



## CPA ALBERTA EXECUTIVE PROGRAMS

Moving you and your organization forward



## Executive Programs

Executive programs are multi-day, interactive, in-depth, and in-residence programs. The format is designed to increase the scope and depth 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 offerings include programs tailored specifically for current or aspiring controllers, CFOs, CEOs, and professionals seeking to improve business performance through innovation and technology.

Sign up for the CPA Alberta Executive Programs to move you and your organization forward.

### CEO Program

“Provided me with gems of insight – I tried to absorb every wisdom Jim imparted. A transformative experience. Every second of my life is worthy of my time and energy. I enjoyed it immensely.”

“It forced me to write down my moral compass, take stock of a realistic self-assessment, and answer some really tough questions. I now have a binder full of resource materials.”

### Controller’s Management Program

“The group discussions and networking for a huge success. I felt like a lot of us left feeling really excited about the new skills we learned and the new connections we made. I really feel like I will keep in touch with a lot of the people I met and I have already put into action some of the things I learned. I feel like this was the most valuable PD course I have taken yet.”

### Controller’s Operational Skills Program

“As a CPA who is not in a traditional Controller-type role, I found this program to be a great refresher in covering a vast array of accounting and operational related topics. It allowed me to reinforce what I am doing right and also expand my horizon with other approaches through the content presented and networking connections established.”

### CFO’s Leadership Program

“The CFO Executive Program was an intense session of learning and networking. Not only did we learn about our professional roles but as individuals and how we are motivated, I think we all left the session feeling better about our capabilities and our futures.”

“The blend of the Operational and Leadership course is a fantastic program to help clarify the role of the CFO. A wide range of topics covered and some very real tools to help any aspiring and refresh even the seasoned professional. I wish I would have done this 10 years ago, it would have given me the perspective needed to reduce my stress load.”

### CFO’s Operational Skills Program

“I attended the CFO operational skills course in November 2019. The course content was relevant to day-to-day jobs of CFO’s and Aspiring CFO’s. Jeffrey Sherman was a knowledgeable facilitator who was engaging and made the team activities relevant and fun. Course was held at Rimrock resort in Banff and it was a wonderful property with excellent accommodation and meals. Great networking opportunity to meet other CFO’s and learn from each other. I would highly recommend this course.”

EMAIL [pdregistration@cpaalberta.ca](mailto:pdregistration@cpaalberta.ca)

WEB [cpaalberta.ca/Professional-Development](http://cpaalberta.ca/Professional-Development)

TEL 1.800.232.9406

Discover how you can move you and your organization forward

## Our Current Programs

CEO PROGRAM	CONTROLLER'S EXECUTIVE PROGRAM	CFO'S EXECUTIVE PROGRAMS
Curated the current and aspiring leaders.	A two-component curriculum designed to provide current and aspiring controllers with the foundation for success.	A two-component curriculum designed to provide current and aspiring CFO's with the foundation for success.
The CEO Program is a practical, intensive, provocative, highly interactive, advanced program for current and aspiring leaders seeking to excel in the upper echelons of executive responsibility.	The Controller's Management Program focuses on honing your personal and interpersonal effectiveness.	The CFO's Leadership Program focuses on developing the skills of an influential leader in your organization.
	The Controller's Operational Skills Program focuses on the core technical processes and procedures of the financial role.	The CFO's Operational Skills Program focuses on the strategic technical competencies of the role.
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## CPA Alberta PD Executive Program Faculty

All of our faculty members are experienced educators with years of practical experience in business, management, and leadership.



LINDA LUCAS CPA, CMA provides CEO, COO and CFO services to small- and medium-sized companies. She specializes in helping C-level executives and business owners identify and execute their strategic objectives, build strong teams and achieve operational excellence.

A CPA, CMA, she draws on over 20 years' experience in strategic, operational and financial management in transportation, banking and professional services. After six years in the Caribbean and Europe, Linda returned to Vancouver, becoming the National Director of Finance for one of Canada's largest law firms. In 2013, she became Chief Operating Officer of KNV LLP, BC's eighth largest accounting firm, where she increased net profit by 30% within two years and helped navigate the firm's successful merger with MNP LLP.

