

SCALING SMALL BUSINESS OPERATIONS

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.

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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.

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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



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- Accounting and Tax Practitioners
- Business Consultants

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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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"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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MFA™- BUSINESS GROWTH SPECIALIST PROGRAM

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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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Scaling Small Business Operations

OVERVIEW
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.
APPROACH
Planning for sustainable growth requires a framework for operations around which client relationships can be built and retained. This course teaches how to structure the core operational areas required to successfully build and manage a company, including finance, administration, sales, marketing and staffing, as well as strategies to grow a market-driven business that someone will eventually buy.
WHY IS THIS CONTENT ESPECIALLY TIMELY AND/OR IMPORTANT
Learn how to structure the core operational departments that are required to successfully build and manage a company (i.e., finance, administration, sales, marketing, staffing, production & delivery of products/ services), as well as the policies and procedures that put business owners in the position to grow a market-driven, sustainable business that could ultimately be transferred to someone else. Student benefits include: <ul style="list-style-type: none"> • A better understanding of the key functional areas of a company; • Insight into the framework that should be in place to generate successful and sustainable performance; • A tangible approach to building and maintaining a company's operational foundation, increasing the likelihood that it could be transferred to someone else.
WHAT YOU WILL LEARN?
You will learn how to structure the core operational departments that are required to successfully build and manage a company, as well as the policies and procedures that put business owners in the position to grow a market-driven, sustainable business that could ultimately be transferred to someone else. You'll develop a better understanding of the key functional areas of a company and gain insight into the framework in place to generate successful and sustainable performance. As well, you'll discover a tangible approach to building and maintaining a company's operational foundation, thus increasing the likelihood that it could be transferred to someone else.
SCOPE OF THE CONTENT:
<ol style="list-style-type: none"> 1. Introduction: Differing Perspectives 2. The Business Leader's Vantage Point 3. Organizational Structure 4. Policies, Procedures, and Systems 5. The Finance and Administration Functions 6. The Sales & Marketing Functions 7. The Human Resources Function 8. Building and Delivering Products and Services 9. Developing an Action Plan 10. Implementation and Next Steps

CHAPTER 1

INTRODUCTION: DIFFERING PERSPECTIVES

KEY CONCEPTS AND ISSUES - WHAT YOU WILL LEARN:

- Recap of Business Planning course outcomes and relationship with operations (EBB Course #1)
- How businesses develop and an overview of their lifecycle
- Overview of a service delivery approach
- Overview of a business building approach
- Differences between the two approaches and the impact on the business leader role
- Transitioning to the role of business builder
- Why business building is integral to long term sustainability

NEW SKILLS TO BE MASTERED:

- Understand the difference between the service delivery and business building approaches
- Understand how business planning relates to operations, in terms of building a sustainable company

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.

- How do businesses typically develop?
- What is a service delivery approach?
- What is a business building approach?
- How do these two approaches differ?
- Why is it important to transition to the role of business builder?
- How is business building related to long term sustainability?
- Is my current approach more service delivery or business building in nature?

CHAPTER 2

THE BUSINESS LEADER'S VANTAGE POINT

KEY CONCEPTS AND ISSUES - WHAT YOU WILL LEARN:

- Overview of the business leader's vantage point
- Comparing strategic and operational perspectives
- Why a balanced perspective is integral for long term sustainability
- The relationship between business building and leadership
- Business leader role pitfalls to avoid
- Positioning for leadership success

NEW SKILLS TO BE MASTERED:

- Understand the difference between the business leader's vantage point and a service delivery approach
- How to maintain a balanced perspective in the leadership role

READING GUIDE - KEY QUESTIONS TO BE ANSWERED:

- What is the business leader's vantage point?
- What is a strategic perspective?
- What is an operational perspective?
- What is the difference between the two perspectives?
- What are some common pitfalls that business leaders face in this regard?
- How does business building relate to leadership?
- How can business leaders plan for leadership success, in terms of their vantage point?

CHAPTER 3

ORGANIZATIONAL STRUCTURE

KEY CONCEPTS AND ISSUES - WHAT YOU WILL LEARN:

- Overview of organizational structure and charts
- Key functional departments
- Departmental structure: staff and leadership roles
- Opportunities for operational leadership
- Opportunities for collaboration and communication
- Organizational structure pitfalls

NEW SKILLS TO BE MASTERED:

- Understand organizational structure and key functional departments
- Develop an organizational chart for the company

READING GUIDE - KEY QUESTIONS TO BE ANSWERED:

- What is an organizational chart?
- What are typical key functional departments?
- How could departmental structure be approached?
- What are some opportunities for operational leadership?
- How could departments collaborate to achieve better results?
- What are some organizational structure pitfalls to avoid?

CHAPTER 4

SYSTEMS, POLICIES, AND PROCEDURES

KEY CONCEPTS AND ISSUES - WHAT YOU WILL LEARN:

- Overview of systems, policies, and procedures
- Rationale for a strong operating environment
- Approaching system requirements
- Identifying policy and procedure needs
- Short and long term considerations
- System, policy, and procedure pitfalls to avoid

NEW SKILLS TO BE MASTERED:

- Understand how policies, procedures, and systems relate to the operating environment
- Identify areas of enhancement of policies, procedures, and systems

READING GUIDE - KEY QUESTIONS TO BE ANSWERED:

- How do systems relate to the operating environment?
- What are policies and procedures?
- How can policy and procedure needs be identified?
- How can system requirements be approached?
- What are some short and long terms considerations, in terms of operating policies, procedures, and systems?
- What are some pitfalls to avoid in this regard?

