMBIA

# Moving You Forward

Executive programs are multi-day, interactive, and in-depth programs. The in-residence and online formats are designed to increase the scope of 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 your professional network.

Our inventory includes programs tailored specifically for current or aspiring controllers, CFOs, and CEOs, as well as members seeking more specific training in areas such as governance, negotiating, and enterprise risk management.

Learn more at [pd.bccpa.ca/pd-in-depth](https://pd.bccpa.ca/pd-in-depth)



CPABC  
**Executive Programs**

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# The CPABC Executive Program Experience

Fast-track your leadership growth—and your career—through a transformative learning experience.

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



**1,592**

**participants**

have attended

CPABC's

Executive Programs.



**84%**

of our alumni gave

**4.7/5** average rating for  
our **Faculty Members**.

**4.4/5** average rating for  
our **Executive Programs**.

Our Executive Programs often sell out quickly. Spaces are allocated on a first-come, first-served basis. We endeavour to schedule additional offerings to meet demand when possible, but encourage you to register early to avoid disappointment.



In 2020,

**91%\***

of participants found  
CPABC's Executive Programs  
to be **valuable**.

**88%\***

of participants would  
**recommend** the executive  
program they attended  
to others.

**98%\***

of participants found the  
**online experience** satisfactory.

\*Percentage derived from the number of participants who responded to our Executive Program feedback survey

# Special Program Features



In a unique executive learning environment, you will have the opportunity to build relationships, collaborate, and share insights with peer executives. Participants are encouraged to stay on-site for in-person programs.

CPABC offers stand-alone and two-part Executive Programs. Participants will receive a certificate of completion from the Chartered Professional Accountants of British Columbia.

Note that two-part programs can be completed in any order as they focus on separate and distinct skills. Participants can choose to complete only one component, but if you complete both components you will receive a certificate of completion.

## Stand-alone programs

designed to prepare you for the challenges ahead:

- CFO as Navigator
- The CEO Program
- Enterprise Risk Management Fundamentals
- Smart Leaders 2023
- Governing with Intention™

## Two-part programs

designed to provide you with the foundation for success:

### Controllership:

- Controllers' Operational Skills Program
- Controller's Management Program

### CFO:

- CFO's Operational Skills Program
- CFO's Leadership Program

## WHAT IS INCLUDED

The registration fee includes a comprehensive workbook (hard copy + digital), as well as all related seminar supplies. In-person offerings also include some meal service.

## PREPARING FOR A PROGRAM

Some programs may require participants to complete pre-readings or pre-work surveys. You will receive information about the pre-work approximately four weeks prior to the program start date.

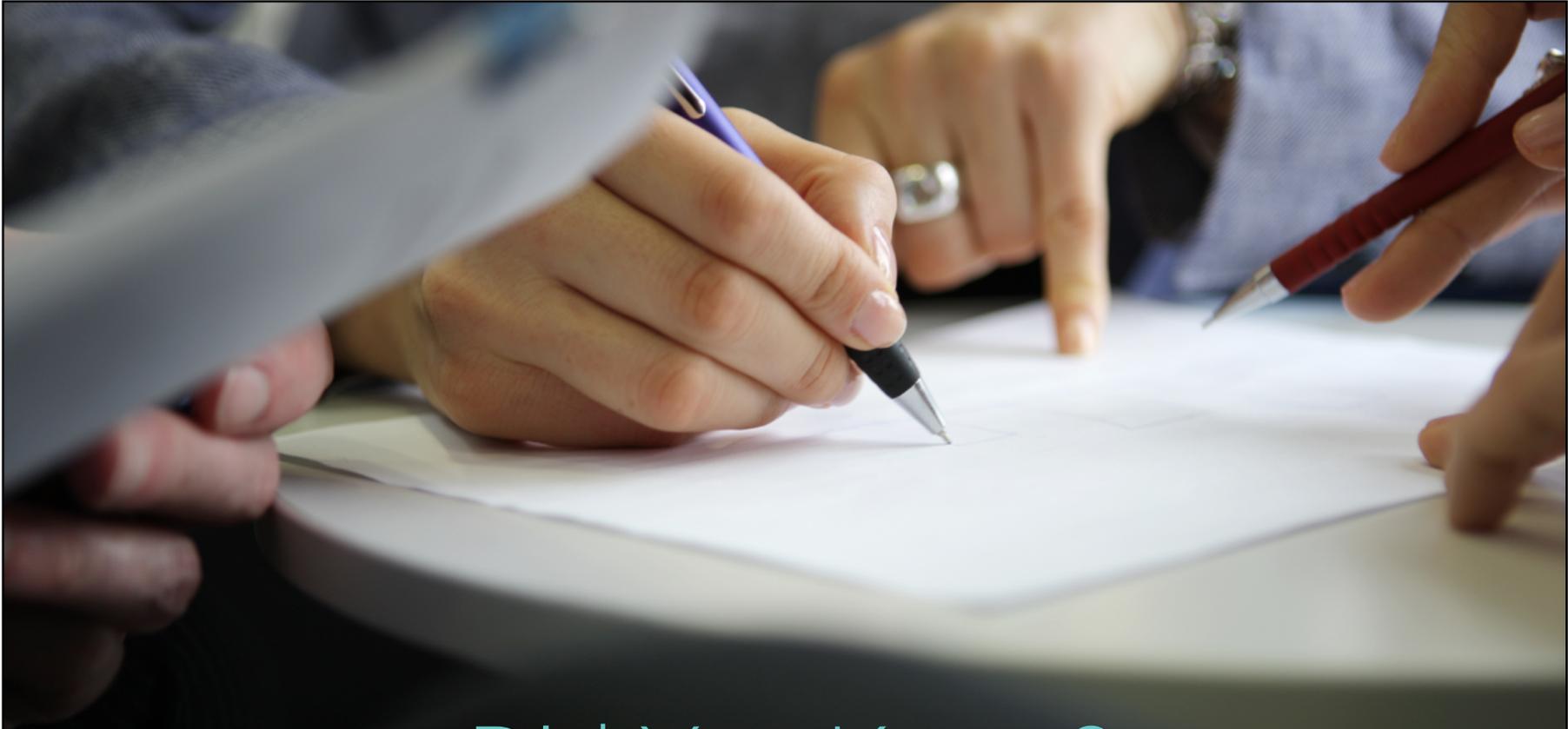
## TECHNICAL REQUIREMENTS FOR VIRTUAL PROGRAMS

