

Pathfinder Business Consulting

BUILDING POSITIVE RESULTS

Workshop catalog





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Overview of our programs

We build **long-lasting relationships** with our clients by understanding their people, business, and environment. This approach allows us to provide personalized and tailored learning solutions that are innovative and highly effective.

Our approach to training goes beyond the traditional classroom setting. We believe people **learn best by doing**, so our programs include a significant practical element allowing participants to apply what they learn.

We use a **variety of methods** like classroom training, simulations, and case studies to keep things engaging and interactive.

We know that in-person sessions aren't always possible, which is why we offer a **variety of platforms** for our learning programs. From virtual classrooms to distance-learning case studies, we make sure our programs are accessible and effective.

We offer standard "off-the-shelf" programs, like those you will find in this catalog, but we excel when we work closely with our clients to tailor materials specific to their needs.

This ensures the **training is directly transferable** to their workplace, using their terminology, methodologies, and case studies.





FINANCIAL ANALYSIS AND COMMERCIAL LENDING

Our workshops for Commercial Banking Account Managers are designed to equip account managers with the necessary skills to provide excellent service to clients and effectively manage their accounts. Through these workshops, participants learn how to navigate complex financial scenarios, analyze financial statements, and identify business opportunities.

Participants will learn the importance of building relationships, identifying client needs, and effectively communicating with clients to build trust and establish a solid foundation for long-term partnerships.

Our most popular workshops.

LENDING TO SME ENTERPRISES

This workshop is aimed at newer commercial lenders with less than three years of experience. It covers SME lending basics, including financial, industry, and management analysis, credit considerations, and credit application contents.

The course starts by examining financial statements and demonstrating how the financial statements are used to assess creditworthiness and determine the best product for each borrower.

They'll also gain knowledge about key terms and clauses in loan agreements.

Finally, the workshop explores different types of security that can mitigate non-payment risk.

Participants will come away with a solid foundation in SME lending fundamentals. They'll be able to make informed credit decisions for small businesses, using their new skills and knowledge to contribute to the success of their organizations.

FINANCIAL ACCOUNTING FOR LENDERS

This workshop will equip participants with the knowledge and skills necessary to analyze financial statements effectively.

The workshop covers a wide range of topics, including accounting principles, financial statements, and financial ratios.

Participants will learn how to interpret financial reports in context with macro trends, management proficiency, and historical trends.

The workshop teaches participants how to uncover the story being told by the balance sheet and how to analyze the components of the income statement, including working capital and the working capital cycle. They will also learn how to perform ratio analysis and benchmarking.

Finally, participants will apply their new skills and knowledge to case studies, performing trend analysis and presenting their overall assessment of the model companies.

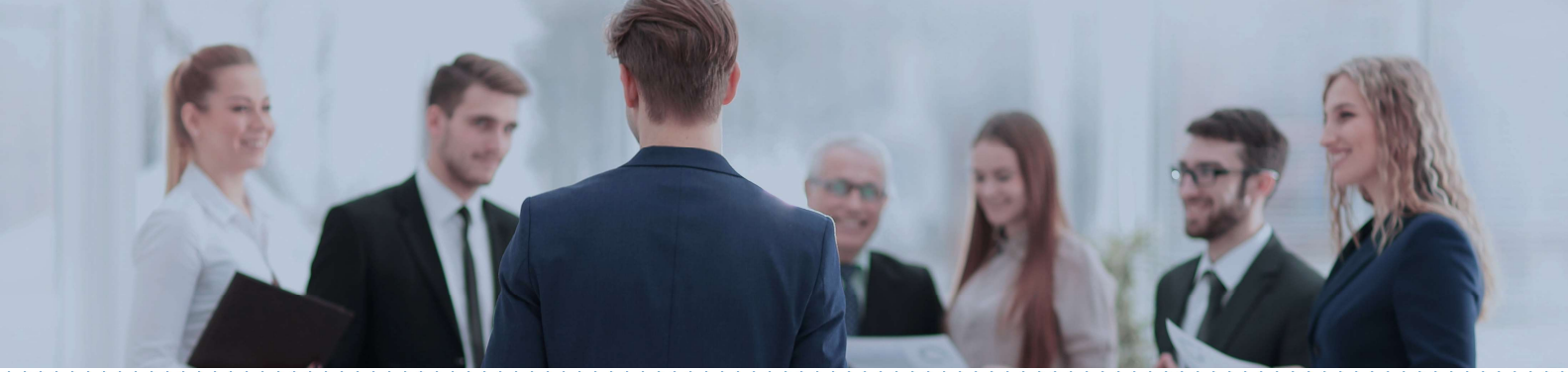
EFFECTIVE CREDIT WRITING

In this interactive workshop, participants will learn how to improve the quality of credit applications by presenting well-supported recommendations succinctly and using writing best practices.

