



**CPA**

CHARTERED  
PROFESSIONAL  
ACCOUNTANTS  
CANADA

COMPTABLES  
PROFESSIONNELS  
AGRÉÉS  
CANADA



# Unlock the potential of your business with performance management

## Certificate in Driving Organizational Profit and Performance



## Connecting planning and profit with the power of performance

Performance management improves strategic decision-making and helps executives manage and mitigate risk. It's an important growth area for CPAs.

Performance management (PM) uses strategic planning, analysis and prediction to create agile and resilient corporations. It is also a valuable strategic framework for streamlining finance and operations to foster innovation and maximize resources.

Organizations that prioritize PM are better equipped to achieve their goals and more sustainable long-term financial success.

### Performance management for CPAs

This program is designed to meet the growing demand from CPAs who want to learn and develop a stronger knowledge base in performance management:

- 33% of members say their roles require advanced performance management expertise
- six in ten CPAs surveyed agree that strong performance management skills are needed for career progression
- and 88% of members confirm that CPA Canada is the right organization to offer this type of specialized post-CPA certification

## Overview

The *Certificate in Driving Organizational Profit and Performance* offers a mix of online education and in-person studies to bridge theory and practice.

### Topics include:

- strategy mapping
- competitive environmental analysis
- customer and contribution analysis
- pricing, cost management and forecasting
- how to create results-oriented cascading goals
- dashboards and balanced scorecard implementation
- how to lead strategic and operational change

The Certificate in Driving Organizational Profit and Performance is a unique program for today's marketplace. It offers a mix of online education and in-person studies to bridge theory and practice.



## A curriculum that focuses on today's business challenges

In this program, you will develop the knowledge and skills needed to support strong decision-making, set smart performance targets and generate meaningful insights for your organization.

The *Certificate in Driving Organizational Profit and Performance* includes 30 hours of online learning and an additional 10 hours of in-person study with a facilitator-led capstone session and real-life scenario application.

### Part I - Online learning

Six self-paced modules that focus on performance management and measurement. These modules equip you with the right tools to effectively manage cost, profitability and pricing for better business performance.

### Part II - Capstone session

A comprehensive capstone session to apply what you've learned using case studies for an integrated, hands-on approach. During the capstone session, you will review the key concepts of each module, develop a deeper understanding of PM and how it can be applied to your organization, and take part in targeted business exercises, individually and in small groups.

There are self-assessment checks along the way to help you evaluate your success at different stages of the program. You will also have the opportunity to strengthen your skills as a leader – from working in teams and strategic problem-solving to guidance on successful presentations for boards and senior management.

A final capstone session is required to complete the *Certificate in Driving Organizational Profit and Performance*. Participants will be able to choose a convenient date from a schedule of capstone session offerings. Sessions will be offered virtually as well as in person to allow appropriate flexibility to participants across the country.

## Nationally recognized certification

Keep your career moving forward with a quality education, valuable thought leadership and built-in industry expertise from CPA Canada.

Students who successfully complete the *Certificate in Driving Organizational Profit and Performance* will receive a CPA Canada Certificate of Achievement, which is a nationally recognized symbol of excellence in continuing education for CPAs.



**Cam Scholey,**  
MBA, Ph.D., FCPA, FCMA

## Your instructor

Cam has spent the last two decades focusing on the strategic concepts of balanced scorecard and strategy mapping. His specific areas of interest are performance management, accounting, management controls and finance. Cam also teaches at the Royal Military College of Canada.

Cam is also an experienced author who wrote *A Practical Guide to the Balanced Scorecard* and has worked with CPA Canada to publish several management accounting guidance documents on strategy mapping and the balanced scorecard. He also contributes to CPA Canada as a session leader in the new CPA Professional Education Program (PEP), and has written content for PEP.



Part I	
ONLINE LEARNING	TOPICS
Module 1: Understanding your business	<ul style="list-style-type: none"> <li>• situation assessment</li> <li>• understanding your market</li> <li>• clarifying corporate objectives</li> <li>• strategy mapping</li> </ul> <p><b>Case study 1: Understanding your business</b></p>
Module 2: How to make your organization profitable: pricing and profitability	<ul style="list-style-type: none"> <li>• mastering the contribution margin approach</li> <li>• understanding factors related to pricing</li> <li>• using pricing as a competitive tool</li> <li>• understanding customer profitability</li> </ul> <p><b>Case study 2: Pricing and customer profitability</b></p>
Module 3: How to make your organization profitable: analyzing for performance	<ul style="list-style-type: none"> <li>• managing fixed cost performance</li> <li>• activity-based cost management</li> <li>• other cost improvement and productivity techniques</li> <li>• other performance improvement techniques</li> </ul> <p><b>Case study 3: Profitability through performance improvement</b></p>
Module 4: Tools for driving optimal performance	<ul style="list-style-type: none"> <li>• using validation testing as a strategic decision-making tool</li> <li>• using forecasting as a strategic performance tool</li> <li>• capitalizing on innovation for enhanced performance</li> <li>• putting all the pieces together for optimal performance</li> </ul> <p><b>Case study 4: Validation testing and innovation</b></p>
Module 5: Using scorecards to maximize performance	<ul style="list-style-type: none"> <li>• adopting the balanced scorecard as a performance management tool</li> <li>• cascading the balanced scorecard for performance at all levels</li> <li>• integrating the new performance management system throughout the company</li> <li>• conducting the scoring process with the balanced scorecard</li> </ul> <p><b>Case study 5: Creation and scoring of a balanced scorecard</b></p>
Module 6: Analyzing results and adjusting for enhanced performance	<ul style="list-style-type: none"> <li>• understanding how to scan the dashboard for priority areas requiring further examination</li> <li>• delving deeper into results</li> <li>• effecting strategic adjustments</li> <li>• effecting operational adjustments</li> </ul> <p><b>Case study 6: Analyzing results and making strategic and operational adjustments</b></p>

Part II	
IN-PERSON OR VIRTUAL	OBJECTIVES
<p><b>Capstone: Driving organizational profit and performance</b></p>	<ul style="list-style-type: none"> <li>• analyse each module and how various concepts work together</li> <li>• understand the importance of setting a good course of action</li> <li>• develop in-depth knowledge of performance measurement tools</li> <li>• apply program content in a business setting via group and individual exercises</li> </ul> <p><i>Note: As a final component of the certificate, the capstone session includes group work, presentations and individual exercises.</i></p>

## Registration

Price: **\$3,595** CPD: **40 hours**

Multiple dates and locations are available for Part II, including a virtual attendance option.

For more information, contact CPA Canada Professional Learning and Development at [pld@cpacanada.ca](mailto:pld@cpacanada.ca) or 1-888-337-3242.

For curriculum questions, contact Jeanette Hill, Principal, Continuing Education at [jhill@cpacanada.ca](mailto:jhill@cpacanada.ca) or 604-605-5065.

To register, visit: [cpacanada.ca/DrivingProfit](https://cpacanada.ca/DrivingProfit)





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