

PROFESSIONAL CERTIFICATION

Become a Certified Professional Business Advisor

Build a successful consulting and advisory practice.

CERTIFIED PROFESSIONAL BUSINESS ADVISOR

INSTITUTE OF ADVISORS
STRATEGY • ADVICE • LEADERSHIP

Self-paced online study • Typically 3–4 months • Available internationally

instituteadvisors.com/certified-business-advisor-CPBA/

A step-by-step program for a successful practice.

The Certified Professional Business Advisor (CPBA) course combines practical study, an industry credential and a professional community, so you can build advisory capability and a practice that lasts.

Start with the role of the advisor, then develop your business model and explore more sophisticated business analysis. Learn to run a client acquisition program, lead the initial discovery process and deliver regular client reviews that support recurring advisory revenue.

Developed over 20 years, the course draws on advisory models successfully deployed around the world. That experience is distilled into three common success factors: a clear service offer, a structured client process and a consistent approach to delivering value. Practical tools and templates help you put the learning to work.

YOUR PRACTICE AND CLIENT JOURNEY

01	02	03	04	05
Role & business model	Client acquisition	Discovery & analysis	Planning & direction	Reviews & recurring work

The credential. The tools. The community.

- **Self-paced online study**
  Fit the program around your work.
- **Recognised CPBA credential**
  Demonstrate your professional capability.
- **Practical tools and templates**
  Apply a clear method to client work.
- **Professional community network**
  Connect with fellow business advisors.
- **Available internationally**
  A professional certification option for global participants.
- **A pathway to further study**
  Choose nationally recognised training toward the Diploma.

Turn informal conversations into a clear advisory offer.

Move from knowing you could advise to showing a client what you will do, how you will do it and what the engagement is worth.

FOR ACCOUNTANTS & BOOKKEEPERS

If you have tried introducing advisory but the conversations rarely become paid work, the course gives you a sequence: diagnose the business, frame the opportunity, propose a service, build a strategic plan and meet regularly to review progress.

You learn to discuss strategic measures alongside financial metrics, price the engagement and present advisory as a distinct service. The CPBA credential and Institute brand give you a professional signal as you reposition your practice.

FOR NEW ADVISORS & EXPERIENCED PROFESSIONALS

If you are leaving management or ownership, you may know business well but lack a starting framework, clients and a way to explain your offer. The course guides you through service design, charge rates, discovery, planning and ongoing delivery.

Practise the steps before your first client engagement, use the templates to give shape to your experience and put questions to a community of fellow advisors. Coaches and consultants can use the same method to strengthen an existing offer.

WHO IS THIS COURSE FOR?

Anyone wishing to build a consultancy or advisory practice targeting small to medium sized businesses

- Ex Business Owners
- Ex Business Managers
- Managers thinking of semi-retirement
- Accountants / Bookkeepers
- Financial & Wealth Planners
- Business Advisors
- Business Consultants and Coaches
- Professional Advisors – such as M&A, Business Brokers and Lawyers

AT A GLANCE

3–4 months typical completion	**10+** Countries where graduates originated	**50+** recorded guest-session topics	**Monthly** community sessions

A practice you can explain, price and grow.

Turn your experience into an advisory offer, with a clear method for attracting clients and delivering ongoing value.

01 Position your practice

Define who you help and what matters to those clients. Develop a business model and value proposition that make your advisory service easier to understand.

02 Win the first engagement

Use discovery meetings to understand the owner's priorities. Learn to frame the opportunity, present your service and connect your proposal to the value the client wants.

03 Price and package your services

Explore charge rates, billing strategies and engagement types. Shape services that clients can assess, with clear scope and a reason to keep working with you.

04 Create a rhythm for recurring work

Link strategic plans to scorecards and regular reviews. Use monthly client meetings to keep actions moving and support ongoing advisory engagements.

05 Market with professional resources

Use sample brochures, templates and marketing checklists to explain your services. Build a practical marketing plan around your positioning and client needs.

From first discovery to regular client reviews, you leave with a practical plan for building your advisory practice.

