WOODARD™
INSTITUTE

# Certified Transformative Advisor Program

## Financial Advisory Certification

## Syllabus

I. Section One - Resetting the conversation by understanding the business environment - the OLD Accounting Process vs. the New Analysis Process.
- Module 1 - Financial Advisory - The Small Business Owner
- Module 2 - The Profitability Environment
- Module 3 - The Small Business Process
- Module 4 - Business Life Cycles and Why They Matter
- Module 5 - Planning for Thresholds
- Module 6 - Key Skills Required

II. Section Two - The Analytical Process - The What, How and Why of Financial Analysis. Why do things look the way they do and what does it tell us about the company's performance?
- Module 7 - Cost Accounting, Operating Expenses & Staff Efficiency
- Module 8 - Detailed Review of Metrics and Ratios
- Bonus Modules: Customer-Centric Collection & Customer Retention KPIs
- Module 9 - Technical (Quantitative) vs. Practical (Qualitative) Analysis
- Module 10 - Detailed Review of Various Forecasting Approaches to Achieve Specific Results
- Module 11 - The Details of Cash Flow Forecasting

III. Section Three - The Reporting Process - The Interpretation, Communication and Implementation of Operational Intelligence to improve results.
- Module 12 - A Detailed Discussion of the Client Coaching Conversation
- Module 13 - Using Variance Analysis and Common Size Reports
- Module 14 - Building Revenue Forecasts
- Module 15 - Building Expense Forecast Elements
- Module 16 - Steps in the Review and Advisory Cycle
- Module 17 - Understanding How to Drive Value (Overview of valuations)
- Module 18 - Putting it all Together