

FOUNDATION FIRST

manager-readiness.com

MANAGER READINESS FOR FINANCE & ACCOUNTING PROFESSIONALS

You were promoted for your technical excellence. Nobody prepared you for what comes next.

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.

You are working harder than ever. You are second-guessing decisions that should feel straightforward. You are avoiding a conversation you know you need to have. And you are doing all of this while trying to look like you know exactly what you are doing.

This is not a personal failing. It is a predictable gap that most organizations never address. These are skills. And skills can be developed.

DOES THIS SOUND FAMILIAR?

You are not alone in this.

Every item on this list is something first-time managers in finance and accounting tell us they experience.

- You are doing your old job and trying to manage your team at the same time
- **You are exhausted because doing it yourself still feels easier than delegating**
- You avoided a difficult conversation this week, hoping it would resolve on its own
- You are not sure how much authority you actually have
- Managing former colleagues feels undefined and awkward
- You second-guess every significant decision you make
- You feel like you are supposed to already know how to do this
- Nobody gave you any real preparation for this role

If you checked even one of these, you are not failing. You are experiencing a predictable gap that organizations routinely create when they promote strong performers without preparing them for the management role. These are skills. And skills can be developed. That is exactly what Foundation First is built to do.

THE FIRST-TIME MANAGER JOURNEY

Where you are. Where you are going.

Excellent Individual Contributor → Promotion → The Gap → Foundation First → Effective Manager → Trusted Leader

WHAT CHANGES IN FOUR MONTHS

Not the program. You.

Here is what that shift looks like in practice for finance and accounting professionals who complete Foundation First.

RIGHT NOW	AFTER FOUNDATION FIRST
● Finishing work at 9 pm while also managing a team ● Dreading a conversation you know you need to have ● Unclear whether a decision is yours to make ● Managing former peers by hoping nothing changes ● Reacting to problems instead of preventing them ● Measuring yourself against the wrong definition of success	● Clear about what belongs to you and what belongs to your team ● Addressing issues early and calmly before they escalate ● Confident about your authority and where it applies ● Former peer relationships renegotiated and working ● Preventing problems through consistency and clarity ● Leading from the right role, measured by the right outcomes

A financial analyst sat across from me after a difficult performance review. She had been told she was not showing up as an analyst. She was frustrated and defensive. What I saw was different: someone who had not yet connected her natural curiosity to the actual work of analysis. We spent an hour talking about what analysis actually means, and about whether she was happy doing this work, because you spend too much of your life at work not to be. By the end she was engaged, not defensive. She did not need a warning. She needed someone to invest in understanding her. That is what effective management looks like. It is the skill set you will build in Foundation First. — Shelley Lewis-Mercier, CPA, MBA | Founder, Foundation First

THE PROGRAM

The Core 4: four months. Four essential foundations.

Each module addresses a specific gap between where most new managers start and where you need to be.

01 The Role Shift

FROM PEER AND INDIVIDUAL CONTRIBUTOR TO MANAGER

You will understand what actually changes when you step into this role, and why nobody explained it. You will learn how to renegotiate relationships with former colleagues, understand your authority, and let go of the identity that got you promoted.

You stop doing the wrong job.

02 Time, Attention and Priorities

YOU CANNOT DO TWO FULL-TIME JOBS

You will learn how managerial time should actually be spent, and why most new managers get this wrong. Delegation frameworks, calendar architecture, and the shift from execution to enablement so you can leave work at a reasonable hour.

You stop working evenings to do your team's work.

03 Authority, Trust and Confidence

LEADING WITHOUT OVER-EXPLAINING OR SEEKING APPROVAL

You will build authority through consistency, clarity, and genuine investment in helping your people succeed. How to lead without needing consensus and how to make the calls that are yours to make.

You make decisions with confidence instead of hesitation.

04 Conversations That Prevent Problems

FEEDBACK, PERFORMANCE, AND EARLY INTERVENTION

You will learn to address issues early, deliver feedback clearly and calmly, and prevent the people problems that consume management time. The conversation you have been avoiding is growing. You will learn to have it before it becomes something larger.

You stop managing around problems and start solving them.

WHAT YOU GET

Not a course. A structured transition.

Live Cohort Sessions — Never figure this out alone

Two live sessions per month via Zoom. Interactive, discussion-based, with peers navigating the exact same transition. Maximum 15 participants. All from finance and accounting.