Most recently, Linda served as CEO of one of Canada's most recognized boutique law firms, where she successfully created and implemented the firm's three-year strategic plan while also providing oversight for all operational aspects of the firm. Within 30 months, average net income per equity partner increased by 52%.

Linda 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. Mia has over 20 years of teaching experience.

Since 1986, she has worked in finance and accounting 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 has worked for both private and public companies, has participated in raising over \$50 million in funds, and has experience in international initiatives.

Mia facilitates the Controller's Operational Skills Program

## CPA Alberta PD Executive Program Faculty

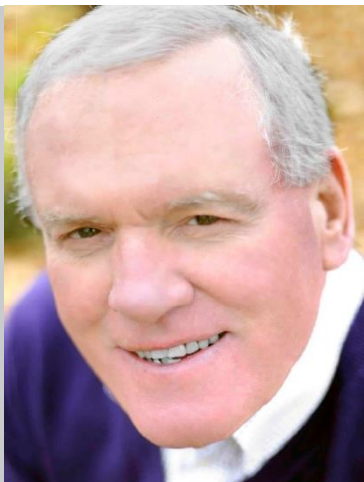
All of our faculty members are experienced educators with years of practical experience in business, management, and leadership.



LESLEY-ANN MARRIOTT PCC, CEC holds the advanced credential of Professional Executive Coach. As a former executive, she developed her skills in the competitive world of the big box retail business at the senior leadership table. She has invested thousands of hours coaching senior leaders and teams, many of whom are professional accountants.

Described as “edgy and fun”, her sessions are highly interactive and entertaining. Lesley-Ann is Principal at Marriott Management Group, Associate Faculty at Royal Roads University – Executive Coaching Program, Faculty for CPA’s Executive Leadership Program and Senior Associate of Personal Strengths Canada – Core Strengths.

Lesley facilitates the CFO’s Leadership Program and the Controller’s Management 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”. His full biography describing his eclectic career and many accomplishments can be accessed through his website at [SmartLeaders.ca](http://SmartLeaders.ca).

Jim facilitates the CEO Program



# CPA Alberta PD Executive Program Faculty

All of our faculty members are experienced educators with years of practical experience in business, management, and leadership.



JEFFERY D. SHERMAN MBA, CIM, FCPA, FCA is CEO of Terragram Investments Ltd. and has over 25 years' experience as a corporate director and executive in real estate, high tech, biotechnology/medical, financial services, and business services. From 2012 to 2017, he was CFO of Atrium Mortgage Investment Corporation (TSX: AI) where he helped take the company public and grow its assets from \$180 million to over \$600 million.

Mr. Sherman is a popular presenter, and a frequent course director and course author for many organizations including provincial associations of chartered professional accountants across Canada and has written many magazine articles and over twenty books including: Canadian Cash and Treasury Management, and Financial Instruments: A Guide for Financial Managers (published by Thomson-Reuters/Carswell), as well as Finance and Accounting PolicyPro (guide to governance, procedures, and internal control), and Strategy and Planning Toolkit for Small and Medium Businesses (all published or co-published by CPA Canada). Mr. Sherman has a BComm from Rotman Commerce (University of Toronto) and an M.B.A. from the Schulich School of Business and is an FCPA, FCA (Ontario.)

Jeffery facilitates the CFO's Operational Skills



TAMMY TOWILL MBA, FCPA, FCMA is a partner in the Cordura Group and faculty with 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

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

## OBJECTIVE

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

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

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

## WHO SHOULD ATTEND

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

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

## FACULTY

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

## PRICING AND DATES

For current pricing and scheduling information please visit our website by [clicking here](#).

