

Forging Ahead

Deepen and broaden your perspectives and knowledge with CPABC's **Executive Programs**



Forging Ahead

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.

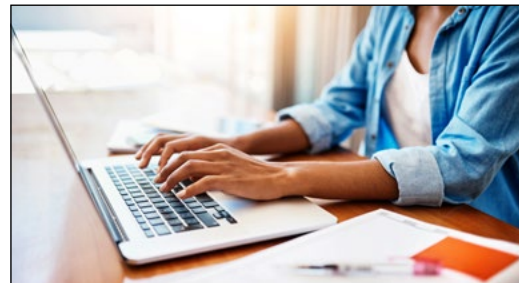
Our inventory includes programs tailored specifically for current or aspiring controllers, CFOs, and CEOs, as well as members seeking more specific training in areas such as innovative thinking, negotiating and enterprise risk management.

Learn more at 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.



2,076

participants
have attended
CPABC's
Executive Programs.



84%

of our alumni gave

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

4.5/5 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 2022,

92%*

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

97%*

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

100%*

of participants from virtual
offerings found the **online**
experience satisfactory.

*Percentage derived from the number of participants
who responded to our survey

Special Program Features



In a unique executive learning environment, you will have the opportunity to build relationships, collaborate, and share insights with executive peers.

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

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 2025
- The Optimal Negotiator

Two-part programs designed to provide you with the foundation for success:

Controllership Program:

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

CFO Program:

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

Note that while in-person and online virtual options will be offered in 2023, not all Executive Programs are available in both delivery formats.

WHAT IS INCLUDED

The registration fee includes a comprehensive workbook (hard copy and 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.



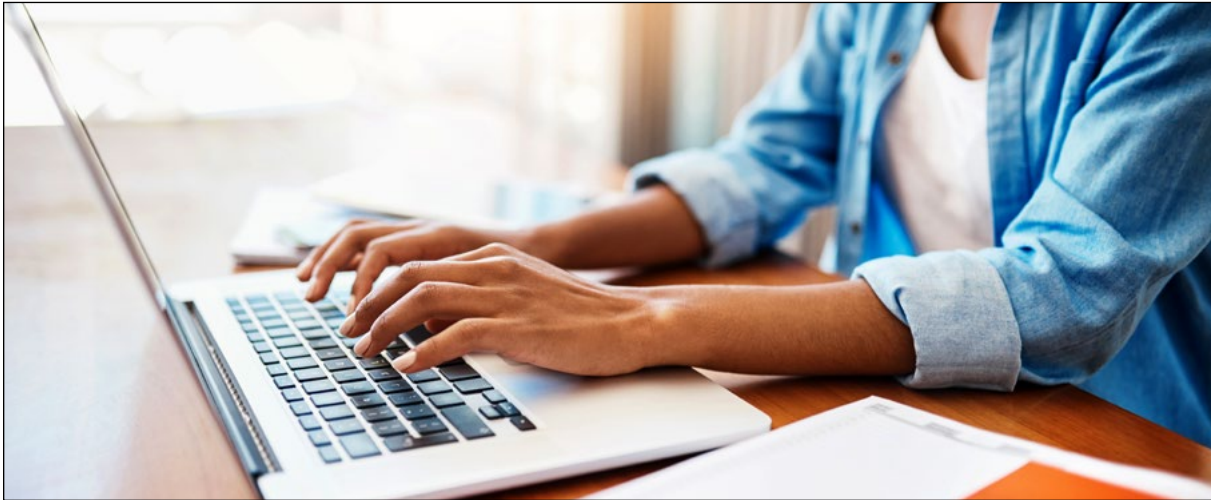
Did You Know?

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.

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

Learn more at pd.bccpa.ca

High-Impact Virtual Experience



A majority of CPABC's Executive Programs will be available virtually. The programs went through a vigorous digital conversion and were further fine-tuned to provide participants the optimal interactive remote learning and practical hands-on experience.

Unique benefits of virtual Executive Programs:

Connect and Collaborate

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

Multi-Segment Format

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

Flexible

Save on time, and 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:

"Highlight for me was how cooperative everyone was. Everyone shared tips and tricks. Zoom was fantastic, everyone participated and we could participate from the comfort of our homes. I didn't know what to expect, but this was THE best PD course I have taken."

