



Business Financial Management

Part 1 & 2
Program Outline

Overview

Understanding and managing your business financial position is vital to building and running a strong and profitable business.

Our Business Financial management program helps any business owner become a savvy business owner by teaching everything from the basic concepts and principles of accounting to more advanced topics like business valuations, understanding non traditional funding and financing options for your business. Along the way, businesses will build their own financial plan including budgets, cash flow forecasts, pricing models, and more.

Participants will gradually build solid financial knowledge for their business and learn how to make wise decisions for their business by gathering and evaluating various forms of financial data.

COURSE STRUCTURE

Participants will receive instruction through online group zoom classes as well as in one on one coaching sessions. They will also have access to all course tools and content including recordings of classes on an e-learning hub, allowing them to review anything they missed at their own convenience. Participants can also become part of our Facebook group community, giving them an open forum to ask questions to instructors and other business owners.

COURSE HOURS

- **Part 1 - 2 Weekly 2 hr group zoom sessions for 6 weeks**
- **Part 2 - 3 months of bi-weekly zoom training (2 hrs twice a week)**
- **2 hours of one on one coaching scheduled for times that work for the participant in each program**





Who is this program for?

BUSINESS OWNERS

Financial management is the key for understanding how your business can or is making a profit. From making sure your pricing model is profitable to managing your expenses, it is present in every decision you make as a business owner. This program will help you know how your business is really doing, so that you can increase profitability by seizing opportunity and avoiding making decisions that are too risky.

MANAGERS

Financial management is essential for managers to track departmental performance, budgets, and other metrics, as well as making decisions, motivating teams, and maintaining a big-picture mindset. Understanding the financial impact of your decisions and performance will help you make better decisions and understand your direct contribution to your organization's goals and performance.



Simple, Practical, and Relevant

We are committed to providing your business with every possible advantage to thrive in Saskatchewan and beyond! Our experienced team provides your business with the expertise you need, available at your fingertips. With many options - from individual courses to complete certificate programs and one-on-one coaching, to mastermind groups, we've got you covered.

**WE EXIST TO JUMPSTART
MILLION-DOLLAR
BUSINESSES.**



Program Instructor

Sayem Hassan
786 Accounting & Tax

Sayem is a CPA – Chartered Professional Accountant, and a Certified Exit Planning Advisor, with a wealth of experience working with retail businesses, tech firms, and start-ups. Prior to starting 786 Accounting, he worked as a Tax Specialist for KPMG specializing in small businesses enterprise, and held an Executive role with the one of the largest fashion retailer in the country. He continues to provide CFO/Controller services to few select start-ups.

Sayem wanted to help business owners grow by providing industry-leading tech-enabled apps to manage their

accounting, advisory, and tax service that's why he founded 786 Accounting and Tax, Saskatchewan's award-winning firm, and the first fully virtual CPA firm offering a wide range of accounting services.

Their team is committed to helping businesses grow and thrive by providing an audit-proof Cloud-based system combined with personalized Accounting, Advisory, and Tax services



How our program will help build your business profits


Our financial management program will help you deeply understand your business & it's performance - leading to better strategic decisions about your operations, growth, and future leading to increased financial health and stability.

KEY TAKEAWAYS

In this program, participants will

- Understand why & how to managing their bookkeeping
- Learn how to use various accounting tools to prepare your financial statements
- Evaluate their company's health and performance using financial statements and ratios
- Become familiar with tax implications in various business structures, as well as the tax cycle

PROGRAM SECTION

- 
- SECTION 1
Bookkeeping
 - SECTION 2
Reports
 - SECTION 3
Management Accounting
 - SECTION 4
Business Structure & Taxes
 - SECTION 5
Planning
 - SECTION 6
Financing
 - SECTION 7
Growth & Exit Strategy

Understand how to value a business when buying, selling, or transitioning.

- Create financial budgets, projections, and forecasts that will help them make better decisions in your business.
- Understand how to mitigate common business risks.
- Learn how to evaluate & secure various forms of financing for your business

learning experience

SEE

Learners are introduced to content through stories, expertise, and humour.