CPD Hours: 26 Hours

# Curriculum

## CPA ALBERTA

### CEO PROGRAM CERTIFICATE

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

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

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

#### Opportunities and Realities of CEOdom

- Reasons why CEO's get the axe
- Defining your unique leadership ID
- The uncomfortable truths and gritty reality

#### The Challenges of Leadership

- What separates leaders from pretenders
- Achieving CEO and organizational clarity
- Develop strategic intelligence

#### The Ingredients of Leadership

- Determinants of your leadership potential
- Setting your compass: non-negotiable rules
- Realistic self-assessment

#### Perfecting the Critical Skills

- Identifying the right people for your team
- Vision and values: misused tools
- Leading people smarter than you

#### Building Organizational Resilience

- Forecasting high-impact surprises
- Foster a culture of innovation
- Business model transformation

#### The CEO as Chief Decision Maker

- How to avoid the inevitable bad decisions
- Echo chamber and the CEO's Achilles' heel
- Dealing with experts: the errors and traps

#### The Ultimate Responsibilities

- Navigating the tricky slippery slope
- Knowing and embracing the highest calling
- Succession planning: finding the next CEO





# The Controller's Management Program

## OBJECTIVE

As a Controller, you provide financial expertise in your organization, and 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. Communication for a variety of contexts

This highly interactive program will provide you with a unique experience and many opportunities for you to network and learn from your peers. Through case studies, group discussions, exercises and role-plays that are representative of situations faced by controllers and financial managers, you will gain skills and confidence to increase both your personal and interpersonal effectiveness. Over the course of three-plus days you will gain critical insights into leading practices in management and leadership and have the opportunity to apply tools and skills to your work context, share experiences with your peers and take away actionable goals.

## WHO SHOULD ATTEND

This course is for you if you are;

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

## FACULTY

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

## PRICING AND DATES

For current pricing and scheduling information please visit our website by [clicking here](#).

CPD Hours: 29 Hours

# Curriculum

## CPA ALBERTA CONTROLLER'S EXECUTIVE PROGRAM CERTIFICATE

The CPA Alberta Controller's Executive Program is a two-component program designed to provide you with the foundation for success.

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

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

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

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

### Controller as Leader

- Understand your leadership style
- Know what motivates you in all situations
- Understand different personality profiles
- Adapt your approach and leadership

### Supervisory Skills

- Provide effective and timely feedback
- Build listening and emotional intelligence
- Become aware of unconscious bias
- Learn core coaching skills for managing

### Team Dynamic

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

### Presentation & Communication Skills

- Develop effective presentations
- Use conflict to build relationships
- Be comfortable with difficult conversations
- Adapt your message and delivery for specific audiences and situations

### Conflict & Change Management

- Learn how to identify the causes of conflict
- Understand conflict behaviours
- Learn how to respond to conflict
- Appreciate why change can be a source of conflict and how to overcome resistance to change



# The Controller's Operational Skills Program

## OBJECTIVE

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

The Controller's Operational Skills Program is designed to enhance your role on the management team by sharpening your skills in risk management and controls, ethical leadership, planning, budgeting and forecasting, performance measurement approaches and financial reporting. You will explore ways to maximize the effectiveness of your accounting department through staffing and structure, policies and procedures, and process and quality management.

You will gain insights into performance enablers for success, with a focus on information management and human resources management, and an eye towards trends in 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.

## FACULTY

Mia Maki BA, MBA, FCPA, FCMA

## PRICING AND DATES

For current pricing and scheduling information please visit our website by [clicking here](#).

CPD Hours: 25 Hours

# Curriculum

## CPA ALBERTA CONTROLLER'S EXECUTIVE PROGRAM CERTIFICATE

The CPA Alberta Controller's Executive Program is a two-component program designed to provide you with the foundation for success.

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

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

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

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

### The Controller's Role

- Framework for effective controllership
- Planning, budgeting and forecasting
- Performance monitoring and reporting
- Financial standards and statutory reporting
- Risk identification, management and controls

### Performance Enablers and the Way Forward

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

### Running an Effective Accounting Department

- Purchasing and payables
- Credit, billing, and collections
- Inventory planning and management
- Cash planning and management

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

# The CFO's Leadership Program

## OBJECTIVE

The role of the Chief Financial Officer continues to evolve. Beyond technical expertise, today's CFOs need to make strategic financial decisions in a changing dynamic environment. This necessitates inspired, authentic leaders capable of solving challenging problems as a valued member of the C-suite.