The focus is on equipping attendees with writing tools to deliver clear, concise applications with the reader in mind.

The workshop covers several learning objectives, including structuring credit applications for improved comprehension of key issues, writing clearly and concisely, and addressing each application section with relevance and clarity.

Participants will sharpen their writing skills and learn to keep messages simple, aiming to deliver credit applications that better serve the reader's needs.



MANAGEMENT AND LEADERSHIP

Our leadership training workshops aim to unleash the full potential of individuals and organizations through a comprehensive curriculum that covers essential skills such as effective communication, conflict resolution, and decision-making. Our experienced trainers use engaging training methods suitable for all levels of professionals, ensuring that participants acquire the necessary skills to become successful leaders and drive growth.

Our workshops also focus on developing decision-making skills, including strategic planning and problem-solving. The leadership training workshops are designed to have a lasting impact on individuals and organizations, equipping them with the skills and knowledge needed to achieve their goals and drive success.

Our most popular workshops.

MANAGING YOURSELF

This workshop provides an opportunity to explore the drivers of personal impact that affect their daily working environment.

Participants will learn to understand their preferences for sharing information, leading to improved interpersonal effectiveness. They will also gain insight into their preferred team roles and how to best contribute within a team setting.

The course also covers maximizing impact in meetings, including how to best manage meetings and handle dysfunctional meeting behaviours. Participants will learn how to create the right impression when meeting, conversing, challenging, and committing to others by being alert and reactive to differing observable behaviours.

Overall, this workshop offers valuable guidance for individuals seeking to enhance their personal impact and effectiveness in the workplace.

LEADERSHIP AND INTERPERSONAL RELATIONSHIPS

The importance of effective communication and relationship-building skills in leadership is widely recognized.

In our Leadership and Interpersonal Relationships workshop, participants will learn how to employ the award-winning proprietary **V.I.P. process** for effective communications, strengthening relationships, problem-solving, and resolving conflicts. This will provide participants with the skills and strategies necessary to become more effective leaders.

The workshop is designed for anyone, regardless of their level of experience, who wants to build trust, communicate effectively, and foster a culture of collaboration.

Through interactive breakout sessions, real-world case studies, and expert guidance, participants will learn to navigate the complexities and challenges of relationships.

This is an excellent opportunity to develop interpersonal skills and enhance leadership abilities.

ESSENTIAL MANAGEMENT SKILLS

This workshop offers a comprehensive approach to management development, teaching fundamental roles and responsibilities of management.

Participants will learn to evaluate their current approach and explore self-improvement methods.

The workshop also covers providing effective feedback and coaching, setting objectives, managing performance, and difficult conversations.

Additionally, participants will gain the skills to work effectively with their teams and individual team members.

The workshop culminates in developing a personal action plan, immediately applicable in the workplace. Designed for practical skills and real-world scenarios, it's ideal for managers seeking to enhance their expertise.



FINANCIAL PLANNING AND ANALYSIS

Our FP&A workshops cater to the development needs of accountants and finance professionals, providing them with financial management tools and techniques. The topics covered in these workshops range from budgeting, forecasting, variance analysis, financial reporting, risk management, to strategic decision-making.

Through interactive sessions, participants will learn the principles of best practice financial management and apply them in their organizations. These workshops offer a valuable opportunity for newly qualified accountants and seasoned professionals to improve their financial management skills and stay up-to-date with industry trends.

Our most popular workshops.

INTRODUCTION TO STRATEGIC BUDGETING AND FORECASTING

In this interactive workshop, participants will learn how to adopt a strategic approach to budgeting, use variance analysis to track performance and improve their forecasting skills.

Geared towards those responsible for financial management, budgeting, and forecasting within their organizations, this workshop will provide attendees with the best practices and techniques necessary to create effective budgets and variance reporting frameworks.

By the end of the workshop, participants will understand the importance of budgeting within a strategic framework, and how to build a robust budgeting process within their organization.

Through interactive exercises, participants will gain practical tips on forecasting future performance by analyzing revenue and cost drivers and using effective variance reporting to track organizational performance.

BEYOND TRADITIONAL BUDGETING

This workshop is based on the principles of "Beyond Budgeting", the innovative management model that is designed to replace traditional budgeting practices.

The workshop aims to equip participants with the knowledge and skills required to implement this model within their own organizations.

