

PROGRAMME CATALOGUE · 2026 EDITION

Preparing the next generation to lead.

A structured learning platform built for family businesses and mid-market enterprises — combining governance, leadership, finance and practical operating skills into one place.

15

LEARNING PATHS

51

COURSES

4

GENERATIONS

1

LEGACY

WHY CILC ADVISORY

Legacy is built on preparation, not luck.

70% of family businesses don't survive the second generation, and 90% don't survive the third. The reason is rarely markets or capital — it's preparation. The next generation is handed operating responsibility long before they've been given the frameworks, financial fluency, and governance discipline that ownership actually requires.

CILC Advisory closes that gap with a single, structured learning platform. Fifteen curated learning paths sequence more than fifty courses across the disciplines a business owner or next-generation leader has to master: family governance, leadership, finance, HR, customer experience, marketing, and personal development. Every path is delivered online, at each learner's pace, with progress tracked at the individual and team level.

Family-first	Programmes purpose-built for founders, next-gen successors, and the trusted advisors around them.
Structured	Every path sequences courses from foundation to mastery — no guessing what to take next.
Practical	Real Caribbean scenarios, case studies, and tools you can apply to your business the same week.
Measurable	Progress, completions and assessments tracked per learner and per team, with manager reporting.

WHO IT'S FOR

Two audiences. One catalogue.

FOR FAMILY BUSINESS OWNERS & NEXT-GEN**Protect the enterprise your family built.**

Founders, senior family members, and next-generation successors preparing to take on ownership responsibility. Focus on governance, family alignment, financial literacy, and stewardship — the disciplines that determine whether the business survives the transition.

Start with: Family Business Fundamentals · Next-Gen Development · Finance & Wealth Management

FOR HR, CEOs & MID-MARKET LEADERS**Develop the people who run the business.**

HR managers, CEOs, and denote managers in mid-sized enterprises building a capable, retained, high-performing workforce. Focus on leadership, HR, customer service, marketing, and administrative excellence, with structured pathways per role.

Start with: Leadership & Management · Human Resources · Customer Service · Marketing

Learners can follow one path end-to-end, or draw from multiple paths as their role requires. Team assignments and progress reports make it simple to run this at scale.

CONTENTS

The 15 learning paths.

01	Accounting	Leaders & Teams	5 courses
02	Administrative Skills	Leaders & Teams	2 courses
03	Career Development	Leaders & Teams	0 courses
04	Customer Service	Leaders & Teams	6 courses
05	Family Business Fundamentals	Family Business	9 courses
06	Family Business Next-Gen Development	Family Business	0 courses
07	Finance & Wealth Management for Family Business Owners	Family Business	3 courses
08	Human Resources	Leaders & Teams	0 courses
09	Leadership & Management	Leaders & Teams	7 courses
10	Marketing	Leaders & Teams	2 courses
11	Mindset - The Key to Your Mental Health and Wellness	Leaders & Teams	1 course
12	Personal Development	Leaders & Teams	7 courses
13	Sales	Leaders & Teams	7 courses
14	Understanding & Application of Artificial Intelligence	Leaders & Teams	2 courses
15	Workplace Essentials	Leaders & Teams	0 courses

PATH 01 · LEADERS & TEAMS

Accounting

Build a solid foundation in accounting and financial management. Learn the principles of basic accounting, understand the three key financial statements, master QuickBooks, and develop the confidence to interpret financial information so you can make smarter business decisions. Whether you're a business owner, manager, or aspiring accountant, this learning path makes accounting practical, relevant, and easy to understand.

5

COURSES

5

LESSONS

Self-paced
FORMAT

Online
DELIVERY

COURSES IN THIS PATH

01

Practical Bookkeeping*Structured course covering the core competencies of this discipline.*

1 lesson

02

Guide to Financial Statements

An understanding of the numbers and key financials statements of your business

1 lesson

03

Basic Bookkeeping

Everything you need to understand and perform in a bookkeeping role

1 lesson

04

Quickbooks Online Tutorial*Structured course covering the core competencies of this discipline.*

1 lesson

05

QuickBooks Desktop Tutorial*Structured course covering the core competencies of this discipline.*

1 lesson

PATH 02 · LEADERS & TEAMS

Administrative Skills

Master the essential skills needed to keep any office organized, efficient, and running smoothly. This learning path covers administrative procedures, executive support, records management, business writing, meeting coordination, organizational skills, workplace communication, and the effective use of social media in a professional environment. Whether you're an administrative professional, executive assistant, office manager, or aspiring business support specialist, you'll gain the practical knowledge and confidence to become an indispensable part of any organization.