"Love it, excellent for those of us outside the Lower Mainland. Easier to participate since the costs are way down since there is no travel."

"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."

» WANT TO LEARN MORE ABOUT PD SEMINARS VIA ZOOM?

Watch [this video tutorial](#) produced by the CPABC PD team on how to use some Zoom features.

Current Programs

CONTROLLERSHIP PROGRAM

Created with the aspiring and new Controller in mind.

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

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

Pages 12-15

CFO PROGRAM

Geared towards aspiring and new CFOs.

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

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

Pages 16-19

CFO AS NAVIGATOR PROGRAM

Geared towards seasoned financial executives.

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.

Pages 20-21

THE CEO PROGRAM

Geared towards current and aspiring leaders.

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

Pages 22-24

Current Programs



ENTERPRISE RISK MANAGEMENT FUNDAMENTALS

Geared towards financial professionals seeking knowledge in risk management.

The **Enterprise Risk Management Program** is a stand-alone program for financial professionals with at least a few years of experience, who want to further their career and/or add more value to their organization.

Pages 25-26



SMART LEADERS 2025

Geared towards leaders seeking to liberate their own genius and that of their workforce.

Smart Leaders 2025 is a stand-alone program for leaders seeking 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.

Pages 27-28



THE OPTIMAL NEGOTIATOR

Geared towards professionals seeking negotiation mastery.

The Optimal Negotiator Program 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.

Pages 29-31

Faculty



DR. VIJAY JOG is Chancellor Professor Emeritus at Carleton University and the Founder of Corporate Renaissance Group. He has led CRGroup's growth in areas of strategy design and execution, corporate performance and dashboards, strategic finance, FP&A and analytics and has consulted around the world helping clients bridge the gap between performance, technology, strategy, and finance and incentive systems. He has received consistently high accolades for this highly practical program for last ten years.

VIJAY FACILITATES

- The CFO as Navigator Program



LINDA LUCAS, CPA, CMA is a principal of Lead Vantage LLP, where she specializes in helping C-level executives and business owners identify and execute their strategic objectives. Her focus is building strong teams to create a culture of innovation and initiative, resulting in operational excellence and increased profitability. Drawing on over 25 years' experience in strategic, operational, and financial management, she knows that the heart of success, in any organization, starts with their people. Linda develops and facilitates leadership programs that emphasizes empowerment, collaboration, and trust. She has helped her clients – from small-and mid-sized companies to national corporations – cultivate a sustainable, adaptable, and future-forward organization.

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 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.

MIA FACILITATES

- The Controller's Operational Skills Program

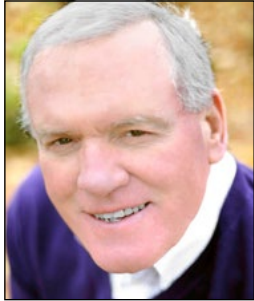


LESLEY-ANN MARRIOTT, CEC, PCC, is a Certified Executive Coach who holds the advanced credential of Professional Certified Coach. A former executive in the food industry, Lesley-Ann has over 25 years of leadership and management experience. She has facilitated hundreds of corporate partnerships at the 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.

LESLEY-ANN CO-FACILITATES

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

Faculty



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”. His full bio is on SmartLeaders.ca.

JIM FACILITATES

- The CEO Program: Acquiring the Edge and Leading with Purpose
- Smart Leaders 2025: Thinking and Innovation Skills
- The Optimal Negotiator: The Definitive Program for Serious Deal Makers



JEFFREY D. SHERMAN, MBA, CIM, FCPA, FCA (Ontario), has over 25 years’ experience as an executive and corporate director in high tech, biotechnology/medical, financial services, and business services. He is a popular presenter, a frequent course director and course author for many organizations, and has created and presents executive development programs and one-day seminars for most provincial Chartered Professional Accountants organizations across Canada. He has written over twenty books including *Strategy and Planning Toolkit for Small and Medium Businesses* and *Finance and Accounting PolicyPro* (guide to governance, procedures, and internal control), both published by CPA Canada.

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 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 US.