A client journey you can lead.

The central chapters follow a real advisory engagement. You move from understanding a business to setting direction, then establish a rhythm that helps the owner deliver the plan.

01

DISCOVER THE REAL PRIORITIES

Practise building rapport and asking questions that reveal the owner's goals, challenges and constraints. A discovery template, business priorities exercise and needs analysis tools help you organise what you hear before offering advice.

02

TURN INSIGHT INTO A PLAN

Examine customers, competitors, sales performance, SWOT, people and culture. Then bring the findings into a strategic direction, select the goals with the greatest impact and build a concise business plan with actions and accountability.

03

KEEP THE PLAN ALIVE

A plan matters when someone uses it. Link strategy to meaningful KPIs, build a scorecard, review actions in monthly or quarterly meetings and consider when an advisory board can add perspective and discipline.

YOU PRACTISE WITH REAL DELIVERABLES

- Client needs analysis
- Business diagnostic
- Strategic plan
- Proposal
- Monthly review scorecard

Know exactly what you will learn.

Six practical modules take you from your first client meeting to a practice that wins, plans for and keeps clients. Modules 1 to 3:

01 Step confidently into the advisor role

INSIDE THE MODULE

- What separates a good advisor from a great one
- Lessons from the GP and the sports coach
- How a client's business lifecycle shapes your role
- Asking the personal questions that build trust
- Ethics and your professional framework

YOU WILL KNOW

What clients truly need from you, and which skills to sharpen first.

02 Design a practice clients will pay for

INSIDE THE MODULE

- Your advisory roadmap and service options
- Find out how much you should charge
- Building recurring revenue and a clear return on investment
- Positioning your practice and sharpening your message
- Making the leap, with tips from expert advisors from around the world

YOU WILL KNOW

How to structure your practice, build a process that delivers maximum value, and price with confidence.

03 Win clients in the first meeting

INSIDE THE MODULE

- Running a client discovery meeting that converts
- Sell yourself, not a product
- Emotional intelligence and active listening skills
- Open questions that uncover a client's hot buttons
- Leading with your value proposition
- Key phrases and street-smart assessment tips
- Client Discovery software and presentation technology

YOU WILL KNOW

How to move the conversation beyond financial numbers and turn a first meeting into a new client.

From first plan to a thriving practice.

Plan, review and market with ready-to-use templates, case studies and sample plans. Modules 4 to 6:

04 Strategic Planning: Turn insight into a plan clients follow

INSIDE THE MODULE

- The one-page strategy comprehensive business plan
- Competitor, customer and sales segment analysis
- SWOT, strategic direction and biggest-impact goals
- People alignment and culture
- Sample business plan and client strategic plan template

YOU WILL KNOW

How to build a plan for a client and keep them accountable to it.

05 Monthly Review Meetings & Advisory Boards

INSIDE THE MODULE

- Strategic and operational metrics that matter
- The balanced scorecard, KPIs and strategy map
- Case study: John Smith
- Turning the scorecard into a monthly review meeting
- The language dictate earnings
- Advisory Boards

YOU WILL KNOW

How to run monthly reviews that build a platform of success for you and your client.

06 Market and commercialise your practice

INSIDE THE MODULE

- The 7 elements of success
- Engagement types, billing strategies and sample charge rates
- Sample marketing strategies and checklists
- Marketing building blocks from Experts
- Your personal activity plan and self-assessment

YOU WILL KNOW

What separates successful practices from failed ones, and how to create marketing that explains your services.

You do not build a practice alone.

Certification connects you to people, resources and continuing development as your advisory practice grows.



Illustrative image

A COMMUNITY TO LEARN WITH

Meet fellow advisors in monthly sessions, bring questions from your client work and grow your network. The resource library includes recorded guest sessions across more than 50 topics, with new development added every month.

A PRACTICAL TOOLKIT FOR YOUR CLIENT WORK

The CPBA resources include the full client diagnostics suite, coaching manuals and ready-to-use practice tools.