CHAPTER 5

THE FINANCE & ADMINISTRATION FUNCTIONS

KEY CONCEPTS AND ISSUES - WHAT YOU WILL LEARN:

- Overview of the finance function
- Overview of the administration function
- Key policy, procedure, and system requirements
- Key resource/staff requirements, in terms of skillset
- Finance and administration pitfalls to avoid

NEW SKILLS TO BE MASTERED:

- Understand how the finance and administration functions impact a company
- Identify areas of enhancement for the finance and administration functions

READING GUIDE - KEY QUESTIONS TO BE ANSWERED:

- What is the finance function?
- What is the administration function?
- What are the key operating aspects of the finance and administration functions?
- What types of skillsets are typically required in these functional areas?
- What are some pitfalls to avoid in the finance and administration areas?

CHAPTER 6

THE SALES & MARKETING FUNCTIONS

KEY CONCEPTS AND ISSUES - WHAT YOU WILL LEARN:

- Overview of the sales function
- Overview of the marketing function
- Key policy, procedure, and system requirements
- Key resource/staff requirements, in terms of skillset
- Sales and marketing pitfalls to avoid

NEW SKILLS TO BE MASTERED:

- Understand how the sales and marketing functions impact a company
- Identify areas of enhancement for the sales and marketing functions

READING GUIDE - KEY QUESTIONS TO BE ANSWERED:

- What is the sales function?
- What is the marketing function?
- What are the key operating aspects of the sales and marketing functions?
- What types of skillsets are typically required in these functional areas?
- What are some pitfalls to avoid in the sales and marketing areas?

CHAPTER 7

THE HUMAN RESOURCES FUNCTION

KEY CONCEPTS AND ISSUES - WHAT YOU WILL LEARN:

- Overview of the human resources function
- Key policy, procedure, and system requirements
- Key resource/staff requirements, in terms of skillset
- Human resources pitfalls to avoid

NEW SKILLS TO BE MASTERED:

- Understand how the human resources function impacts a company
- Identify areas of enhancement for the human resources function

READING GUIDE - KEY QUESTIONS TO BE ANSWERED:

- What is the human resources function?
- What are the key operating aspects of the human resources function?
- What types of skillsets are typically required in this functional area?
- What are some pitfalls to avoid in the human resources area?

CHAPTER 8

BUILDING AND DELIVERING PRODUCTS AND SERVICES

KEY CONCEPTS AND ISSUES - WHAT YOU WILL LEARN:

- Overview of product and service related functions
- Key policy, procedure, and system requirements
- Key resource/staff requirements, in terms of skillset
- Product and service delivery related pitfalls to avoid

NEW SKILLS TO BE MASTERED:

- Understand how products and service related functions impact a company
- Identify areas of enhancement for the product and service delivery functions

READING GUIDE - KEY QUESTIONS TO BE ANSWERED:

- What are the product and service related functions?
- What are the key operating aspects of product and service related functions?
- What types of skillsets are typically required in these functional areas?
- What are some pitfalls to avoid in product and service related areas?

CHAPTER 9

DEVELOPING AN ACTION PLAN

KEY CONCEPTS AND ISSUES - WHAT YOU WILL LEARN:

- Overview of the action planning process
- Defining tasks, priorities, and timing
- Assigning responsibility for action plan tasks
- When a company lacks the necessary resources
- Task accountability considerations
- Action planning pitfalls to avoid

NEW SKILLS TO BE MASTERED:

- Understand how action planning impacts the development and growth of a company
- Develop an operational action plan for the company

READING GUIDE - KEY QUESTIONS TO BE ANSWERED:

- What are the product and service related functions?
- What is the action planning process?
- How are tasks and priorities defined?
- How is the timing for action plan tasks defined?
- How is responsibility for action plan tasks assigned?
- What are some approaches that could be taken when a company lacks implementation resources?
- How could accountability considerations be approached?
- What are some action planning pitfalls to avoid?

CHAPTER 10

IMPLEMENTATION & NEXT STEPS

KEY CONCEPTS AND ISSUES - WHAT YOU WILL LEARN:

- Overview of the implementation process
- Approaches for implementation and monitoring
- The impact of time on implementation
- Addressing delays and other implementation issues
- Implementation and monitoring pitfalls to avoid
- Long term implementation and next steps considerations

NEW SKILLS TO BE MASTERED:

- Understand how implementation impacts the development and growth of a company
- Developing an implementation strategy for action planning

READING GUIDE - KEY QUESTIONS TO BE ANSWERED:

- What is the implementation process?
- How could implementation and monitoring be approached?
- What is the impact of time on implementation?
- How could implementation delays be addressed?
- What types of problems could occur during the implementation and monitoring process?
- What are some implementation and monitoring pitfalls to avoid?
- What are some things to keep in mind, in terms of long term implementation and next steps?



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