Where programs are offered through Zoom Conferencing, participants will need:

- Reliable high-speed internet access.
- Desktop computer, laptop, or tablet.
- A webcam, speakers, and microphone (or the ability to dial-in). These are strongly recommended due to highly interactive portions of the program.

## ACCOMMODATION FOR IN-PERSON PROGRAMS

The accommodation costs for in-residence programs are separate. Please visit our website for more information.



## Did You Know?

The **BC Employer Training Grant** program is designed to assist employers in providing skills training to new or current employees that will develop skills and certification, upgrade skills needed due to automation, and enhance productivity.

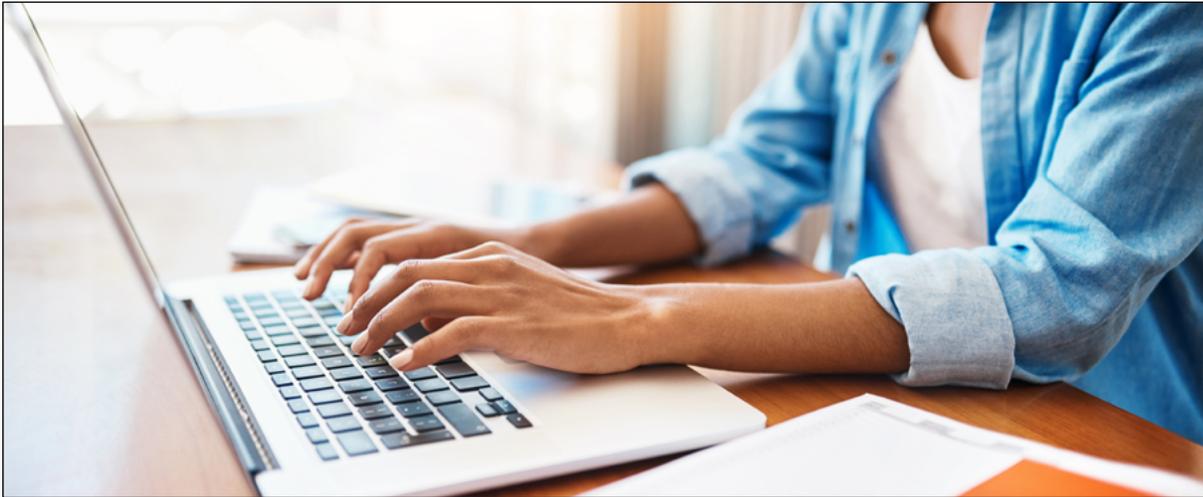
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The maximum an employer can receive per fiscal year (April 1<sup>st</sup> – March 31<sup>st</sup>) is **\$300,000 in total government funding.**

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Learn more at [pd.bccpa.ca](https://pd.bccpa.ca)

# High-Impact Virtual Experience



Most Executive Programs in 2021 will be held virtually via Zoom Conferencing, and special pricing for the online offerings has been applied. CPABC's Executive Programs went through a vigorous digital conversion and offer an optimal interactive remote learning and practical hands-on experience.

## Unique benefits of a virtual Executive Program experience:

### Connect and Collaborate

Virtual delivery has the added feature of interactive Zoom functions to engage participants and easier exchange of ideas.

### Newly restructured days

Some programs are available in a multi-week split format allowing participants to manage their time between work and family commitments.

### Flexible

No travel restrictions, and save on travel and accommodation costs.

### Support from the PD Team

A dedicated PD Program Coordinator will be on-hand during the program to offer technical assistance, as well as to answer questions pre- and post-program.