DIAGNOSE & PLAN

Client needs analysis, business health check, strategic audit and SWOT, financial ratios, competitor analysis and business planning templates.

COACH & GROW

Client growth and 12-month coaching manuals, the seven-step IOA profit program, proposals, monthly scorecards and practice-development resources.

Founded in 2009 • Australian RTO 91675 • CPBA industry credential

An Institute identity and advisor community behind your practice.

One professional credential. Two ways to achieve it.

Both options lead to the Certified Professional Business Advisor credential. Choose whether you also want Australian nationally recognised training outcomes.

CPBA Professional Certification

For busy professionals and international participants

A practical certification option for experienced people who want a structured advisory methodology.

CPBA + Nationally Recognised Training

Stage 1 of the 11408NAT Diploma pathway

Complete the CPBA credential with nationally recognised units of competency that contribute toward the Diploma.

COMPARE	PROFESSIONAL CERTIFICATION	CPBA + TRAINING
CPBA credential	Yes	Yes, the same credential
Study style	Self-paced online	Self-paced online
Advisory methods and resources	Yes	Yes
Nationally recognised units	No Australian VET outcomes	Yes, formal Australian VET outcomes
Delivered by	Institute of Advisors Pty Ltd, RTO 91675	Institute of Advisors Pty Ltd, RTO 91675

Study that fits around your work

Study online at your own pace. Typical completion is approximately 3–4 months, with a 12-month completion window. Optional live webinars help you connect with fellow advisors and apply the learning.

What advisors say.

Accountants, consultants and new advisors on what the CPBA program and the Institute have done for their practices.

Ibanessa Hogan, MBA, EA
Masterpiece Accounting Services

Professional development and real-world value

"Completing the Certified Business Advisor training has been an incredibly enriching experience for my career trajectory. It offered a depth of insight and personalized guidance that even my years pursuing an MBA did not provide. ... It not only broadened my understanding of the advisory landscape but also provided practical solutions to real-world challenges."

Mizal M
CPBA Graduate

Confidence, professional credibility and career growth

"The step-by-step advisory plan, coupled with access to a global network of professionals, has significantly boosted my confidence and credibility as a business advisor. ... Overall, the CPBA program has been a game-changer, equipping me with the knowledge, skills, and confidence to elevate my advisory practice to new heights."

Nariman Karimi

Starting an advisory practice

"A must-do course for anyone thinking of starting an advisory practice! Regardless of years of experience and seniority, the course gives a structure and a proven road map for preparing your offerings. Great engagement throughout."

Larry Weiss
Weiss Advisors

Business success

"I joined a year ago when I completed the Certified Professional Business Advisors. The program was instrumental in the success my firm Weiss Advisors has realized in the last year."

Lori Parkins
Parkins Financial

Practical skills applied with a client

"What I most liked about the course was that it pointed me in the direction that I really needed to focus on. Immediately after the course I had an opportunity with a client to build a 90 day plan on how to change her approach to marketing for new clients and other customers."

Jeff Downs

Practice development, resources and support

"Since joining the Institute I have really been able to take my consultancy practice to the next level. Great content, great resources, great support and even better people!"

Reviews from Google and Institute of Advisors testimonials.

Start with CPBA. Go further with the Diploma.

Build your professional advisory capability now, with a pathway to a full nationally recognised qualification when it suits your goals.

THE 11408NAT DIPLOMA OF BUSINESS ADVISORY PATHWAY

STAGE 1
CPBA with nationally recognised training

STAGE 2
Exit & Succession Planning

STAGE 3
Diploma Upgrade

The professional certification option also earns the CPBA credential, without Australian VET outcomes.



Sample certificate

WHEN YOU COMPLETE THE COURSE

Your CPBA certificate

You are awarded the Certified Professional Business Advisor designation, recognising the training, assessment and professional standards you have met.

EXPLORE YOUR CPBA OPTIONS

Your next chapter starts with a clear plan.

View course information and enquire online:

instituteadvisors.com/certified-business-advisor-CPBA/