During the course, participants will learn about the key principles of beyond budgeting, including the importance of decentralization, the need for greater flexibility, and the emphasis on performance management. Participants will also explore case studies of companies that have successfully implemented beyond budgeting, gaining insights into best practices and potential pitfalls.

By the end of the course, participants will be prepared to take the first steps toward implementing this management model within their own organizations.

ADVANCED BUDGETING TECHNIQUES

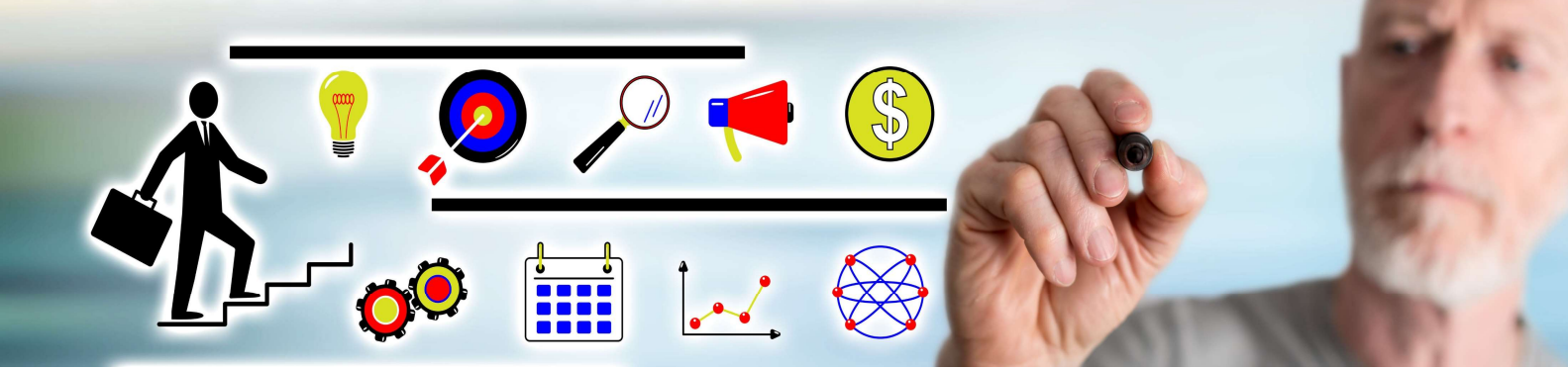
This workshop provides effective budgeting strategies beyond the basics and will enhance the participants' financial management abilities.

Participants will engage in interactive exercises and practical case studies to understand how to develop and oversee budgets that present an accurate picture of their company's financial status.

Key concepts to be explored include forecasting, variance analysis, cash flow management, and risk evaluation.

By developing these skills, individuals will be well-prepared to make informed decisions that will lead to the effective allocation of resources.

This workshop is designed for those who possess some prior experience in budgeting and wish to progress to the next level.



PROJECT MANAGEMENT

Our project management workshops are designed to improve the effectiveness of finance professionals and accountants when managing projects. The workshops are designed to enhance their ability to plan, execute, and control projects. This includes managing budgets, assessing risks, and identifying potential problems.

Each workshop also includes aspects necessary to improve their communication and collaboration skills with team members and stakeholders, which are critical in successful project management. Each workshop also provides a unique framework for decision-making, ensuring that projects align with organizational goals and objectives.

Our most popular workshops.

MANAGING SMALLER PROJECTS

This workshop provides a practical guide for project managers who oversee smaller, less complex projects.

The workshop outlines a flexible, step-by-step approach that focuses on the specific challenges of managing smaller projects, such as limited resources, tight budgets, and a small team.

Participants will be introduced to various project management tools and techniques that can be used to improve project delivery.

Overall, the workshop is designed for professionals who are responsible for managing small projects, such as team leads, supervisors, and managers who are new to project management or want to enhance their project management skills.

By the end of the workshop, participants will have practical skills that can be immediately applied to manage small projects.

THE ESSENTIALS OF PROJECT MANAGEMENT

This workshop is an excellent opportunity for professionals seeking to gain an understanding of project management basics.

Participants will learn how to identify critical project elements, understand the characteristics of each project stage, and create a toolkit of techniques to be used when working on a project team.

This workshop focuses on developing an effective project culture that is open, challenging, and realistic, with genuine engagement from all team members.

Through interactive sessions, participants will acquire the tools and knowledge needed to contribute to project success and ensure proper project control. This workshop is ideal for those new to project management or seeking a refresher course.

PROJECT MANAGEMENT FOR INTERNAL AUDITORS

This workshop is designed to equip internal auditors with project management skills to enhance their ability to plan, execute, and control audit projects.