## Here's what our Executive Programs alumni say about their virtual learning experiences:

*"I was a bit concerned about the virtual program, however, I felt that the facilitators did a great job with mixing up the presentations with different sized break-out sessions. Breaks were also well planned. By the end of the first day I was used to the technology and really enjoyed the virtual interaction. I actually think it was easier for me to participate virtually, than it would have been in-person."*

*"It was a unique experience and I find it more productive than in-person learning. I was able to focus and concentrate more"*

*"The Zoom technology worked really well. I liked being able to connect with so many of the other participants and to learn from them in "safe" little break-out rooms."*

## » WANT TO LEARN MORE ABOUT PD SEMINARS VIA ZOOM?

Review [basic tips on security and features](#), or read the [Zoom Attendee Guide](#) produced by the CPABC PD team.

# Current Programs

## CONTROLLERSHIP PROGRAM

Created with the aspiring and new Controller in mind.

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The **Controller's Operational Skills Program** focuses on the core technical processes and procedures of the financial role.

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The **Controller's Management Program** focuses on honing your personal and interpersonal effectiveness.

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Pages 13-16

## CFO PROGRAM

Geared towards aspiring and new CFOs.

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The **CFO's Operational Skills Program** focuses on the strategic technical competencies of the role.

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The **CFO's Leadership Program** focuses on developing the skills needed to be an influential leader in your organization.

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Pages 17-20

## CFO AS NAVIGATOR PROGRAM

Geared towards seasoned financial executives.

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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.

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Pages 21-22

## THE CEO PROGRAM

Geared towards current and aspiring leaders.

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The **CEO Program** is a practical and provocative stand-alone advanced program for current and aspiring leaders seeking to excel in the executive suite.

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Pages 23-24

# Current Programs



## ENTERPRISE RISK MANAGEMENT FUNDAMENTALS

Geared towards financial professionals seeking knowledge in risk management.

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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 in enterprise risk management.

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Pages 25-26



## SMART LEADERS 2023

Geared towards leaders in positions of executive responsibility.

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**Smart Leaders 2023** is a stand-alone program for leaders seeking to liberate their genius, to change the way they think, and to strengthen their capabilities as decision makers, risk-takers and innovators to meet the demands of an increasingly volatile and complex business environment.

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Pages 27-28



## GOVERNING WITH INTENTION™

Geared towards directors and professionals who play a role in their organization's governance.

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**Governing with Intention™** is a stand-alone program for current or incoming directors and professionals seeking leading governance best practices, to elevate their personal and their board's contribution at the board table, and the skills to navigate the modern boardroom.

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Pages 29-30

# Faculty



**TERESA BUDD, BA, LLB**, collaborates with WATSON as a governance consultant with 20 years' experience in governance and law in both Vancouver and Toronto. She has worked with private and public companies, Crown agencies, municipal corporations, member-based organizations, regulatory bodies, and not-for-profit organizations. Teresa conducts governance reviews, board evaluations, corporate secretarial practice assessments, and supports multiple boards as an outsourced corporate secretary. She is a facilitator in WATSON's Governance Academy delivering governance education programs to both individual directors and boards.

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**TERESA FACILITATES**  
Governing with Intention™



**DR. VIJAY JOG** is the founder of Corporate Renaissance Group (a Quisitive Company), a firm dedicated to driving better business management and performance. He has led CRGroup's growth in areas of strategic finance, corporate performance and dashboards, FP&A and analytics, strategy design and execution, helping clients bridge 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.

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**VIJAY FACILITATES**  
The CFO as Navigator Program



**LINDA LUCAS, CPA, CMA** provides CEO, COO, and CFO services to small- and medium-sized companies throughout the Lower Mainland in BC. She specializes in helping business owners identify and execute their strategic objectives, build strong teams, and achieve operational excellence. Additionally, she provides leadership training to management teams across all industries to develop confident, dynamic, and collaborative leaders of tomorrow.

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**LINDA CO-FACILITATES**  
The Controller's Management Program

# Faculty



**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 25 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.

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### **MIA FACILITATES**

The Controller's Operational Skills Program

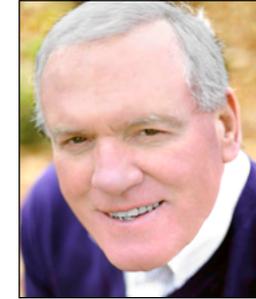


**LESLEY-ANN MARRIOTT, CEC, PCC**, is a certified executive coach who holds the advanced credential of professional certified coach. A former executive in the food industry, Lesley-Ann has over 25 years of leadership and management experience. She has facilitated hundreds of corporate partnerships at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

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### **LESLEY-ANN CO-FACILITATES**

The Controller's Management Program  
The CFO's Leadership Program



**DR. JIM MURRAY** is CEO of *optimal solutions international*, a firm dedicated to helping people achieve their full potential. Jim has taught courses for CPABC since 1982. He is the architect of several advanced residential programs for five provincial CPA bodies, has published four best-selling books, and provided his strategic counsel to well over 600 organizations. He has been nationally honoured by the university community and formally recognized for "excellence in the design and delivery of life-long learning". Read his full bio on *SmartLeaders.ca*.