TAMMY CO-FACILITATES

- The CFO’s Leadership Program



WILLIAM (BILL) WESIOLY, CPA, CMA (Ontario), is a risk management consultant and Leadership Coach who enriches the effectiveness of people and organizations through both skill and heart. 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 with CPABC. His consulting assignments over the last few years included organizations in the private, public and nonprofit sectors. He has also recently published a Management Accounting Guideline for CPA Canada – *A Practical Approach for Managing Risks in Small- and Medium-Size Organizations*.

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

2023 DATES

May 24-27

Online virtual

September 20-23

In-person, Victoria

December 13-16

Online virtual

PRICING

\$2,250 + GST Online virtual

\$3,500+ GST In-person

Early bird discount for in-person offering:

\$300 off the regular price will apply if registration is completed at least two months prior to start date.

CPD: 25 hours

(includes 4.5 hours of pre-work)

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
- 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
- Explore best practices for leading change and guiding your teams to peak performance

FACULTY

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

2023 DATES

April 20-21, 27-28
Online virtual

October 11-14
In-person, Victoria

PRICING

\$2,250 + GST Online virtual

\$3,500 + GST In-person

Early bird discount for in-person offering:
\$300 off the regular price will apply if registration is completed at least two months prior to start date.

CPD: 29 hours
(includes 3.5 hours for pre-work)

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 with 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, strategy 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
- Stakeholders and shareholders
- Role of the CFO for the organization and the board
- Behavioural finance and behavioural insights
- Integrating governance and strategy
- Sustainability and risk management

Creating Value Through Financial Management

- The new normal: Post pandemic business macro and micro issues
- Operational and financial tools
- Internal control and COSO's Internal Control integrated framework
- Communicating and reporting to stakeholders

Corporate Finance

- Mergers and acquisitions
- Optimal capital structure
- Business valuations refresher

FACULTY

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

2023 DATES

July 6-7, 13-14
Online virtual

October 15-18
In-person, Whistler

PRICING

\$2,250 + GST Online virtual

\$3,500 + GST In-person

Early bird discount for in-person offering:
\$300 off the regular price will apply if registration is completed at least two months prior to start date.

CPD: 28 hours
(includes 3 hours of pre-work)

Ethics Content: 4 hours

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 and driving 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, globalization, 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 move from the technical aspects of being a finance professional, to being a strategic partner and catalyst for organizational change. This program concentrates on areas where CFOs have told us they feel they need the most help:

- Leveraging strategy to get results.
- Persuasive communications.
- Leading and influencing across all stakeholders.
- Leading culture and change.

The course is offered in four-day online virtual and face-to-face, retreat formats. 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 as 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 persuasive 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 and Influencing

- Learn how to develop a more effective leadership style to help lead your organization through globalization and growth
- Learn how to give and receive effective feedback
- Explore how to plan for and manage the risks associated with 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

2023 DATES

May 17-18, 24-25
Online virtual

November 5-8
In-person, Whistler

PRICING

\$2,250 + GST Online virtual

\$3,500 + GST In-person

Early bird discount for in-person offering:
\$300 off the regular price will apply if registration is completed at least two months prior to start date.

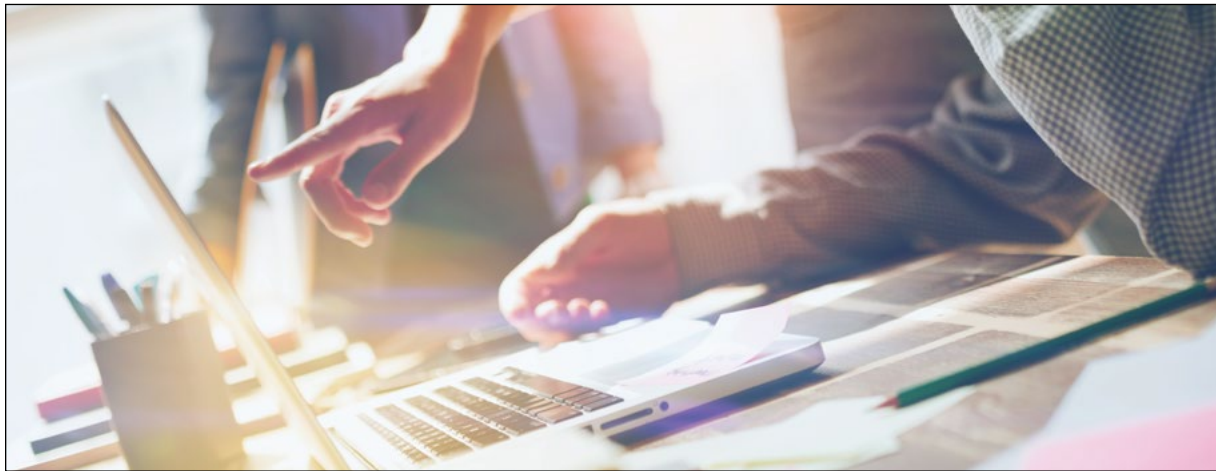
CPD: 28 hours
(includes 5 hours of pre-work)