Participants will learn how to develop project management plans, create work breakdown structures, and manage project risks.

Additionally, the workshop will cover project communication, team building, and leadership skills to help participants effectively manage audit teams.

This workshop equips participants with practical skills to manage audit projects effectively and deliver results within scope, time, and budget constraints.



PROCESS IMPROVEMENT AND INTERNAL CONTROL

Our process improvement and internal control workshops are designed to equip participants with a comprehensive understanding of the principles of process management. The perspective of each workshop is unique; however, all workshops aim to enhance participants' understanding of proven methods to improve business process efficiency and effectiveness.

Our workshops offer an exceptional opportunity for participants to gain a comprehensive understanding of process improvement and internal control principles. By the end of each workshop, participants will be equipped with practical skills and knowledge to implement these principles in their organizations and enhance business outcomes.

Our most popular workshops.

FUNDAMENTALS OF BUSINESS PROCESS IMPROVEMENT

Business process management (BPM) is a critical aspect of organizational success, involving the identification, modeling, execution, monitoring, and optimization of business processes.

This workshop provides an overview of BPM fundamentals and techniques, including process improvement methodologies, process modeling and analysis.

Participants will learn how to identify and prioritize business processes for improvement, map and analyze existing processes and use process metrics to track and improve performance.

This workshop is ideal for anyone interested in enhancing their understanding of BPM and developing skills for process improvement and optimization.

OPERATIONAL AUDITING

This workshop is designed to provide participants with a comprehensive understanding of operational auditing and its critical role in enhancing business outcomes.

The workshop explores the connection between control and business objectives. Participants will gain an understanding of the components of a business unit and explore operational control frameworks to identify areas of risk and potential improvements.

Operational auditing tools and techniques will be covered in depth to provide participants with practical skills and knowledge to apply in their organizations. Participants will learn how to effectively use these tools to assess and improve their organization's operations.

Participants will walk away with an understanding of techniques that can be used to benefit their organization.

INTERNAL AUDIT FOR THE NON-AUDITOR

Internal audit practices are beneficial for process improvement and risk management. This workshop introduces the fundamentals of internal audit for those who are unfamiliar with the practice.

Participants will learn how to use internal audit activities in evaluating an organization's operations, risk management, and governance processes. The workshop will cover internal auditing basics, including the tools and techniques used by beginning auditors to conduct risk assessments, perform control testing, and assess process efficiency and effectiveness.

Participants will also gain an understanding of how internal audit activities support an organization's strategic objectives.

By the end of the course, attendees will have a foundational understanding of the key principles of internal audit.



ADDITIONAL COURSES

WORKSHOPS RELATED TO ETHICS AND GOVERNANCE

How to Build an Ethical Culture

Focused on the tools and techniques necessary to build and maintain an ethical culture.

Becoming an Ethical Leader

Develops the knowledge necessary to promote ethical leadership in the workplace.

Corporate Governance for Not-For-Profits

Explores the unique governance challenges facing NPOs and how to improve governance.

WORKSHOPS RELATED TO RISK MANAGEMENT AND INTERNAL AUDIT

Risk Management Essentials

Develops the participant's understanding of risk management frameworks and demonstrates how the frameworks can be applied.

Enterprise Risk Management

Provides participants with the tools and techniques necessary to implement risk management within their own organizations.

Writing Effective Audit Reports

Teaches accounting and audit professionals how to write reports effectively with improved writing style and applying proper grammar.

Developing a Risk-based Audit Plan

This workshop shows how to identify the audit universe, develop a one-year plan, and develop a long-range audit plan.

Audit Best Practices

Provides participants with the knowledge and understanding of how internal audit can add value through assurance and consulting services.

WORKSHOPS RELATED TO LEADERSHIP AND BUSINESS STRATEGY

Setting Performance Objectives, Coaching, and Giving Feedback

Learn and practice skills for providing effective feedback and coaching for growth and performance using proven structures and techniques.

Becoming a Skilled Negotiator

Enable finance professionals to reach mutually agreeable business solutions by thinking and acting for the long-term success of negotiated outcomes.

Change Management Essentials

This workshop equips leaders with the skills they need to manage the change process effectively to ensure a positive impact on performance.



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ATB Financial™



MCB
INSTITUTE
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SAVINGS



CPA



servus
credit union

Our Pathfinder facilitator team boasts extensive experience in providing learning solutions to multiple companies within the accounting and financial services sector.

We are well-equipped to assist you in enhancing your performance.



Reach us at info@pathfinderBC.ca