

# THE WORLD'S LEADING BUSINESS ADVISORY CREDENTIAL (CPBA)



## BECOME A CERTIFIED PROFESSIONAL BUSINESS ADVISOR (CPBA)

The **Institute of Advisors** provides you with the **confidence, knowledge, credibility & community** to build your advisory practice

[www.instituteadvisors.com](http://www.instituteadvisors.com)

# WHY BECOME CERTIFIED WITH THE INSTITUTE OF ADVISORS?

Develop a stronger more successful advisory practice with a respected international credential.

Stand out from other advisors and display a brand of trust and quality.

Implement a process in your practice that has been developed over 30 years in conjunction with leading advisors from around the world.

Ensure your advisory services are professionally driven and lead to positive client outcomes.



## THE WORLD'S LEADING BUSINESS ADVISORY CREDENTIAL

### ALL ADVISORS WILL RECEIVE

#### ONLINE TRAINING & TUITION

The online self paced training course is a practical course, including videos, tutorials, practical tools and templates to use in your practice.

#### A "STEP BY STEP" ADVISORY PLAN

A practical advisory framework that provides a simple to follow plan that enables maximum effectiveness for your clients and profitability for your practice.

#### CONFIDENCE & KNOWLEDGE

A deep understanding of what it takes to build a successful practice & the confidence to start tomorrow.

#### STRUCTURE & PROCESSES

The methodology, systems and processes of what to offer and how to structure your client approach.

#### COMMUNITY, CONTACTS & EVENTS

Attend our chapter meetings and join 'Institute of Advisor' members from 10 countries around the world. Network with accountants, bookkeepers, private equity, business coaches M&A, financial planners, HR, strategic advisors, exit planners and more.

#### PROFESSIONAL ACCREDITATION

An accreditation with the most prestigious international Business Advisory organisations in the World will be awarded on successful graduation.

#### CERTIFICATION LOGO TO USE IN MARKETING

Upon successful graduation, you will be awarded an accreditation with the most prestigious international business advisory organisations in the world and permission to use the institute logo on your website, business cards and marketing.

The **Institute of Advisors** course sets me apart from other advisors and gives me **credibility**.

I am more confident, have **implemented better processes** and my clients end up with a **better outcome!**

# WHO IS THIS COURSE FOR?

Anyone wishing to **build a consultancy or advisory practice** targeting small to medium sized business.

- 01 ACCOUNTANTS / BOOKKEEPERS, .....
- 02 FINANCIAL & WEALTH PLANNERS, .....
- 03 BUSINESS ADVISORS, .....
- 04 CONSULTANTS AND BUSINESS COACHES, .....
- 05 EX BUSINESS MANAGERS, .....
- 06 EX BUSINESS OWNERS, .....
- 07 PROFESSIONAL ADVISORS SUCH AS M&A, BUSINESS BROKERS & LAWYERS. ....

**GOOD  
ADVISORS  
DON'T JUST  
HAPPEN BY  
CHANCE.**

## **BUSINESS ADVISORY CERTIFICATION (CPBA) FREQUENTLY ASKED QUESTIONS**

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### **HOW LONG DOES IT TAKE?**

The Business Advisory Certification is a 100% self-paced and online course with supplementary workshops facilitated by Institute representatives. The core video content is roughly 40 - 45 hours.

### **WHAT DOES MY COURSE FEE COVER?**

The course will enable you to receive 12 month membership to this institute which encompasses use of the institute logo itself as well as access to all webinar recordings done by leading professionals.

### **WHO IS THIS COURSE FOR?**

Anyone interested in learning how to become an advisor, be a consultant or become a coach. This includes accountancy firms, bookkeepers, business coaches & consultants, new start ex business managers as well as other professional advisors such as business brokers and wealth planners.

### **WHAT DO I WALK AWAY WITH?**

- Business Advisory Online self paced Course access for 12 months
- Assessment & Certification
- Access to all Institute Events
- Listing on Member Directory
- Permission to use the institute logo on website, business cards and marketing.

## THE GOALS OF THE **INSTITUTE OF ADVISORS** ARE AS FOLLOWS:

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Increase the standard of business advisors through certification and constant professional development.