Office Hours with Shelley — Bring your hardest challenge. Leave with a path forward.

One hour per month of direct access. Your real workplace situations. Practical guidance from someone who has spent thirty years on both sides of this transition.

Learning Portal — The tools exactly when you need them

Recorded sessions, frameworks, and application exercises. Revisit any content at any time, exactly when a workplace situation calls for it.

Peer Cohort — People who understand what you are going through

Every participant is a finance or accounting professional in their first management role. The context is shared. The conversations are specific.

Time commitment: Approximately 15 hours per month over four months. | Next cohort: September 2026. Four cohorts per year. Limited to 15 participants.

60 Structured Hours — Half your triennial CPA CPD requirement, applied to the role you are doing right now. Foundation First comprises approximately 60 hours of structured professional development. This training may qualify for your CPA CPD requirements, nearly half your entire three-year obligation, invested directly in the management skills your career demands.

WHAT PEOPLE SAY

Real feedback from people she's led.

Working under Shelley helped me grow and develop as a first-time manager in ways I did not expect. She was always available, but she rarely gave the answer. Instead, she gave me the space to talk through a situation and arrive at the conclusion myself. That approach built something more valuable than knowledge; it built confidence. I learned to trust my own judgment, even in conversations with people who had more experience and more tenure than I did. She also modeled something that is harder to teach: how to be genuinely approachable while still holding a clear standard of performance. You wanted to work with her because she gave you room to grow while making it clear that she was there when you needed her. I would recommend Foundation First to any first-time manager who wants to rethink what the role actually requires, and who wants to grow into it with real support. — J.H., Head of Finance

Shelley was more than my manager. She was a true mentor whose guidance shaped my confidence. She gave candid feedback, even when it was hard to hear, because she wanted me to grow and succeed. She saw potential in me before I saw it in myself. Her guidance extended beyond my professional work into how I think about my career and myself. She shared her wisdom generously, and the lessons I carry from working with her go far beyond the workplace. — S.L., Director, Finance Department

BUILT BY SOMEONE WHO HAS BEEN THERE

Shelley Lewis-Mercier

CPA, MBA (HR Specialization), ICF-Certified Coach, Former CFO

"I created Foundation First after watching too many talented professionals struggle, not because they lacked capability, but because no one told them what the role actually required. I was that person once. This is the program I wish had existed."

Over thirty years leading finance and HR teams, Shelley has lived both sides of this transition: as the professional promoted into leadership without preparation, and as the executive responsible for managers who were struggling without it.

- CPA (Chartered Professional Accountant)
- MBA, Human Resources Specialization
- ICF-Certified Professional Coach
- Former CFO and Senior HR Executive
- 30+ years developing finance professionals
- Built for finance and accounting professionals in Canada

YOUR INVESTMENT

Professional preparation at a professional standard.

The cost of one avoidable departure from your team exceeds the cost of this program. Preventing a single escalation, a single disengaged high performer leaving — either one more than justifies the investment. And you will leave with the skills to prevent both. The return on this investment is measured not only in retention, but in better decisions, stronger teams, and managers who become leaders faster.

BEST VALUE Pay in Full \$4,500 CAD — save \$500 Full program access. All four Core modules. One payment before your cohort begins.	Payment Plan \$1,250 CAD per module × 4 payments One payment before each module begins. Pay as you go. Total \$5,000 over four months.
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Organizational pricing: \$3,750 per person for groups of eight or more. Contact shelley@manager-readiness.com for a custom proposal.

Asking your employer to sponsor this investment: Many finance and accounting professionals have access to professional development budgets. A template letter for requesting employer sponsorship is available at manager-readiness.com. Group pricing is available for organizations enrolling eight or more managers simultaneously.

Your promotion recognized what you have already achieved. Foundation First prepares you for what comes next.

TAKE THE FIRST STEP

The next cohort begins September 2026. Seats are limited to 15.

Discover your greatest management strengths and the areas that deserve your attention first. The assessment takes five minutes and results are delivered immediately.

Take the Free Assessment — manager-readiness.com

Takes five minutes. Results delivered immediately. No obligation.

Questions? Contact Shelley at shelley@manager-readiness.com | manager-readiness.com

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