SHARE

Knowledge is constructed by sharing and discussing with instructors, peers, and your target audience.

REFLECT

Learners are given the opportunity to reflect, relate, and write down key takeaways and action items each course.

TRY

Capstone activities connect key takeaways with business and action immediately to solidify new practices.

PROGRAM OUTCOMES

Financial Management Part 1

This program consists of 6 weeks of live online group learning, with 4 hours of zoom training every week. It is program is designed to help business owners ensure they are receiving good financial data using sound bookkeeping practices so that they can make informed decisions when evaluating their business financial health and performance.

1

INTRODUCTION & BOOKKEEPING BASICS

Familiarize yourself with online platform, course layout, & materials. Understand the bookkeeping cycle & the importance of good bookkeeping practices.

4

BALANCE SHEET, INCOME STATEMENT & USING RATIOS

Learn how to set up and run your meeting to build long lasting relationships with clients. Develop a powerful sales presentation around storytelling & make a strong recommendation.

2

ACCOUNTING SOFTWARE & THE SALES CYCLE

Learn how to implement bookkeeping software and customize a chart of accounts in your business

5

CASH FLOW, BUDGETING & PROFITABILITY

Learn how to anticipate & overcome objections to get a deal unstuck. learn how to advance the sale to a close and how to get a deal unstuck.

3

PAYROLL & INVENTORY MANAGEMENT

Learn key steps to the sales process allowing you to identify, qualify, & engage your ideal customers & stakeholders. Craft your script & build your persistence to win more appointments.

6

TAXES & BUSINESS STRUCTURE

Identify ways that you can improve the client experience to surprise & delight. Learn how to create raving fans and get referrals that lead to a significant increase in sales.

PROGRAM OUTCOMES

Breakthrough Sales Part 2

This program consists of 3 months of live online group learning, with 4 hours of zoom training every second week so that participants have a chance to spend alternate weeks working on their business. This program is designed to help sales professionals & businesses refine every aspect of their sales process and implement a sales plan that will help them increase their close ratio and sales revenue.

1

WORKSHOP 1

Familiarize yourself with online platform, course layout, & materials. Complete your personal assessment & evaluate your current sales capabilities. Complete your sales target evaluation and your Pains & Gains worksheet & develop your elevator pitch.

4

WORKSHOP 4

Build an Objection Handling Matrix & test it with the group. Refine & practice closing techniques with your peers.

2

WORKSHOP 2

Discuss your communication style & s create scripts for different personality types. Practice & collect feedback on your appointment scripts.

5

WORKSHOP 5

Build up your personal brand & your personal marketing strategy. Gather feedback on YOUR sales meeting video.

3

WORKSHOP 3

Build networking scripts & assess networking opportunities in your area. Build your Fact Finding Matrix & scripts and develop a 'gains and pains' presentation. Refine and collect feedback from the group on both.

6

WORKSHOP 6

Gather feedback on YOUR sales meeting video - continued. Evaluating your progress relative to workshop 1 and wrap up with any questions.

Program Credential

Upon the successful completion of the program, participants will receive a certificate of completion. This program is not graded as the purpose is for participants to gain the skills and knowledge they need to be successful in their business or career.



TRAINING COSTS

Breakthrough Sales Part 1

Weekly for 6 weeks, *24 Hrs Total Instructional Time*

\$ 500 Materials

\$ 4,457 Tuition

\$ 5,957

Breakthrough Sales Part 2

Bi-weekly for 3 months, *24 Hrs Total Instructional Time*

\$ 500 Materials

\$ 4,457 Tuition

\$ 5,957

Above prices are for each registered participant. Each business is encouraged to send 1 business owner or manager to audit the program alongside their registered participant to ensure the successful integration of tools and strategies into the business.

Our Guarantee

We guarantee that if you complete this program and apply what you've learned to your business, you will see an increase in profit within 1 year, or we will provide you with free coaching to help you figure out why you're not.

Visit bwise.ca/calendar for upcoming program start dates.

BUSINESS WISE COACHING LTD.

260 D - #10 Research Drive
Regina, SK S4S 7J7

BWISE.CA



@bwise_coaching

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