Empower members through education and awareness events.

Provide local education and community events through chapters.

Ensure every business advisor, business consultant and business coach achieves certification in professional Business Advisory quality standards.

Encourage the alignment of advisors to a charter of ethics and professional standards that govern the industry.

# INSTITUTE OF ADVISORS COURSE CURRICULUM

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- 01** INTRODUCTION TO THE COURSE!  
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- 02** ROLE OF AN ADVISOR  
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- 03** DEVELOPING A BUSINESS MODEL  
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- 04** CONDUCTING CLIENT DISCOVERY MEETINGS  
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- 05** STRATEGIC DIRECTION & BUSINESS PLANNING  
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- 06** MONTHLY CLIENT REVIEW MEETINGS & SCORECARDS  
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- 07** MARKETING MY PRACTICE  
.....
- 08** PERSONAL RESILIENCE IN A CRISIS  
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- 09** BUSINESS RESILIENCE IN A CRISIS  
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## ABOUT THE INSTITUTE OF ADVISORS

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The Institute of Advisors was established in 2009 and is the leading global body representing business advisors and consultants around the world. We run certification courses in over 10 countries around the world and are leading the way in setting a worldwide set of standards.

# COURSE CURRICULUM

## INTRODUCTION TO THE COURSE!

In this module we introduce you to your instructor, the training platform, the modules and the assessments. We discuss the course outcomes. We show you how to use the training software and highlight the core mantra of the Institute of Advisors.

## ROLE OF AN ADVISOR

In this module we take a step back and view what it means to be a good advisor. We outline what it means to provide a good outcome for clients and what expectations a client has. We discuss the similarities to a sports coach, and the importance of 'Strategy, Execution and Accountability'. We also elaborate on some of the most important traits of an advisor, such as passion, credibility, empathy and trust.

## DEVELOPING A BUSINESS MODEL

In this module we guide you through the process of developing a business model from start to finish. Besides covering the modelling basics, we focus your attention towards selecting the right charge rate and identifying common barriers to entry.

## CONDUCTING CLIENT DISCOVERY MEETINGS

Following the completion of this module you will have a clear understanding of how to build rapport, map out the client discovery process, and have the confidence to step into that first meeting with the necessary knowledge.



## STRATEGIC DIRECTION & BUSINESS PLANNING

This module outlines the business planning process and the fundamental components to building a purposeful one. Not only do you identify the main driving forces behind strategic direction, but we also give you ready-made templates to implement in your next meeting.

## MONTHLY CLIENT REVIEW MEETINGS & SCORECARDS

This module connects the dots between the business plan and the measurable objectives that form the key focus of your monthly accountable meetings. The importance of KPI's and business scorecards are highlighted by hearing from our Academic Panel members.

## MARKETING MY PRACTICE

This module reviews how to successfully market your practice. We navigate you through the proven methodologies and processes that are considered staples to stand out from the crowd. We discuss business networking, advertising tips and personal selling examples.

## CRISIS MANAGEMENT – BUSINESS RESILIENCE

This module looks at some immediate actions a business owner can take during a crisis. It reviews the current cash of the operation and cash burn rate and then looks at strategies to build cash. The module looks at some high priority strategic tools that a business owner can use to pivot and grow during a crisis.

## CRISIS MANAGEMENT – PERSONAL RESILIENCE

In this module we discuss personal resilience in times of a crisis for both the business owner and the employees. How to take charge and think positively. Designed as a workbook, students can step their way through a 7 step process.