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 the pandemic has not made things easier. Every CFO is hearing the new calling from the corporate boardroom to “step out and go beyond the box” and/or “launch our digitization journey.” Long gone are the days when the CFO was primarily focused on the traditional areas of command and control and 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 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

though metrics and dashboards? Do you want to digitize and 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 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
- Bringing value to the CxO table

Value and Wealth Creation — Measurement and Management

- Defining value and wealth creation
- 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

2023 DATES

September 13-16

In-person, Vancouver

PRICING

\$3,500 + GST In-person

Early bird discount for in-person offering:

\$300 off the regular price will apply if registration is completed at least two months prior to start date.

CPD: 26 hours

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 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 over 15 years. 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 unpredictable demands of an increasingly ambiguous, volatile, disruptive, complex business environment.

Once offered as an intensive four-day residential program, this one-of-a-kind learning experience is now available online for the benefit of a wider geographical audience. It remains highly interactive, relevant, provocative and challenging. It answers the critical questions every leader has today: Do I possess the emotional and mental qualities, interpersonal skills, street-smart insights, decision-making savvy and executive presence to lead? Can I handle the dynamic forces that will impact my business: changing stakeholder expectations, decaying business paradigms, archaic management practices, bad strategies, and the unanticipated but

formidable risks and “black swan” events largely beyond my control? Can I deal effectively with ethical dilemmas, manage those who are brighter than me, audit and design a smart and healthy organization, and decide when “the game” must be retooled?

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. This program has a singular objective – to give you a more powerful lens to define or refine your identity and to assess those who will build on your legacy. It’s not a philosophical discussion about what leadership is; it’s simply about how you can get better at leading others to greatness.

This executive program is the creation of Dr. Jim Murray who has been teaching members of the accounting profession for more than

40 years and has also been formally honoured at the university level for “excellence in the design and delivery of lifelong education.” He has successfully led large and small organizations in both the public and private sectors and has a remarkable track record of exemplary performance in enabling senior executives in more than 600 organizations to achieve their often 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. It is offered once a year – don’t miss your opportunity.

The CEO Program is revamped annually to include the latest research on executive concerns and challenges. It consists of seven three-hour sessions spread over three weeks, includes two pre-course workbooks and a 100+ page manual of supplemental readings, instructive cases to hone decision-making skills, and numerous diagnostic instruments. Networking opportunities are provided for those who want them and performance coaching is offered at no charge if desired. The depth, breadth and sharing of participant experiences is one of the primary benefits.

Curriculum

The Opportunity and Realities of CEOdom

- The premise, objectives, caveats and roles
- Critical skills and stylistic nuances of leadership
- Lesson #1: Avoid the fatal flaws or get the axe
- How to survive and thrive in the zone of complexity
- Finding, defining and shaping your leadership identity
- Leader styles vs. the competencies to deliver on them
- The difference between ‘the good’ and ‘the best’
- The C-suite skills that matter more than others today
- The gritty truths and diseases of being the top dog

The Challenges of Leadership in the C-suite Today

- The elusive, fragile, essential imperative of leading
- Smarts that separate leaders from the pretenders
- Achieving clarity, focus and results: The CEO Mantra
- Organizational DNA: Manipulating the critical genes
- Rethinking strategy: Realities and faulty assumptions
- If you’re new: What to do from day one to day 100
- Diagnosing the health and savvy of your enterprise
- The new post-COVID social contract with employees
- Assessing the key players on your executive team

The Elements of Extraordinary Leadership

- The CEO Entrance Exam: Questions you must answer
- Making good choices: Time, priority and energy audits
- Self-assessment: Do you have what it will take?
- Mapping your career advancement in broad strokes
- Setting your compass: The non-negotiable rules
- How to get the best advice and build reliable networks
- Executive presence, self-promotion and brand building
- Power and politics in the C-Suite: How to play the game
- Identity: Reconciling the five paradoxes of leadership
- Sustaining the drive: Fueling motivation and productivity

