

LEADING TEAMS

PROGRAM GUIDE



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ABOUT KNOWLEDGE BUREAU

Knowledge Bureau™ is Canada's leading national post-secondary educational institute for continuing professional development in the tax and financial services. It is focused on providing knowledge and skills required to navigate a rapidly changing environment in the tax and financial services.

Founded in 2003 by bestselling tax author and internationally acclaimed educational entrepreneur, *Evelyn Jacks*, Knowledge Bureau publishes and delivers close to 30 online certificate courses leading to continuing education certification and occupational skills diplomas. It is the home of the *MFA™ (Master Financial Advisor)* designation, which signifies specialization in retirement, business, and succession/estate planning in wealth advisory practices, as well as the *DFA-Tax Services Specialist™* and *DFA-Bookkeeping Services Specialist™* designations for professionals in the tax accounting services.

Knowledge Bureau hosts regional workshops and in-class events in major centres across Canada, taught by industry leaders in a blended learning opportunity with its online courses, and an annual international event, the *Distinguished Advisor Conference™*, which explores strategic wealth management for retirement in locales clients retire to. It also partners with corporate clients and academic institutions, custom-designing CE modules, webinars, and keynotes to meet organizational needs. Finally, Knowledge Bureau is a national publisher of *Knowledge Bureau Newsbooks*, which provide opportunities for Canadians and their advisors to make better financial decisions together through highly interactive news information and educational experiences.

For more information contact Knowledge Bureau at 1-866-953-4769 or visit www.knowledgebureau.com.

**CONGRATULATIONS ON YOUR INITIATIVE TO EXPLORE YOUR INTEREST IN A
NEW FINANCIAL EDUCATION**



A MESSAGE FROM EVELYN JACKS, PRESIDENT

I am delighted to welcome you to Knowledge Bureau! We are excited to help you get started on a world class educational experience to maximize your learning opportunities. We are completely committed to your ongoing success in your professional development and strive to exceed your expectations, because we want to be your educational home.

Here at Knowledge Bureau, we are proud to offer you a comprehensive, true-to-life learning experience so you can graduate from your program selections with the knowledge, skills and confidence to provide outstanding solutions to clients in your chosen field of studies.

We do so by connecting you with cutting edge resources, expert instructors and peer-to-peer networking opportunities that will be thought-provoking. We know you will get better results, simplify efforts and help clients achieve peace of mind in making financial decisions in a complex world. It's so simple to get started; in fact, you can do so today if you wish.

Ready to Enrol? Visit the [Virtual Registrar](#) to enrol yourself conveniently online, anytime. Or, start with a free trial.

Need More Information? Do a Campus Orientation. Schedule a 15-minute orientation call at your convenience today. We'll walk you through the Virtual Campus, help you get started in identifying all your course components, and show you how to access instructor support. Be sure to take advantage of this free service: contact us at 1-866-953-4769 or by email registrar@knowledgebureau.com

Learn More Now: This **Program Guide** features details about the Faculty you are interested in. Please take a moment to consider all of the courses in the program. Following that is a detailed course overview and lesson plans for the course you have shown interest in and the individual course you have selected to get started. Finally, there is an application form you can scan and email directly to us.

Best of Luck with Your Studies!

Sincerely, Evelyn Jacks, President, Knowledge Bureau

MFA™ - BUSINESS GROWTH PROGRAM



ESPECIALLY FOR:

- Business Owners
- Entrepreneurs
- Accounting and Tax Practitioners
- Business Consultants

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Focus: Sales Leaders and Owner-Managers

This is executive education especially designed for small to medium sized enterprises poised to grow in a new economy.

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Help business leaders create and implement strategies, processes and plans that develop and enable business growth. Or take advantage of this educational opportunity to scale up your own enterprise to its greatest potential. Earn your **MFA™ - Business Growth Designation**.