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### **JIM FACILITATES**

The CEO Program  
Smart Leaders 2023

# Faculty



**JEFFREY D. SHERMAN, MBA, CIM, FCPA, FCA** (Ontario), is CEO of Terragram Investments Ltd. and CFO of Sun Residential REIT (TSXV: SRES), and has over 25 years' experience as a corporate director and executive in real estate, high tech, biotechnology/medical, and financial services. Mr. Sherman 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 corporations and provincial associations of chartered professional accountants across Canada. He has written many magazine articles and over twenty books including *Strategy and Planning Toolkit for Small and Medium Businesses* (published or co-published by CPA Canada).

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**JEFFREY FACILITATES**

The CFO's Operational Skills Program



**TAMMY TOWILL, MBA, FCPA, FCMA** is a partner in the Cordura Group and Chair of the School of Business for Capilano University, providing business advisory services and related education and training programs to organizations and communities seeking growth or change. For over 25 years, Tammy has worked with private and public sector companies throughout North America and Europe, providing education, training, and facilitating in leadership, strategy, business planning, and curriculum development and implementation. She has served on and worked with several boards in Canada and the US.

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**TAMMY CO-FACILITATES**

The CFO's Leadership Program



**WILLIAM (BILL) WESIOLY, CPA, CMA** (Ontario), is a risk management consultant. His background is in the financial services industry, first with BMO and then with RBC. The last 15 years of his banking career was in successfully building and leading risk management programs.

He currently teaches with CPA Ontario and CPAs in other provinces including CPABC. His recent consulting assignments included Buduchnist Credit Union, Atlantic Credit Union, Hillfield-Strathallan College, Canadian Stewardship Services Alliance, Ministry of Environment Canada - Great Lakes Region, and the Ktunaxa First Nations. He is the author of a Management Accounting Guideline for CPA Canada – A Practical Approach for Managing Risks in Small- and Medium-Size Organizations.

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**BILL FACILITATES**

Enterprise Risk Management Fundamentals

# Operational Skills Program



*“The program enhanced my knowledge on my role as a controller and filled gaps. It was an excellent learning experience to reflect at discussions with other controllers.”*

*“Wonderful, course instructor was amazing and made a real connection with members through experiences.”*

## 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 controllership.

## WHO SHOULD ATTEND

Are you responsible for management and financial reporting? Do you want to build upon your operational skills and knowledge of controllership? 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.

# Curriculum

## 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.

## FACULTY

Mia Maki, BA, MBA, FCPA, FCMA

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## 2021 DATES

**May 19-20, 26-27**

Online virtual

**July 14-17**

Online virtual

**September 20-21, 27-28**

Online virtual

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## PRICING

**Special pricing for the virtual offerings**

\$2,000 + GST

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**CPD:** 25 hours

**Ethics Content:** 4 hours

## THE CONTROLLER'S Management Program



*“I liked that the program gave me insight into how I acted as a leader and how I could improve. It gave me some good takeaway action.”*

*“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.”*

### 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 four 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

# Curriculum

## 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

## Communication Skills

- Know how to adapt your message and delivery for specific audiences and situations
- Appreciate the importance of non-verbal communication
- Learn to effectively negotiate and collaborate with your colleagues
- 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

## FACULTY

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

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## 2021 DATES

**May 6-7, 13-14**  
Online virtual

**November 18-19, 25-26**  
Online virtual

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## PRICING

**Special pricing for the virtual offerings**  
\$2,000 + GST

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**CPD: 29 hours**

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## UNIQUE FEATURES INCLUDE

- Comprehensive pre-work surveys including 360 degree leadership survey
- State of the art self-awareness assessment
- Private one-on-one executive coaching session

# Operational Skills Program



*“Unconventional with the right mix of technical and practical application.”*

*“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 within my organization.”*

## OBJECTIVE

The role of the CFO has evolved constantly, never more so than during the pandemic. This course will reinforce your operational skills and provide fresh ideas as you guide your organization and yourself through the recovery.

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. As senior advisor to the CEO and the board, the CFO has at least six roles: business partner, scorekeeper, commentator, expert, custodian, and conscience. 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. Get up to speed on corporate governance and risk management along with changes resulting from the pandemic and post-pandemic business environment. Explore the critical CFO competencies in business valuation, strategic planning, M&A and behavioural economics. Learn how to effectively communicate with internal and external stakeholders.

## 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.

This program will help you

- Improve operational effectiveness of your department and organization
- Enhance the control environment
- Apply insights from behavioural economics
- Understand how to integrate governance, strategy, and sustainability
- Learn how COSO's Enterprise Risk Management can enhance shareholder value
- Apply the right techniques when reviewing acquisitions
- Plan the optimal capital structure

# Curriculum

## Governance, Strategy, and Risk Management

- Stakeholders, shareholders, and the board
- Culture, ethics, and wisdom
- Role of the CFO
- Behavioural finance and behavioural insights
- Integrating governance and strategy
- Sustainability and risk management

## Creating Value Through Financial Management

- The new normal: post pandemic business
- Operational and financial tools
- Internal control and COSO's Internal Control – integrated framework
- Communicating with stakeholders

## Corporate Finance

- Mergers and acquisitions: due diligence and valuing a business
- Optimal capital structure

