

FOUNDATION FIRST

Core 4 Program Overview

Manager Readiness for Finance and Accounting Professionals

What Foundation First Is

Foundation First is a manager readiness program for finance and accounting professionals in their first supervisory or management role. It provides the structured professional preparation that technical excellence alone cannot deliver.

Management is a profession. It requires role clarity, specific skills, and deliberate preparation. Most organizations promote strong performers without providing any of these. Foundation First addresses that gap.

Foundation First was developed by Shelley Lewis-Mercier, CPA, MBA (HR), former CFO, former senior HR executive and ICF-certified coach with more than 30 years of leadership experience developing finance professionals in Canada. It is the only manager readiness program of its kind built by someone who has personally owned budgets, managed controllers, led HR functions, and lived the consequences of poor management transitions from both the financial and the human side.

Not a course. A structured transition.

Four months. Four essential foundations. One cohort at a time. Limited to 15 participants. Designed specifically for finance and accounting professionals.

The Core 4 Modules

Each module runs for one month and builds on the previous. Each produces a specific shift in management capability.

01	The Role Shift FROM PEER AND INDIVIDUAL CONTRIBUTOR TO MANAGER What actually changes when you step into the management role, and why most organizations never explain it. Renegotiating relationships with former colleagues, understanding authority, and letting go of the identity that earned the promotion. Outcome: You stop doing the wrong job.
02	Time, Attention, and Priorities FROM EXECUTION TO ENABLEMENT How managerial time should actually be spent, and why most new managers get this wrong by default. Delegation frameworks specific to finance and accounting environments, calendar architecture, and the shift from doing to leading. Outcome: You stop working evenings to do your team's work.

03 Authority, Trust, and Confidence

LEADING WITHOUT OVER-EXPLAINING OR SEEKING APPROVAL

Authority is not something the title gives you. It is built through consistency, clarity, and genuine investment in your team's success. How to make decisions confidently and lead without needing consensus.

Outcome: You make decisions with confidence instead of hesitation.

04 Conversations That Prevent Problems

EARLY INTERVENTION RATHER THAN ESCALATION

How to deliver feedback clearly and calmly, address performance issues early before they compound, and manage through clarity rather than avoidance. The skills that prevent the people problems most new managers inherit.

Outcome: You stop managing around problems and start solving them.

Program Delivery

Live Cohort Sessions Two live sessions per month via Zoom. Interactive, discussion-based, with peers in the same professional transition. Minimum attendance: one session per month.	Office Hours with Shelley One hour per month of direct access. Participants bring real workplace challenges. Practical guidance from someone who has been on both sides of this transition.
Foundation First Learning Portal Recorded sessions, frameworks, and application exercises. Accessible at any time. Revisit content exactly when a workplace situation calls for it.	Workplace Application Practical exercises applied between sessions. Weekly reflection prompts. Peer accountability available within the cohort.

Duration: Four months (one module per month) **Time commitment:** Approximately 15 hours per month

Cohort size: Maximum 15 participants **Participants:** Finance and accounting professionals only

CPD hours: Approximately 60 structured hours. May qualify for CPA CPD requirements.

Completion: Foundation First Manager Readiness Certificate upon completion of all four Core modules.

Investment

Enrollment Option	Investment (CAD)	Notes
Individual — Pay in Full	\$4,500	Save \$500
Individual — Payment Plan	\$1,250 per module	4 payments, one before each module begins. Total \$5,000.

Organizational – Private Cohort	\$3,750 per person	Minimum 8 participants. Full payment per cohort. Custom scheduling available.
Organizational – Public Cohort	\$4,500 per person	1 to 7 participants at standard individual rate.

Elective modules are available following Core 4 completion at \$850 to \$900 per module. Topics include performance management, advanced difficult conversations, building leadership presence, and managing through change.

Organizations: a sponsorship letter template for internal budget requests is available at manager-readiness.com.

Who This Program Serves

- Newly promoted accounting managers and supervisors
- Finance managers stepping into their first people management role
- Controllers managing people for the first time
- Public accounting professionals promoted to manager or supervisor
- High-potential senior accountants and analysts preparing for an upcoming management transition
- Finance professionals with fewer than three years of management experience who have not received formal preparation

Foundation First is not designed for experienced managers with three or more years of management experience, or for senior executives seeking strategic leadership development.

Your promotion recognized what you have already achieved.

Foundation First prepares you for what comes next.

Take the free Manager Readiness Assessment at manager-readiness.com | Contact: shelley@manager-readiness.com

Individuals: Book a 15-Minute Introductory Call | Organizations: Book an Organizational Needs Call