Overcoming Obstacles to Higher Performance

- Building a cohesive and focused executive team
- Measuring high performance at the executive level
- Inner circles, EAs or a CoS?: How to choose them
- Vision, purpose, values and rules: Misguided tools
- Operationalizing a paradigm shift in your culture
- Leading knowledge workers who are smarter than you
- Developing a symbiotic relationship with your board
- What the board needs to know and do about risk
- The relationship between structure and performance

The CEO as the Chief Decision Maker

- The three decision domains that make or break you
- The CEO effect: Why good leaders deserve their pay
- The bubble of ignorance: What, why and how to escape it
- The three fatal flaws that undermine decision effectiveness
- Improving decision outcomes: Eight tools and techniques
- Overcoming the echo chamber: Changing the D-M culture
- Finding the best experts: The traps you need to avoid
- Enriching the decision process: Knowing when you’re right
- Risk intelligence: Awareness, analysis, tolerance and framing
- Why successful companies fail: Might yours be next?
- Nurturing beneficial and credible two-way feedback

Continued on next page >

Curriculum CONTINUED

Fostering Innovation and Building Resilience

- Leading in a crisis: Dos, don'ts and prevention tactics
- From the trenches: Jim's crisis intervention playbook
- The lessons of COVID: What have leaders learned?
- Forecasting high-impact surprises, unknowns and luck
- The elements and architecture of a smart enterprise
- Fostering workforce innovation: Problems and solutions
- Execution: Ingredients, constraints and required skills
- Making innovation a competency rather than a slogan
- Why Canadian companies are so poor at innovation
- Intelligent failure: A paradigm for symbiotic growth
- Business model transformation: Different approaches
- Strategies for growing your business in a VUCA world
- Caveat emptor: Partnerships, strategic alliances and IPOs
- Due diligence: The upsides and the downsides of scaling

The Ultimate Responsibilities of Leadership

- Navigating ethical dilemmas: The tricky slippery slope
- Which CEOs are more likely to commit fraud?
- Embracing the highest calling of exemplary leadership
- High potentials: How to identify and develop them
- How and when to exit the enterprise stage left
- Succession planning: How to find your next CEO
- Overcoming the challenges internal candidates face
- 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 need to 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

2023 DATES

June 5-8, 20-22

Online virtual

PRICING

\$2,250 + GST Online virtual

CPD: 26 Hours

(includes 5 hours of pre-work)

Ethics Content: 1.5 hours

UNIQUE FEATURES INCLUDE

- Seven three-hour sessions 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.”

“Phenomenal instructor with a tremendous knowledge of the topic and variations on the application.”

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 and other business leaders anticipate, prepare for and quickly respond 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 risk, risk management, and 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 to use key risk management tools: Risk and control assessments, risk bow tie and key risk indicators.
- Apply the learnings, concepts, and tools to their organizations.
- Understand how risk integrates with strategic decisioning.

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

WHO SHOULD ATTEND

The program will be of great benefit to financial professionals with at least a few years of experience, who want to further their career and/or add more value to their organization. It is especially valuable for those financial professionals in organizations and industries where risk management is gaining critical importance.

The concepts and practices that will be presented can be applied to all sectors, organizations, and industries – e.g., the finance sector, the public sector, not-for-profits, and small and medium-sized business.

Curriculum

Introduction to Enterprise Risk Management

- Definitions - Risk and Enterprise Risk Management (ERM)
- ERM and corporate governance
- Benefits of ERM/difficulties with ERM
- Risk and cognitive biases
- The ERM Framework relative to ISO and COSO

Establish Context for Managing Risk

- Establishing the tone at the top
- Considering the external and internal environment
- Risk appetite and risk tolerance
- Risk taxonomy
- Roles and responsibilities – the three lines of defense model

Risk Identification and Risk Assessment

- Risk identification – approaches/techniques to identifying risk
- Risk prioritization – inherent risk and residual risk
- Risk measurement criteria – likelihood and severity, velocity and adaptability
- Risk heat maps