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| > EverGreen Explanatory Notes
- Online Research Library | |



**"I vow to continually get better.
This topic is near and dear to me.
If I know ... I can share."**

- Paul J. Vaneyk
Executive Business Growth
Specialist, Undergraduate

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MFA™- BUSINESS GROWTH SPECIALIST PROGRAM

LEVEL I COURSES - CORE PROFESSIONAL SKILLS

Build your core professional skills by taking the three courses below.

Learn how to nurture micro businesses with strategic planning and the operational foundations to engage both new employees and new clients, while you help owner-managers transform into powerful leaders.

1

Leading Teams

When a business grows beyond the work of a sole-owner-manager, it's important to build a team and a great team culture for getting results. That means leadership methods and styles must change to the benefit of all the stakeholders to growth of the business. This course will help you understand what is required to build your skills and to be prepared for continuous change as your business evolves towards expansion and maturity.

Knowledge Journal Topics:

- Scaling Up
- Your Leadership Career
- Your Vision and Goals
- Building a Sustainable Business Model
- Branding
- Building Team Culture
- Critical Accountabilities
- Making the Right Investments
- Making Technology Work for You
- Your Succession Plan

2

Building Business Plans

Planning for income, profit and long-term sustainable growth requires a strategic approach to business planning. Learn more about how to structure and plan for the financial results you need to grow a market-driven business someone will eventually buy.

Knowledge Journal Topics:

- Business Planning Landscape
- Business Modelling
- What is Your Market Opportunity?
- Who Is Your Customer?
- Products and Services
- How to Get and Keep Customers
- Management and the Company
- Operations: Production and Support
- Financial Forecasting and Assumptions
- Approaching Financial Partners

3

Scaling Business Operations

Business leaders recognize that client relationships are integral to long term success, but this can only be achieved with the support of the right management and operational environment. The focus of this course is on establishing and enhancing a company's operational framework around which client relationships can be built and retained.

Knowledge Journal Topics:

- Differing Perspectives
- Business Leader's Vantage Point
- Organizational Structure
- Policies, Procedures and Systems
- Finance and Administration Functions
- Sales and Marketing Functions
- Human Resources Function
- Building Products and Services
- Developing an Action Plan
- Implementation

"In today's ever changing business world, all businesses (large or small) need to continue to grow and scale up in order to keep pace with their clients' needs and retain top talent. Knowledge Bureau's Executive Business Builder Courses can help you achieve the success you are looking for. They provide a straightforward road-map to help leaders (and aspiring leaders) cover all the bases required to move their business forward"

-- Joanne Sigurdson, Author, Leading Teams

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MFA™- BUSINESS GROWTH SPECIALIST PROGRAM

LEVEL II COURSES - MASTERY AND SPECIALIZATION

Complete your designation with specialized skills and deep professional knowledge by taking the three courses below:

Any firm that has an attractive valuation transcends dependence on its founder. Businesses with strong positions in the marketplace - now and in the future - have strong foundations and deliberate strategies for growth in both income and equity. Learn the underlying skills needed.

4

Understanding Employment and Contract Law

Every company requires the interaction with legal talent to develop contracts with the various stakeholders it interacts with. The course provides the background information business owners need to understand basic contractual agreements and templates for engagements

Knowledge Journal Topics:

- Introduction to Contracts
- Leases
- Real Estate Purchases and Sales
- Employment Contracts: Hiring
- Employment Contracts: Terminations
- Incorporation
- Business and Succession
- CASL and DNCL
- Intellectual Property
- Privacy Laws

5

Building and Communicating Your Brand

The old ways of marketing no longer work and competition is fierce. This course focuses on the things that can be done immediately, without huge investment, to navigate these new marketing opportunities and make a market within a community with a compelling value proposition.