## FACULTY

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

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## 2021 DATES

November 15-16, 22-23  
Online virtual

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## PRICING

**Special pricing for the  
virtual offerings**  
\$2,000 + GST

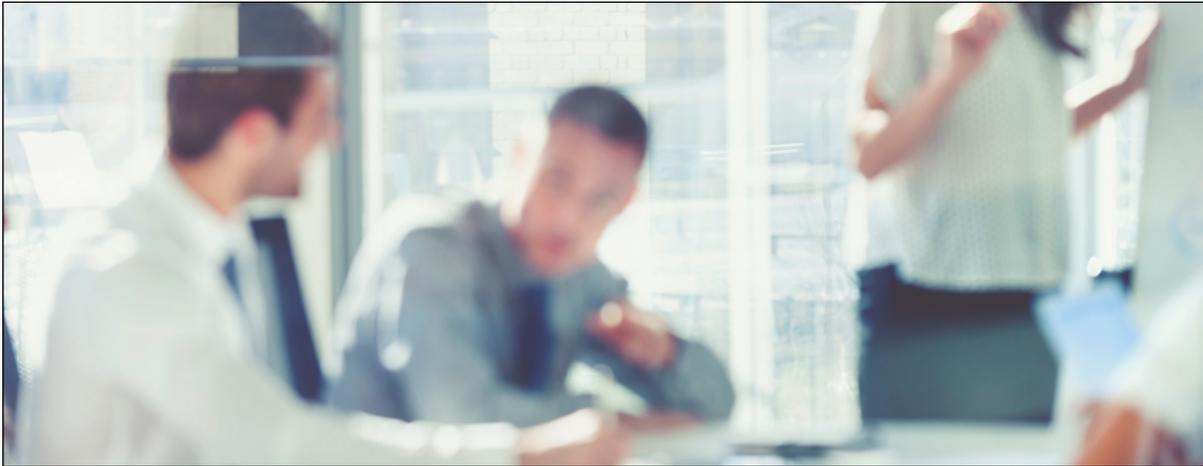
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**CPD:** 28 hours

**Ethics Content:** 4 hours

THE CFO'S

# Leadership Program



*“Turned the skeptical ‘been there, done that’ attitude into ‘wow, would love to do more’...”*

*“This was very valuable time spent. Magic formula of great facilitators, great content, engagements from the attendees.”*

## 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 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 and influencing across all stakeholders.
- Leading culture and change.

The course is offered in four-day face to face, retreat and virtual formats. Participant 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.

# Curriculum

## 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 communications
- Receive feedback that will enhance your specific style
- Learn the latest techniques for persuasive communications
- 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

## FACULTY

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

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## 2021 DATES

**June 17-18, 24-25**  
Online virtual

**September 9-10, 16-17**  
Online virtual

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## PRICING

**Special pricing for the virtual offerings**  
\$2,000 + GST

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**CPD: 28 hours**

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## UNIQUE FEATURES INCLUDE

- Comprehensive pre-work surveys include 360-degree leadership and organizational assessment
- State of the art self-awareness assessment
- Confidential one-on-one executive coaching session

FOR SEASONED FINANCIAL EXECUTIVES

# CFO as Navigator Program



*“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.”*

*“Great high level program that still managed to deliver practical skills and information to take back to my organization and implement immediately.”*

## OBJECTIVE

CFOs are under pressure and COVID has not made it any easier, every CFO is hearing call from the corporate boardroom to “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, and Monthly/Quarterly/Annual (M/Q/A) financial and management reporting.

The CFO as Navigator Program is designed to make you a complete CFO. It will provide you with a highly applied and interactive experience, and will cover areas such as: value creating growth, value metrics, intersection of strategic finance and strategy, strategy maps and performance metrics, enterprise dashboards, modernizing of FP&A, digital transformation and

digitized finance, ERM, and talent management and incentive design. 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 what it takes to be the 21st century innovative CFO.

## WHO SHOULD ATTEND

Do you want to be at the nexus of decision making in your enterprise? Do you ever wonder about the role of strategy and business models and their linkage with strategic finance? Do you feel that you are under pressure and thus are energized to modernize your enterprise and go beyond the stovepipe finance function? Are you interested to provide a 360-degree view of the enterprise performance and manage the business with the single

version of the truth through metrics and dashboards? Do you want to digitize & modernize your FP&A and ERM functions? If so, then this program is for you.

This program is geared particularly towards those CFOs/Controllers in mid and large private sector companies who are at the zenith of their career, who embrace change and want to make a bigger difference in their team and their enterprise.

# Curriculum

## Dealing with the Volatile World

- The volatile world - new rules of the game
- Increased need to be agile
- 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
- Vision, mission, core values - do they have a role?
- Designing breakthrough strategies that work

## Strategy Execution and ERM

- Design and role of strategy maps
- Designing and using enterprise dashboard
- Enterprise Risk Management and scenario planning
- Designing incentives that work

## Digital Transformation

- CPM and BI
- Going beyond FP&A
- Focusing on Value drivers and Non-financial metrics

## Managing Human Capital and Talent

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

## FACULTY

Dr. Vijay Jog

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## 2021 DATES

September 13-15, 20-21

Online virtual

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## PRICING

Special pricing for the virtual offerings

\$2,000 + GST

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CPD: 26 hours

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## UNIQUE FEATURES INCLUDE

- Three full day sessions and two sessions of 2.5-hours group work between the full day sessions.