2

COURSES

2

LESSONS

Self-paced

FORMAT

Online

DELIVERY

COURSES IN THIS PATH

01

Basic Bookkeeping

Everything you need to understand and perform in a bookkeeping role

1 lesson

02

Artificial Intelligence Demystified

An introduction to artificial intelligence (AI)

1 lesson

PATH 03 · LEADERS & TEAMS

Career Development

Take control of your career by developing the professional skills employers value most. This learning path equips you with practical knowledge in communication, confidence, problem solving, time management, project management, negotiation, personal branding, entrepreneurship, and other essential workplace skills. Whether you're starting your career, preparing for your next opportunity, or looking to grow as a professional, you'll gain the tools and confidence to stand out, adapt, and achieve long-term career success.

0

COURSES

0

LESSONS

Self-paced

FORMAT

Online

DELIVERY

Courses for this path are currently being curated. Contact us to be notified when this path opens for enrolment.

PATH 04 · LEADERS & TEAMS

Customer Service

Deliver exceptional customer experiences that build trust, loyalty, and long-term business success. This learning path equips you with the skills to provide outstanding customer service, handle difficult customers with confidence, deliver world-class customer support, and excel in call centre environments. Whether you interact with customers face-to-face, online, or by phone, you'll learn practical techniques for creating memorable service experiences that keep customers coming back.

6

COURSES

6

LESSONS

Self-paced

FORMAT

Online

DELIVERY

COURSES IN THIS PATH

01

Customer Service Excellence

1 lesson

Everything you need to know on how to keep your customers and create raving fans.

02

Customer Support

1 lesson

Structured course covering the core competencies of this discipline.

03

Customer Service Fundamentals

1 lesson

Structured course covering the core competencies of this discipline.

04

Handling Difficult Customers

1 lesson

Customer service is a necessary position in the job world today. It helps companies give customers what they want and what they need. Although many customers can be difficult, with the right training, skills, and knowledge, any difficult customer can be handled properly and effectively. With a positive attitude, you...

05

Call Centre Training

1 lesson

Structured course covering the core competencies of this discipline.

06

Contact Centre Training

1 lesson

Structured course covering the core competencies of this discipline.

PATH 05 · FAMILY BUSINESS

Family Business Fundamentals

Build a strong foundation in the principles that make family businesses successful across generations. This learning path explores how family enterprises are structured and governed, covering topics such as the mechanics of your family business, financial literacy, the 4-Room Governance Model, Parallel Planning, Bowen Family Systems Theory, the Three-Circle Model, organization development, family charters, and other proven frameworks. Whether you are a founder, family member, or next-generation leader, you'll gain the knowledge and practical insights needed to strengthen governance, improve family alignment, and build a lasting family legacy.

9

COURSES

9

LESSONS

Self-paced
FORMATOnline
DELIVERY

COURSES IN THIS PATH

01

The Mechanics of Your Family Business

1 lesson

This course opens the hood and allows you to take a deeper look inside your family business. Six short modules that explain, in plain language, how a commercial enterprise is actually built and run.

02

What is Organization Development

1 lesson

An understanding of Organization Development

03

Guide to Financial Statements

1 lesson

An understanding of the numbers and key financials statements of your business

04

Family Business Insights

1 lesson

A series of videos on family businesses

05

What is a Family Charter

1 lesson

The key document for building family alignment and harmony

06

The Family Business Handbook

1 lesson

A summary of the Harvard Business Family Business Handbook

07

Family Business 4-Room Governance

1 lesson

The model for ensuring structure, alignment, harmony and your business family.

08**Bowen and the 3 Family business Axis / Circles****1 lesson**

Understanding Bowens family systems theory and how it impacts the 3 axis of every family business.

09**Parallel Planning for Family Businesses****1 lesson**

The key to ensuring your family and business stays aligned, healthy, functional and successful.