Risk Treatment/Response

- Risk avoidance/risk acceptance/risk transfer-sharing
- Risk mitigation with controls
- Corrective and recovery controls
- Risk registers
- Risk and control assessments
- Risk bow ties and risk bow tie methodology

Risk Monitoring and Risk Reporting

- Areas of priority for monitoring
- Key risk indicators
- Lagging and leading risk
- Risk reporting - who's the audience?
- Examples of best practice risk reports

Incorporating Strategic Decisions and Implementing ERM

- Change Management 101 and Risk Management
- Aligning strategic decisions with risk appetite – different perspectives
- Implementing ERM – tips and principles for success

FACULTY

Bill Wesioly, CPA, CMA

2023 DATES

November 20-22

Online virtual

PRICING

\$2,250 + GST Online virtual

CPD: 23 hours

(includes 0.5 hours of pre-work)

Ethics Content: 0.5 hours

Smart Leaders 2025: Thinking and Innovation Skills



OBJECTIVE

Organizations live or die on the ability of their leaders to think outside the box, become less risk averse and solve the big 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 perilous, unpredictable issues they confront almost daily. The testimonials from prior attendees are all you need to read to understand why this program can nurture the skills required to survive and thrive in an increasingly volatile, complex, disruptive business environment.

Thinking differently and more effectively is the key to success in everything you'll ever do. 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 most accountants have by virtue of

their calling, are especially vulnerable to the radically different challenges we face today. To lead in an uncertain, exponentially changing and error-prone world, we must strengthen our capabilities as risk-takers and innovators. As Steve Jobs once said, "innovation is what distinguishes a leader from a follower." We must be 'plugged into' the future and know how to reframe old-paradigm strategies into new-world breakthroughs.

We were taught how to be good analytical thinkers not creative problem solvers. This skill set is neither a gift nor a consequence of magical inspiration. It's simply the mindset of a smart leader. Knowledge confines you to what is; imagination – the brain's navigational system – opens you up to what could be. When you have a bigger and proven toolbox for reframing difficult challenges, you can find better answers. Extraordinary leaders are just ordinary people who are able to think differently

"... 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 instill a culture of innovation in my company."

"It opened my mind ... I was a captive of my analytical approach to solving problems."

under the pressure of evolving stakeholder expectations. Prior attendees have said unequivocally that this program changed how they lead. Because it changed how they think. It's offered once a year with a limited enrollment – don't be disappointed.

WHO SHOULD ATTEND

Leaders (or those who aspire to lead) who seek to liberate their genius and that of their workforce. The most significant competitive advantage you'll ever possess is the ability to think on all cylinders. "It's rare to find a CEO who doesn't want their organization to be more innovative, yet very few know how to achieve this vision" (The Harvard Business Review). The bottom line: innovative companies are led by innovative leaders. Are you? Your legacy lies not in what you know, but in what you do with what you think you know.

Curriculum

The Mind and Genius of a Smart Leader

- How thinking determines how you lead
- Overcoming the accountant's affliction
- VUCA: Old world vs. new world realities
- Linear vs. exponential growth & disruption
- The four things that will "rock your world"
- How artificial intelligence will impact you
- Analytics, intelligence, risk and leadership
- Five minds for the future: What matters
- Integrative thinking: The Smart Leader thesis

Thinking Styles: As We Think So We Become

- Perception: How the brain makes up its own reality
- The hard truths about creative & analytical thinkers
- Why we have such difficulty solving big problems
- Head vs. gut: Understanding our internal conflicts
- How & why we adopted a preferred thinking style
- Cognitive tendencies that lead to really bad decisions
- The tricks our brains play on us & the consequences
- Levels of leadership: You're not where you think
- The critical biases that take us down the wrong path

Overcoming the Constraints to Creative Thinking

- What separates the creatives from the non-creatives
- Getting "beyond the box" – the biggest impediment
- Our self-imposed limitations: Small-cage thinking
- The neurobiology of fear and how to overcome it
- Neurology 101: Understanding the brain's hardware
- Our navigation system: Cultivating imagination & insight
- Intelligences: The eight that every leader must acquire
- Intuition: The source code of brilliant business decisions
- Training the brain: How to speak to it & make it listen