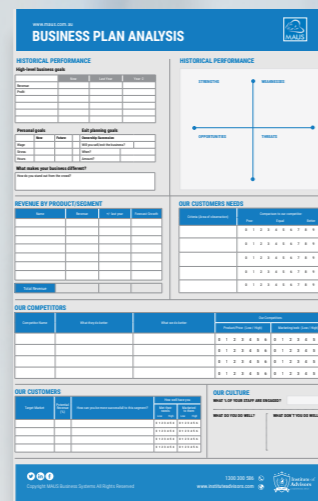
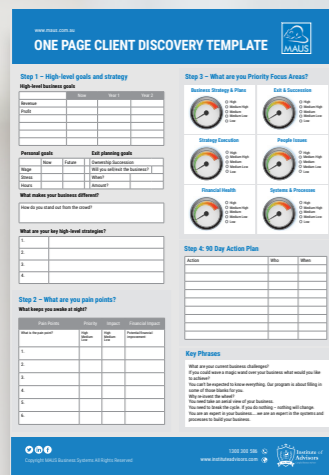
# READY-MADE CLIENT TEMPLATES

As part of the course, you will receive **several client diagnostic templates** and **video instructions** on how to implement in your practice.



## BE AN ADVISOR THAT STANDS OUT FROM THE CROWD.

USE THE INSTITUTE CERTIFICATE & LOGO IN MARKETING YOUR PRACTICE including LinkedIn, facebook, websites, social media, practice brochures, proposals and business cards.



**This Practical,  
Enjoyable Course  
Helped Me to Fastrack  
My Accountancy Firm. I  
Now Offer A Full Range  
Of Business Advisory  
Services**

## **HOW DOES THE COURSE BENEFIT ACCOUNTANTS, BOOKKEEPERS & PROFESSIONALS?**

### **STRUCTURE**

Accountants and Bookkeepers & financial professionals are heavily routine and financial based. Most have a set structure and avoid anything that could alter the norm. Moving outside the comfort zone needs to be gradual. Success in advisory means the implementation of a simple system that fits with the current workflow

Our Institute certification program gives you a step-by-step guide to structuring your engagements with your clients. The process can be stepped from simple monthly advisory meetings to full blown strategic assignments. You start where you feel comfortable.

### **CONFIDENCE**

Most Accountants and Bookkeepers we speak to are experts when it comes to financial metrics, they know their numbers back to front. Unfortunately they lack the knowledge and confidence to move the discussion towards strategic metrics.

The Institute course will help to build your confidence and knowledge, to open new conversations with your existing clients and in turn open new revenue streams.

### **CREDIBILITY**

The Institute of Advisor's logo is recognised in 10 countries, and stands as the leading professional body representing business advisors in the world.

## HOW DOES THE COURSE BENEFIT NEW START BUSINESS ADVISORS

### CREDIBILITY & MARKETING

Independents such as ex business managers and owners make great business advisors. However, independents often feel alone when stepping away from a field they have been in for an extensive amount of time and starting a new career. They don't feel confident and lack credibility that then impacts on their marketing.

Our Advisory Certification program was designed from the ground up by successful advisors from across the globe. The accreditation will give anyone that is starting a new practice instant credibility and a step by step process to market your practice.

### COMMUNITY & PARTNERSHIPS

Stepping into the world of advisory can be lonely. Our community of advisors allow you to mix with other advisors, network with them, receive and give referral work and continuously self develop.

The Institute of Advisors has certified advisors across the globe with online and face-to-face events running frequently to further expand your knowledge and network.

### DON'T WANT TO RE-INVENT THE WHEEL

Independents often lack a detailed plan when they step into the advisory space, they want to implement a system but don't want to re-invent the wheel.

Our Advisory certification program gives you a step-by-step guide to establishing and implementing your advisory services and developing a business model that you can scale, leverage and grow.



I knew I wanted to start an **advisory practice** but didn't know where to **start** and thought I lacked the **credibility**.

The **Certified logo** gives me **credibility** & joining the **local chapters** makes me feel like I am not alone anymore.

## NOT CERTIFIED & OFFERING ADVICE TO CLIENTS?

We believe that if you are a professional advisor then you need to adopt a strategic framework that governs your approach. We know that many advisors are offering poor advice to clients and this is because there are currently no mandated Business Advisory standards.

We believe that all advisors, consultants and accountancy practices should become certified in order to maintain a reputable set of standards.

**The Institute of Advisors is lobbying governments around the world to adopt a set of professional standards and practices and a baseline set of skills for the business advisory industry.**

**The Institute course is now running in over 9 countries around the world.**



The World's  
**Leading  
Business  
Advisory  
Credential**



## KEEP IN TOUCH!



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