# The CEO Program: Acquiring the Edge and Leading with Purpose



*“Unlike any leadership program I’ve ever taken. Far superior to the six months of executive coaching I’ve received. I was engaged 100% of the time. This course has changed my life.”*

*“My biggest, and most favourite, takeaway was what I learned about myself.”*

## OBJECTIVE

This proven, mini “executive MBA” program has been offered to hundreds of senior members of the accounting profession across the country for well over a decade. It is designed for both current and aspiring leaders seeking to excel with confidence in the upper echelons of executive responsibility. The testimonials from prior attendees are all you need to read to understand the benefits of “going back to school” to contend with the increasingly unpredictable demands of an ambiguous, volatile, disruptive, complex business environment.

Because of COVID, this one-of-a-kind learning experience is now available online. But it remains as interactive, highly pertinent, real and challenging as the in-class presentation. It answers the critical question: Do you possess the emotional and mental qualities, interpersonal skills, street-smart insights, decision-making savvy and executive presence to lead?

Do you know what it really takes? Can you handle the dynamic, fluid forces that will impact your business: changing

stakeholder expectations, decaying business models, archaic management practices, bad strategies, the ever-daunting but unanticipated risks and “black swan” events largely beyond your control? Leaders who can do this are in demand and they know it.

Leading with purpose requires the ability to build one’s strategic intelligence, prick the bubble of ignorance, recognize career derailers, select the right talent, develop a cohesive executive team, respond courageously to high-impact surprises, devise strategies that both inform and inspire, foster an adaptive culture of resilience and create a business model that competes for the future. Leadership today means dealing effectively with ethical dilemmas, knowing how to lead those who are brighter than you, designing a smart and healthy organization, and deciding when “the game” must be retooled.

This practical, intensive, provocative, advanced executive program is the creation of Dr. Jim Murray who has successfully

led large and small organizations in both the public and private sectors. He has a remarkable track record over the course of five decades of exemplary performance of helping senior executives in more than 600 organizations achieve their underappreciated potential. His life’s quest is to liberate genius and change lives. This program has a limited enrollment and a history of selling out early – don’t miss your opportunity.

The revamped online program consists of seven three-hour sessions over three weeks. It includes two pre-course workbooks and an instructional manual of supplemental readings, instructive cases to hone decision-making skills, numerous diagnostic instruments, shared executive experiences and performance coaching if desired. The learning experience is realistic, reflective of the latest research and personally challenging. The depth, breadth and sharing of participant experiences is one of the primary benefits. The following is a top-line outline of the sessions and topics to be addressed in 2021. The full curriculum is outlined on our website.

# Curriculum

## The Opportunity and Realities of CEOdom

- The premise, objectives, caveats and roles
- What makes a leader: Skills & stylistic nuances
- Lesson #1: Avoid the fatal flaws or get the axe
- How to survive & thrive in the zone of complexity
- Finding, defining & shaping your leader identity
- The difference between the good and the best
- The gritty truths & diseases of being the top dog

## The Challenges of Leadership in the C-suite

- The elusive, fragile, essential imperative of leading
- Who make better CEOs: Men or women?
- Smarts that separate leaders from the pretenders
- Achieving clarity, focus & results: The CEO Mantra
- Organizational DNA: Manipulating critical genes
- Rethinking strategy: Realities & faulty assumptions
- If you're new: What to do from day one to day 100
- Diagnosing the health and savvy of your enterprise

## The Elements of Extraordinary Leadership

- The CEO Entrance Exam: Questions you must answer
- Making good choices: Time, priority & energy audits
- Self-assessment: Do you really have what it will take?
- Setting your compass: The non-negotiable rules
- Getting the best advice & building reliable networks
- Executive presence: Power, politics & self-promotion
- Reconciling the five paradoxes of being the top dog
- Sustaining drive: Fueling productivity & willpower

## Overcoming Obstacles to Higher Performance

- Building a cohesive & focused executive team
- Inner circles, EAs or a CoS?: How to choose them
- Vision, purpose, values & rules: Misguided tools
- Operationalizing a paradigm shift in your culture
- Leading knowledge workers smarter than you are
- Developing a symbiotic relationship with the Board

## The CEO as the Chief Decision Maker

- The CEO effect: Why good leaders deserve their pay
- The bubble of ignorance: What, why & how to escape
- The three decision domains that make or break you
- How to avoid really bad decisions: The new tool box
- Overcoming the Echo Chamber: Changing the culture
- Finding the best experts: The traps you need to avoid
- Enriching decision making & knowing you're right
- Risk intelligence: Analysis, tolerance & framing
- Nurturing beneficial, credible two-way feedback

## Building Resilience and Fostering Innovation

- Leading in a crisis: Dos, don'ts & prevention antidotes
- What ultimately constrains high(er) performance
- Forecasting high-impact surprises, unknowns & luck
- The elements & architecture of a smart enterprise
- Fostering workforce innovation: Tips & techniques
- Countering obsolescence: Required competencies
- Intelligent failure: A paradigm for symbiotic growth
- Business model transformation: Different approaches
- Strategies for growing your business in a VUCA world
- The forms, avenues, caveats & trade-offs of growth