Knowledge Journal Topics:

- Principles of Entrepreneur Marketing
- Positioning Your Company for the Future
- Five-Step Marketing Plan
- Psychology of Marketing
- Packaging Your Big Idea
- Introduction to Branding
- Plotting Your Marketing Process
- Advanced Marketing Concepts
- Putting it All Together

6

Team Structure: Recruit, Motivate, Retain

Never has working with people been more important. One can have the best ideas coming from the most talented leaders, the most innovative work structures, and the most accurate forecasts and business plans, but without expert execution by the entire team, the company will not get the results it wants. This course will challenge you to consider your specific role in change management - one which will allow you to take your own personal

Knowledge Journal Topics:

- You, The Leader
- The Team Structure
- The Plan
- The People
- Taking Time for Next Assessment and Evaluation
- Preventing and Addressing Performance Gaps
- Value and Investment Transactions
- Managing Top Performers Most Effectively
- Connecting Your Team to the Big Picture

Study online in the safety and convenience of your own home or office.
Your study plan is flexible and self-paced. Assume 30 hours for each course.
Take up to 3 months to complete one.

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- Continuing education credits from most professional bodies and regulators



About Knowledge Bureau:

Founded by tax expert, award-winning financial educator and best-selling author, Evelyn Jacks in 2003, Knowledge Bureau™ is a widely respected financial education institute and publisher based in Canada. Our world-class education solutions are innovative, informative, and in-depth, with a multi-disciplinary approach to professional development in the tax, accounting, bookkeeping and financial services.

Join Thousands Who Have Earned New Credentials

Over 850,000 Online course module registrations
Over 21,500 Technical training certificates issued
Over 17,000 Knowledge Bureau Report (KBR) subscribers
Over 10,400 Active students in certificate and designation programs
Over 12,700 CE Summits & Distinguished Advisor Conference attendees

"Our team of educational consultants and instructors make all the difference. We are always by your side as you study in the convenience of home or office. We want you to make the best educational decisions for your time and money and we are here to help."

- Evelyn Jacks, President of Knowledge Bureau

"Everything so far has had value to it. These studies have added to my knowledge and skills and I have put this knowledge to use immediately for our clients or I gained new skills which has given me the opportunity to expand our services."

- William S., ON

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LEADING TEAMS

OVERVIEW
When a business grows beyond the work of a sole-owner-manager, or a small shop of one to four people, it's important to build a team and a great team culture for getting results. That means leadership methods and styles must change to the benefit of all the stakeholders to growth of the business.
APPROACH
<p>Leadership is critical to the success and sustainability of an organization, but many business owners take it for granted and often ignore the skills necessary to become an effective leader of a growing organization. Moving from a core team of one to four people to the next level of five to fifteen can be challenging when it comes to knowing what it takes to build a culture, a team, and how to invest in the people who work with you to create an effective organization.</p> <p>This course will help you understand what is required to build your leadership and organizational skills and to be prepared for continuous change as your business evolves towards expansion and maturity. It will also help you understand that successful leadership does not stop with you; building and coaching a team, as well as a new generation of owners, is critical to growing the equity in your company over time.</p>
WHY IS THIS CONTENT ESPECIALLY TIMELY AND/OR IMPORTANT?
The purpose of this course is to understand how to develop and grow your own leadership skills, build the culture that is required to achieve your vision and business goals, and ensure continuity of your organization by developing an effective team around you. It will also help you understand what is required to ensure the continuous improvement and continuity of your organizational structure and working relationships that will position you for on-going growth, stability, and equity development within your enterprise.
WHAT YOU WILL LEARN?
<p>You'll discover how leadership is a developmental process, what a leaders' role in developing an organization and building an active culture, how to translate an organization's vision and goals into a useful structure, and what core leadership qualities are required to take a business to the next level</p> <p>Aspects of corporate culture that are covered include building a brand that reflects an organization's culture and how to represent it in the marketplace, how to integrate vision and culture statements into team building and coaching, and when to invest in training, human resource development and technology to stay ahead of demand. From a continuity standpoint, you'll discover how to construct a sustainable business model at the next level, and onward to maturity, and how to build equity with a sustainable organization that can live on without you.</p>
SCOPE OF THE CONTENT:
<p>Chapter 1 Scaling Up</p> <p>Chapter 2 Your Leadership Career</p> <p>Chapter 3 Your Vision and Goals</p> <p>Chapter 4 Building a Sustainable Business Model</p> <p>Chapter 5 Branding</p> <p>Chapter 6 Building Team Culture</p>