Fostering Workforce Resilience and Innovation

- Why Canadian companies are especially bad at it
- Judgement: An idea killer or an idea generator?
- Why innovation is over-hyped and misunderstood
- Rooting out dogma, groupthink & culture antibodies
- Why success contains the seeds of its destruction
- Auditing innovation DNA & overcoming paradoxes
- Building & managing an open & adaptive culture
- The six steps of innovation: From origin to execution
- How to design, develop & evaluate a business proposal
- The art & magic of the pitch: How to sell "any" idea

Thinking Tools and Problem-solving Techniques

- Why do we need tools to find brilliant new ideas?
- A simple, effective, better way to solve any problem
- The upsides & downsides of group problem solving
- Eight group techniques: From easy to the difficult
- Life hacks: Nine simple ways to find great ideas
- One dozen (plus) structured individual ideation tools
- A quick pathway for analyticals to become creative

Protecting and Liberating the Power of Your Genius

- Brain health: Five ways to prevent cognitive decline
- Aging & dementia: Will you have enough in the tank?
- Brain fitness: How exercise & play shapes the brain
- Longevity: Cognitive reserve and Alzheimer's Disease
- Why top performers invest in their personal growth
- The nine steps to mapping your future as a leader
- What genius really means & how to re-awaken yours
- What smart leaders know that others don't understand

FACULTY

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

2023 DATES

November 7-9, 21-23

Online virtual

PRICING

\$2,250 + GST Online virtual

CPD: 24 hours

(includes 6 hours of pre-work)

UNIQUE FEATURES INCLUDE

- Six three-hour sessions over three weeks
- Two pre-course workbooks and an instructional manual of supplemental notes
- Optional networking sessions
- Executive-performance coaching opportunities for those who may be interested

The instructor is receptive to and encouraging of attendees adding their own topics of interest to the above program outline. Additional subjects are covered in a 100+ page manual of supplemental notes and also arise from time to time in questions posed by participants.

The Optimal Negotiator: The Definitive Program for Serious Deal Makers



“The program is highly interactive and life changing.”

“...Jim made this program really interesting and gave us a lot of examples of how to gain an upper hand in situations that are not in favour of your side.”

“Opened my eyes to my weaknesses and reminded me that everything is negotiable.”

OBJECTIVE

The one skill leaders must master is the ability to get others to agree with them. In any undertaking of significance, whether personal or professional, knowing how to encourage adversaries to accept your point of view while seeing themselves as winners is crucial to your success and the prosperity of the enterprise you lead. You'll never ascend the corporate ladder without a solid understanding of negotiating principles and advanced nuances.

Negotiating is a delicate mix of art and science, of style and substance. It prizes intuition as highly as intellect, common sense as much as the hard numbers. It requires emotional detachment, a knowledge of the critical importance of process and a high aspiration level. Many understand “how to” do it intellectually but few are entirely confident in their ability to consistently optimize deals. It's a game of

power, real as well as imagined. While some play the game masterfully, others only dimly understand it. Which are you? And are you ready to find out?

This comprehensive, highly interactive advanced program is the creation of Dr. Jim Murray who has been researching, teaching and practicing this time-honored craft for more than five decades. Tens of thousands from all walks of life and professional callings have benefitted from his street-savvy insights, acclaimed expertise and personal experiences in virtually every conceivable negotiating arena.

His accomplishments run the gamut from collective bargaining to corporate acquisitions and international diplomacy, from training hostage negotiators and

mediators to mentoring CEOs, from counseling big-league sports organizations to advising parents on dealing with troublesome teens. He's authored three best-selling books on negotiating and has been nationally honoured at the university level for “innovation and excellence in the design and delivery of lifelong learning.” The program has a limited enrollment – don't miss your opportunity.

WHO SHOULD ATTEND

The target audience are those who are dead serious about building their skills beyond mere competence. You'll confront questions about the process you've never thought about before – yet they're ones every negotiator must know how to answer. Otherwise, you'll lose more often than you win. If you aspire to mastery, this executive program was designed with YOU in mind.