## The Ultimate Responsibilities of Leadership

- Navigating ethical dilemmas: The tricky slippery slope
- Embracing the highest calling of exemplary leadership
- Succession planning: How to find your next CEO
- Acquiring the mindset: Destinations worth considering
- What you can't be taught but must learn for yourself
- Dr. Jim's Top 10 List: What Smart Leaders must know
- Leading with purpose: The six unavoidable questions
- Going forward: Achieving your destiny as a great CEO

## FACULTY

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

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## 2021 DATES

June 1-4, 14-16

Online virtual

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## PRICING

Special pricing for the  
virtual offerings

\$2,000 + GST

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CPD: 26 Hours

Ethics Content: 1.5 hours

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## UNIQUE FEATURES INCLUDE

- Seven sessions of three-hours duration spread over three weeks
- Two pre-course workbooks and a 100+ page instructional manual
- Seven relevant case studies to strengthen decision-making skills
- Organizational and personalized diagnostic tools and templates

# Enterprise Risk Management Fundamentals



*“By far the best program I have attended. Have acquired relevant tools to take back and implement with the management team.”*

*“A lot of the ERM-specific content. Also, the capabilities of Zoom which was a bit of a side benefit!”*

## OBJECTIVE

In our increasingly complex environment, it is critical that finance professionals understand and embrace risk management as a key discipline. This three-day, six 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:

- Learn about the Enterprise Risk Management (ERM) Framework.
- 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 key risk management tools: Risk and control assessments, risk bow tie, 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 and/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.

# Curriculum

## Introduction to Enterprise Risk Management

- Definitions - Risk and Enterprise Risk Management
- ERM and corporate governance
- Benefits and limitations of ERM
- The ERM “Wheel” Framework

## Establish Context for Managing Risk

- Establishing the tone at the top
- Risk management and the culture of the organization
- Risk appetite
- Risk taxonomy
- Roles and responsibilities

## Risk Identification and Risk/Assessment

- Risk identification – approaches/techniques to identifying risk
- Risk prioritization – inherent risk and residual risk
- Risk measurement criteria
- Risk heat maps and risk registers
- Risk and control assessments

## Risk Treatment/Response

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

## Risk Monitoring and Risk Reporting

- Areas of priority for monitoring
- Key performance indicators
- Key risk indicators
- Who’s the audience - Various types of stakeholders for reporting
- Best practices in effectively communicating and reporting to senior executives/board

## Incorporating Strategic Decisions and Implementing ERM

- Incorporating ERM into strategic decisions
- Tips for successfully implementing ERM into your organization

## FACULTY

Bill Wesioly, CPA, CMA

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## 2021 DATES

May 5-7

Online virtual

October 18, 20, 22

Online virtual

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## PRICING

Special pricing for the virtual offerings

\$2,000 + GST

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CPD: 23 hours

Ethics Content: 0.5 hours

# Smart Leaders 2023



*“... forced me to better understand who I am and where I have weaknesses in my thinking. I feel energized and invigorated.”*

*“I obtained the thinking tools needed to build a culture of resilience, risk-taking and innovation in my company.”*

## OBJECTIVE

Organizations live or die on their leaders' ability to solve problems. This unique, provocative, time-tested learning experience has been offered to hundreds of executives across the country for over two decades. It's re-engineered yearly to keep up with the incessantly unpredictable challenges they must confront. The testimonials from prior attendees are all you need to read to understand the benefits of “going back to school” to deal with the demands of an increasingly ambiguous, volatile, complex business environment.

Thinking differently (and more effectively) is the key to success in everything you'll ever do. Our brainpower isn't the issue; we're born with intelligence. But having it and knowing how to use it are entirely different things. Those who've mastered only one way of thinking, as the result of a

specific discipline or profession, are especially vulnerable to the radically different challenges we face today.

To lead in an uncertain, disruptive and error-prone world, we must strengthen and rely on our capabilities as decision makers, risk-takers and innovators. We must be ‘plugged into’ the future and know how to reframe old-paradigm strategies into new-world breakthroughs.

Creative thinking – a skill we were never taught in school – is neither a gift nor a consequence of magical inspiration. It's the mindset of every smart leader. When you have a toolbox of different approaches for filtering and framing problems, you find better answers for leading others. Smart leaders simply have the biggest toolboxes and the best tools.

The purpose of this one-of-a-kind, executive program, which has evolved over the course of five decades of research, is to give you the techniques and insights for changing the way you think and the organization you lead. Extraordinary leaders are just ordinary people who can think differently under pressure. As prior attendees say, this program has changed lives. It's offered once a year and sells out early. Don't be disappointed.

## WHO SHOULD ATTEND

Leaders who seek to liberate their own genius and that of their workforce. The most significant competitive advantage you'll ever possess is the ability to think on all cylinders. Your destiny lies not in what you know, but in what you do with what you know.