Chapter 7 | Critical Accountabilities
Chapter 8 | Making the Right Investments
Chapter 9 | Making Technology Work for You
Chapter 10 | Your Succession Plan

CHAPTER 1

SCALING UP

KEY CONCEPTS AND ISSUES - WHAT YOU WILL LEARN:

In this chapter, the student will be introduced to the concept of “scaling up” and taking a business to its full growth potential. The student will learn about the core leadership principles necessary to grow a successful business, how to recognize business life cycles and how to overcome the barriers to growth through the effective deployment of business strategy, process and the engagement of people.

NEW SKILLS TO BE MASTERED:

- Understanding business growth cycles and recognizing where your business is today
- Recognizing the leadership skills that you will require to lead your organization through the scaling up period
- Core principles of successful business leadership
- What road-blocks and barriers to watch for as you grow your enterprise
- Why some companies thrive through growth and others do not

READING GUIDE - KEY QUESTIONS TO BE ANSWERED:

As you read through each chapter, be sure to have your lesson plans open in front of you. They contain a series of questions that will help you pull out the most important concepts in your reading. Print out the questions and write in your answers as you read. That’s a good way to consolidate your knowledge and commit what you have read to practice and it is a good review prior to your exam.

- What business life cycle are we experiencing?
- How do leadership requirements change as we grow from one cycle to the next?
- What are my leaderships strengths?
- What do I need to work on as I grow the business?
- Have I embraced the core principles of sound leadership?
- Do I have the tools and knowledge to build my leadership skills in scaling up my business?
- How can I be aware of and overcome barriers to growth?
- How are people, strategy and execution all inter-related in a successful business?

CHAPTER 2

YOUR LEADERSHIP CAREER

KEY CONCEPTS AND ISSUES - WHAT YOU WILL LEARN:

This chapter will focus on the development of your own leadership style and skills as you take your business to the next level. Being aware of the stages of the leadership growth cycle, and recognizing what skills you need to develop will be critical in ensuring your ultimate success. You will learn the difference between management and leadership, how to lead both internally and externally, what is expected of today's leaders, as well as how leadership style and organizational culture are closely intertwined.

NEW SKILLS TO BE MASTERED:

- Understand what it takes to be a true leader
- How to lead internally and externally
- Why leadership is a development process
- How leadership and organizational culture are integrated

READING GUIDE - KEY QUESTIONS TO BE ANSWERED:

As you read through each chapter, be sure you have your lesson plans open in front of you. They contain a series of questions that help you pull out the most important concepts in your reading. Print out the questions and write in your answers as you read. That's a good way to consolidate your knowledge.

- Why leadership and management differ
- How leadership is both internal and external to an organization
- How leadership evolves as an organization grows
- How to integrate your leadership style with the culture of your business

CHAPTER 3

YOUR VISION, STRATEGY AND GOALS:

KEY CONCEPTS AND ISSUES - WHAT YOU WILL LEARN:

This Chapter will focus on the importance of building a shared vision that is supported by your strategy and plans for growth. You will learn how to define the vision and purpose for your organization and build it out to specific strategies, plans and goals in order to turn it into reality. You will also gain valuable insight on how to evaluate your progress toward your vision and goals along the way and make adjustments as required to get to where you need to go.

NEW SKILLS TO BE MASTERED:

- What it takes to build a Vision-Based organization with a clear set of goals
- How to put your Vision into actionable strategies and plans
- How to integrate your goals and plans into the core of your organization
- How to stay focused and accountable to your plan

READING GUIDE - KEY QUESTIONS TO BE ANSWERED:

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CHAPTER 4

BUILDING A SUSTAINABLE BUSINESS MODEL

KEY CONCEPTS AND ISSUES - WHAT YOU WILL LEARN:

In this chapter, we will focus on the importance of building a business model that is sound and sustainable. This will include discussion on why having a strong business model is critical in scaling up a business, and how to build out the model through the structure of your organization and the incorporation of systems and processes. You will also learn how having a well constructed business model adds real value to your business and equity over time.