The 2023 Curriculum

The Framework

- Dissecting the puzzle
- Negotiating facts and fictions
- Why we think we negotiate and why we actually do
- Ethics and choices
- Content vs. process
- Core negotiator needs
- Making losers feel like winners
- What drives acceptable numbers
- Information disguise and discovery
- Deciphering “last and final” offers

Tactic Recognition

- The glossary of negotiating tactics
- A spectrum of styles
- Classic win/lose maneuvers
- Reasonable vs. realistic openings
- How to make the numbers convincing
- Bargaining posture
- Aspiration level
- Countering unreasonable demands
- Recognizing emotional ploys
- Anatomy of tactics
- Advice on selection and response
- Counterintuitive negotiating
- When win/lose works
- Dealing with aggressive, pathologically difficult adversaries
- Creating opponents of choice

The Process

- Stages, key ingredients and important rituals
- The #1 error
- Inventory of preparation tools
- Social amenities and agenda setting
- Questions people never think to ask
- How to open: Phrasing, priming and anchoring
- What to say when you don’t know what to say
- Difficult openings
- Achieving alignment
- Presenting proposals for impact
- How to package
- When to deadlock and how to break impasse
- Closing: The how and when

Cross-cultural Differences

- Gender strengths, weaknesses and tendencies
- Typecasting ethnic and cultural differences
- Building negotiator profiles
- Tactical insights on negotiating globally: Dos and don’ts
- Weaknesses of Canadian negotiators
- Translating major personality types into tactical advantage

Communication Skills

- The 90:10 principles
- Acquiring sensitive information
- How to induce desired responses
- How to “listen harder”
- Translation, mirroring and hypnosis
- Reflection and deflection
- Deciphering hidden meanings
- Understanding non-verbal cues
- Negotiating online

- Lie detection
- Alternatives to lying
- Interrogation techniques
- Disagreement without escalation
- Persuading and selling
- Altering your communication ratios

Principles of Timing

- Why people say NO and what it really means
- When to ask for what you do want
- Distinguishing event from process
- Dealing with 11th hour and deadlines
- Handling resistance and objections
- Artful phrasing when time matters
- How to say NO when you have no alternative

Human Behaviour

- Price vs. value
- Applications of neurobiology
- Getting others to do your bidding
- Interaction cycles
- Establishing rapport through NLP
- Perceptual barriers: Masking, ego defense and role playing
- Negotiator biases
- Self-control and conflict reduction
- Reading the signals of escalating conflict
- Engineering a climate conducive to achieving your objectives

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The 2023 Curriculum CONTINUED

Power and Leverage

- Myths and fallacies
- Rational presence and psychological influence
- Evaluating the power equation
- Dealing with overwhelming power
- Diagnosing the power of others
- How people give up the power they have
- The downsides of power as a style
- The art of compromise
- Negotiating win/win with powerless adversaries
- How to increase your power and when to decrease it
- The power of legitimacy
- Hard vs. soft power

Inventive Negotiating

- How to change the shape of any deal
- Leveraging the terms as buyer or seller
- Loss aversion and reducing buyer remorse
- Negotiating the future
- Breaking impasse
- Dealing with job offers to get more
- Creative tactical responses
- Making seemingly impossible deals
- What to say when you get the job
- Beyond creativity

Team Negotiating

- When to use a team: Strengths, limitations and caveats
- How to build and manage a team
- Determining the optimal team size, essential roles and responsibilities
- Intra-group bargaining caveats
- Tracking progress at the table

From Negotiator to Mediator

- To mediate or not?
- Values vs. behavioural conflicts
- Primary barriers
- Mediating issues vs. beliefs
- Antidotes
- The role, attributes and objectives of high-level mediations
- Essential elements for success
- The process simplified
- Dimensions of conflict
- The three levels of mediator tactics
- Bad assumptions

Achieving Mastery

- Theory vs. reality
- When NOT to negotiate
- Essentials of good strategy
- Things you never do
- The one skill required to succeed
- Critical attributes, proficiencies and thinking skills
- Why negotiators fail
- The conceptual framework summarized
- Final exam: The 25 critical questions you need to answer
- Where to from here?

FACULTY

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

2023 DATES

Mar 7-9, 21-23 (3 hours each day)

Online virtual

PRICING

\$2,000 + GST Online virtual

CPD: 23 Hours

(includes 5 hours of pre-work)

UNIQUE FEATURES INCLUDE

- Six three-hour sessions over three weeks
- Two pre-course workbooks of readings and diagnostic tasks
- Opportunities to solve your most troublesome problems



CPABC

Executive Programs

CPABC PROFESSIONAL DEVELOPMENT

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