# Curriculum

## The Mind and Resolve of a Smart Leader

- The premise, objectives, caveats, roles & outcomes
- Challenges, threats and issues facing leaders today
- Complexity, chaos & the law of accelerating returns
- Dealing with big data & the knowledge explosion
- Automation, disruption, AI & your job tomorrow
- Five minds for the future: The ones that do count
- Integrative thinking: The Smart Leader thesis

## Thinking Styles: As We Think So We Become

- Perception: How the brain makes up its own reality
- Hard truths about creative and analytical thinking
- Head vs. gut: Understanding our internal conflicts
- Why we have such difficulty solving real problems
- The tricks our brains play on us & the consequences
- Mind traps, cognitive biases & delusional thinking
- How to speak to your brain & make it listen to you

## Overcoming the Barriers to Creativity

- Bubble knowledge: What will destroy you as a leader
- The biggest impediment to our creative thinking
- Getting beyond 'The Box': Self-imposed limitations
- The hardware & the software: How the brain works
- Understanding the neurobiology of fear and risk
- Intuition, intelligence, imagination & insight
- The origins of every brilliant business decision
- IQ, creativity & execution: How you stack up
- A simple, effective & better way to solve problems

## Fostering Workforce Resilience and Innovation

- A framework for innovation: From origin to execution
- The critical business differentiators going forward
- The art of the pitch: Winning over savvy customers
- Rooting out dogma, groupthink & under-performance
- Auditing organizational DNA: The innovation payoff
- Reconciling the paradoxes of efficiency vs. creativity
- Building and managing an enduring innovation culture

## Group and Individual Thinking Techniques

- How to evaluate and sell your ideas: Easy, simple and fast
- Attention management: Reframing our existing paradigms
- The power of groups vs. going it alone: When & how
- Alternative approaches to generating prolific ideas
- Pros, cons & applications of different thinking tools
- Twenty+ ideation methods for solving your real problems
- The pathway for analyticals to become more creative

## Liberating the Power of Your Genius

- Does creativity have an age limit or a gender bias?
- Brain health: How to prevent serious cognitive decline
- Stress reduction & sleep: What medical science tells us
- Aging, dementia & longevity: Will you have enough left?
- Brain fitness: Either use it or lose it – the choice is all yours
- Investment planning: Key ingredients in the SL recipe
- The critical differences between intelligence & genius
- What smart leaders know that others don't understand

## FACULTY

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

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## 2021 DATES

November 2-4, 16-18

Online virtual

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## PRICING

Special pricing for the virtual offerings

\$2,000 + GSTT

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CPD: 24 hours

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## UNIQUE FEATURES INCLUDE

- Six sessions of three-hours duration spread over three weeks
- Two pre-course workbooks of readings & diagnostic tasks
- A 100+ page instructional manual and supplemental notes
- Opportunities to solve your most troublesome problems

NEW FOR 2021

# Governing with Intention™



*Explore the critical role of the board chair, with practical advice on how to tackle key issues in and between meetings and walk away with a customized action plan to elevate your board's contribution and help your organization perform better.*

## OBJECTIVE

Over the last decade, there has been an explosion of research and thinking on what constitutes good governance. Yet, directors struggle to convert principles to practice. At the same time, governance continues to evolve, and expectations of directors are becoming more demanding in an increasingly complex world.

This three-day workshop combines WATSON's flagship Governing with Intention™ course and key components of Chair with Intention™ course to equip current and future directors with the skills to navigate the modern boardroom.

Balancing practical tips with leading governance practices, participants learn how to shift the dialogue to the issues that matter, navigate the line between governance and management, elevate their personal contribution at the board table, and design a positive board culture. Participants also explore the critical role of the board chair, with practical advice on how to tackle key issues in and between meetings. Participants will walk away with a customized action plan to elevate their board's contribution and help their organization perform better.

## WHO SHOULD ATTEND

- Current, new, or incoming directors and board chairs
- CEOs looking to better understand how to partner with the board
- Members of management who play a role in their organization's governance
- Professionals who work with boards

# Curriculum

## Governing with Intention™

- Explore the principles of an intentional approach to governance
- Understand and apply fiduciary and legal duties
- Apply WATSON's "Managing the Line" between governance and management
- Learn leading renewal practices
- Determine ways to maximize contributions of key roles on the board and management team
- Strengthen board culture by identifying and adopting practices specific to the board/management relationship
- Shift to a more strategic perspective

## Chair with Intention™

- Clarify the attributes and responsibilities of an effective chair
- Lead meetings to enhance director contributions and elevate conversations
- Strengthen relationships with key stakeholders
- Develop a finely balanced CEO-Chair relationship and clarity in oversight
- Explore emergent practices in chair renewal, from recruitment and orientation to evaluation and succession
- Refine facilitation skills to foster a stronger culture and dialogue

## FACULTY

Teresa Budd, BA, LLB

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## 2021 DATES

October 28-29, November 4

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## PRICING

**Special pricing for the virtual offerings**

\$2,000 + GST

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**CPD:** 21 Hours

**Ethics Content:** 1 hours

[» REGISTER NOW](#)



CPABC

## Executive Programs

CPABC PROFESSIONAL DEVELOPMENT

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