NEW SKILLS TO BE LEARNED:

- What is a business model
- How your business model is different from your strategy
- How to build a sustainable business model
- Methods for building lasting infrastructure to your model that adds real value to your business
- How having effective systems and processes in your business helps you operate efficiently within the framework of your model

READING GUIDE - KEY QUESTIONS TO BE ANSWERED:

As you read through each chapter, be sure you have your lesson plans open in front of you. They contain a series of questions that help you pull out the most important concepts in your reading. Print out the questions and write in your answers as you read. That's a good way to consolidate your knowledge and commit what you have read to practice and it is a good review prior to your exam.

- Do I have a business model that is sustainable and transferable;
- How do I build a sustainable and scalable business model;
- Methods of building the model into the structure of my organization; and
- The importance of reviewing your business model to ensure it is still relevant

LEARNING ACTIVITIES:

To test the learning process, the student will answer multiple-choice questions and work through a true-to-life case study.

CHAPTER 5

BUILDING YOUR BRAND

KEY CONCEPTS AND ISSUES - WHAT YOU WILL LEARN:

This Chapter will focus on the importance of building a solid, distinguishable brand that will contribute to the equity of your business over time. You will also learn about the importance of building a shared purpose around your brand and how it can serve as the “glue” that holds your team together, as well as some effective strategies to bring your brand to life.

NEW SKILLS TO BE MASTERED:

- Understanding of the importance of brand and how it adds value to your business
- How to build brand loyalty
- Ways to build a shared focus on building your brand with your people
- How to engage your customers in your brand

READING GUIDE - KEY QUESTIONS TO BE ANSWERED:

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- Does my brand represent my vision and who we are as a company (our core competencies)?
- Is my brand distinguishable? Does it differentiate me from my competitors?
- Do my people share my brand core concepts and represent it well
- Do my customers understand and accept my brand principles
- Am I building equity in my company through building a strong brand?

CHAPTER 6

BUILDING TEAM CULTURE

KEY CONCEPTS AND ISSUES - WHAT YOU WILL LEARN:

There is no doubt that the ability to build a high performing team plays a critical role in scaling up a business. This chapter will provide some valuable information on understanding what teamwork and team culture is all about, as well as the stages that a team normally go through in their development. You will also learn how to watch for and overcome team dysfunctions and learn how to build and maintain a high performing team while also onboarding new members as you grow.

NEW SKILLS TO BE MASTERED:

- Understanding what a team culture is and why it is critical to your success as you scale up
- Knowledge of the stages of team development
- Methods for overcoming team dysfunctions
- Ways to build and maintain a high performing team
- How to effectively integrate new members into your organizational culture

READING GUIDE - KEY QUESTIONS TO BE ANSWERED:

As you read through each chapter, be sure you have your lesson plans open in front of you. They contain a series of questions that help you pull out the most important concepts in your reading. Print out the questions and write in your answers as you read. That's a good way to consolidate your knowledge and commit what you have read to practice and it is a good review prior to your exam.

- Do you truly understand what is meant by team culture?
- Can you define the culture of your business and how it is manifested in your organization?
- Are your team members embracing the culture internally and externally?
- What ways can you improve on your culture and ensure it is motivating and consistent with your vision, values and purpose?
- Do you have clarity on how to on-board new team members effectively within your culture?

CHAPTER 7

CRITICAL ACCOUNTABILITIES

KEY CONCEPTS AND ISSUES - WHAT YOU WILL LEARN:

Now that you understand how to pull your team together to work in harmony toward your company vision and goals, building accountability into the process will ensure you are measuring your overall performance and staying on track. This chapter will focus on helping you understand the importance of having an accountable organization, determine what your key accountabilities should be, and know how to measure and manage them effectively. You will also understand how holding your people accountable pays off not only in their performance and the success of the company, but also in their respect for you as a leader.