From supporting strategic decision making through to strong financial stewardship, there is a need for the CFO to demonstrate expertise in a broad range of areas, including regulation, 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 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 culture and change
- Leading & influencing across all stakeholders

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

## WHO SHOULD ATTEND

This course is for you if you;

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

## FACULTY

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

## PRICING AND DATES

For current pricing and scheduling information please visit our website by [clicking here](#).

CPD Hours: 29 Hours

## Special Program Features

Leadership assessments will be done prior to the program.

- 360° Leadership and Organizational Assessment
- 360° Assessment of Strengths in the Role of CFO

One-on-one session with a professional Executive Coach provided on-site



# Curriculum

## CPA ALBERTA CFO's EXECUTIVE PROGRAM CERTIFICATE

The CPA Alberta CFO's Executive Program is a two-component program designed to increase your scope and depth of learning.

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

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

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

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

### How to be a Strategist

- Execute better by being a better strategist
- Shift from operational to the strategic phase
- Understand how CFO's impacts development
- Discuss the techniques to drive change
- Explore the gap between corporate strategic goals and the day to day operations

### Communicating and The Art of Persuasion

- Learn the latest techniques for presenting
- Explore current impacts on communications
- Drive outcomes through presentations
- Receive feedback on live presentations that will enhance your specific style

### Leading and Influencing

- Develop a more effective leadership style
- Learn how to give and receive 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

- Manage your personal well-being
- Best practices for managing daily tasks
- Build 'executive presence'
- Learn how to position yourself to have the greatest strategic impact both currently and in the future

### Negotiations

- Enhance your ability to negotiate
- Approaches to negotiations for success
- Understand your negotiation style and its impact



# The CFO's Operational Skills Program

## OBJECTIVE

Reporting to the CEO or President, the Chief Financial Officer is the top job that leads, initiates, and manages the financial decision-making process within the organization.

In addition to being a senior advisor to the CEO and the Board, the CFO has other roles: business partner, scorekeeper, commentator, expert and custodian. These multiple functions mean that the CFO has to see both the forest and the trees, needs to understand the business and its numbers, as well as lead, develop and help execute the business strategy.

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

Nail down the strategy, planning, budgeting and internal control competencies to facilitate efficient and effective operations. Learn how to effectively communicate metrics and operating results for internal and external stakeholders. The residential format with group workshops lets you readily network and learn from your peers.

## WHO SHOULD ATTEND

Do you currently direct, or wish to direct the finance and administration areas of your organization? Do the CEO and the board look to you for counsel and guidance? Are you trying to improve governance, accountability and the control environment? Would you like to examine the state-of-the-art developments in strategy, risk management and financial reporting?

If so, then this program was created with you in mind.

## FACULTY

Jeffrey D. Sherman MBA, CIM, FCPA, FCA

## PRICING AND DATES

For current pricing and scheduling information please visit our website by [clicking here](#).

CPD Hours: 28 Hours

## The CFO's Operational Skills Program

# Curriculum

### CPA ALBERTA CFO's EXECUTIVE PROGRAM CERTIFICATE

The CPA Alberta CFO's Executive Program is a two-component program designed to increase your scope and depth of learning.

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

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

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

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

#### Governance, Strategy, and Risk Management

- Stakeholders, shareholders, and the board
- Culture, ethics and wisdom
- Role of the CFO
- Behavioural finance and insights
- Integrating governance and strategy
- COSO's Enterprise Risk Management

#### Creating Value Through Financial Management

- Disruption and risk in the 21<sup>st</sup> century
- Operational and financial tools
- Internal controls and COSO's internal control
- New approaches to financial reporting
- Treasury, capital markets and financial instruments

#### Corporate Finance

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

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