NEW SKILLS TO BE MASTERED:

- Understanding why building a culture of accountability is so critical to your success
- Knowing how to build a culture of team members holding each other accountable
- How to assess what accountabilities you need to track and monitor
- How to build in accountabilities that will get the results you are looking for
- How to ensure accountability becomes part of your long-term planning process

READING GUIDE - KEY QUESTIONS TO BE ANSWERED:

As you read through each chapter, be sure you have your lesson plans open in front of you. They contain a series of questions that help you pull out the most important concepts in your reading. Print out the questions and write in your answers as you read. That's a good way to consolidate your knowledge and commit what you have read to practice and it is a good review prior to your exam.

- Why a culture of accountability will help you succeed as you grow
- How to incorporate performance measurement into your business
- What are the most important key performance indicators(KPI's) for your business.
- How to ensure that your accountability tracking is consistent and credible.
- How to get your people to embrace a culture of joint accountability.

CHAPTER 8

MAKING THE RIGHT INVESTMENTS

KEY CONCEPTS AND ISSUES - WHAT YOU WILL LEARN:

In this Chapter, you will learn how to identify the investments that you will need to make to fill any gaps in your organization to ensure your systems and processes are stream-lining your work and adding value to your company. It will also help you understand what training you need to incorporate to elevate your team to new levels of success. You will be able to consider when to invest in technology and other infrastructure elements to build out your operational strengths, and how to ensure you are getting full value for these investments.

NEW SKILLS TO BE MASTERED:

- How to know what investments you need to make in your company as you scale up
- When/how to invest in your most important resource (your people)
- Why investment in infrastructure and the right technology pays off
- How to monitor your investments to maximize your ROI

READING GUIDE - KEY QUESTIONS TO BE ANSWERED:

As you read through each chapter, be sure you have your lesson plans open in front of you. They contain a series of questions that help you pull out the most important concepts in your reading. Print out the questions and write in your answers as you read. That's a good way to consolidate your knowledge. How people, strategy and execution are all inter-related in a successful business

- What are the current gaps in my organization
- Am I investing in my people where it counts?
- What investments should I be making in infrastructure and technology?
- Am I getting a return on my investments in the way that I want?

CHAPTER 9

MAKING TECHNOLOGY WORK FOR YOU

KEY CONCEPTS AND ISSUES - WHAT YOU WILL LEARN:

This Chapter will focus on the significant role that technology plays in today's digital business world. You will learn how to embrace technology and use it to improve your process management as well as your customer relationship strategies. Knowing how to integrate technology tools into your culture and the importance of keeping it current and fresh will be part of your learning activities.

NEW SKILLS TO BE MASTERED:

- How to research, select and integrate the right technologies for your business
- The implementation process: How to phase in technology to minimize disruption
- How to gain support and “buy-in” from employees during change
- Ways to ensure you are keeping pace with technological change

READING GUIDE - KEY QUESTIONS TO BE ANSWERED:

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CHAPTER 10

YOUR SUCCESSION PLAN:

KEY CONCEPTS AND ISSUES - WHAT YOU WILL LEARN:

In this final chapter, you will discover why building a company with sound leadership, vision and positive culture as well as clear accountabilities is necessary to realize the value of what you have built when you finally “cash out.” You will come to understand why it is important to work yourself out of the business to have equity growth and succession built into your organization.... so that you are ready when opportunities present themselves. Learning how to let go and to create opportunities for others to grow by mentoring them, will help you appreciate that great leadership is about moving up and out of the business you created.

NEW SKILLS TO BE MASTERED:

- Understanding of why some companies pull it all together and others do not.
- Importance of mentoring: Learning from the leaders
- How to develop an equity growth plan to maximize the value of your business.
- How to develop a succession plan without leaving the business.

READING GUIDE - KEY QUESTIONS TO BE ANSWERED:

As you read through each chapter, be sure you have your lesson plans open in front of you. They contain a series of questions that help you pull out the most important concepts in your reading. Print out the questions and write in your answers as you read. That’s a good way to consolidate your knowledge and commit what you have read to practice and it is a good review prior to your exam.



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