PATH 06 · FAMILY BUSINESS

Family Business Next-Gen Development

Prepare to become a responsible and capable steward of your family's business and legacy. This learning path equips next-generation family members with the knowledge, mindset, and practical skills to understand the family enterprise, transition into ownership, embrace stewardship, and work effectively with family, leaders, and trusted advisors to ensure long-term success across generations.

0

COURSES

0

LESSONS

Self-paced

FORMAT

Online

DELIVERY

Courses for this path are currently being curated. Contact us to be notified when this path opens for enrolment.

PATH 07 · FAMILY BUSINESS

Finance & Wealth Management for Family Business Owners

Develop the financial knowledge needed to build a stronger business, grow family wealth, and preserve your legacy for future generations. This learning path helps family business owners understand financial statements, make better investment decisions, manage cash flow, and apply sound wealth management principles to both the business and the family. Learn how to balance business success with long-term family prosperity, ensuring your enterprise creates lasting value for generations to come.

3

COURSES

3

LESSONS

Self-paced

FORMAT

Online

DELIVERY

COURSES IN THIS PATH

01

Guide to Financial Statements

1 lesson

An understanding of the numbers and key financials statements of your business

02

Stock and the Stock Market 101

1 lesson

Understanding the key principles around stocks and the stock market.

03

10 Assets Old Money Families Hold To Preserve Wealth for Generations...

1 lesson

Have you ever wondered why some family fortunes seem to vanish in a generation or two, while others last for centuries? There's a famous warning in wealth management circles: "shirtsleeves to shirtsleeves in three generations." And it's not just a folksy saying—it points to a painful truth. Find out here.

PATH 08 · LEADERS & TEAMS

Human Resources

Develop the knowledge and skills to attract, develop, engage, and retain exceptional people while building a positive, compliant, and high-performing workplace. This learning path covers the core principles of human resource management, including recruitment, onboarding, talent management, succession planning, employee relations, workplace wellness, harassment prevention, performance management, and HR policies. Whether you're an HR professional, manager, business owner, or team leader, you'll gain practical tools to effectively lead people, strengthen organizational culture, and drive sustainable business success.

0

COURSES

0

LESSONS

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Online

DELIVERY

Courses for this path are currently being curated. Contact us to be notified when this path opens for enrolment.

PATH 09 · LEADERS & TEAMS

Leadership & Management

Develop the knowledge, skills, and confidence to lead people and deliver exceptional results. This learning path covers the core principles of leadership, coaching, motivation, performance management, team building, trust, and effective supervision, equipping both new and experienced managers to build high-performing teams and lead with lasting impact.

7

COURSES

7

LESSONS

Self-paced
FORMATOnline
DELIVERY

COURSES IN THIS PATH

01

Managing for Results

Management Development for new managers

1 lesson

02

Performance Management*Structured course covering the core competencies of this discipline.*

1 lesson

03

Leadership & Influence*Structured course covering the core competencies of this discipline.*

1 lesson

04

Employee Motivation*Structured course covering the core competencies of this discipline.*

1 lesson

05

Coaching & Mentoring*Structured course covering the core competencies of this discipline.*

1 lesson

06

Supervising Others*Structured course covering the core competencies of this discipline.*

1 lesson

07

Self Leadership*Structured course covering the core competencies of this discipline.*

1 lesson

PATH 10 · LEADERS & TEAMS

Marketing

Learn how to attract the right audience, build a powerful brand, and grow your business through effective marketing. This learning path covers the fundamentals of traditional and digital marketing, social media marketing, lead generation, public relations, presentation skills, event planning, webinars, and other proven marketing strategies. Whether you're an entrepreneur, business owner, marketer, or sales professional, you'll gain the practical skills and confidence to create impactful campaigns, generate qualified leads, and drive sustainable business growth.

2

COURSES

2

LESSONS

Self-paced

FORMAT

Online

DELIVERY

COURSES IN THIS PATH

01**Digital Marketing - A Full Course***Structured course covering the core competencies of this discipline.***1 lesson****02****Introduction to Marketing***Structured course covering the core competencies of this discipline.***1 lesson**

PATH 11 · LEADERS & TEAMS

Mindset - The Key to Your Mental Health and Wellness

Discover how your thoughts shape your emotions, decisions, relationships, and overall quality of life. This learning path provides practical strategies for developing a healthy mindset, managing stress, building resilience, and cultivating habits that promote mental health, emotional well-being, and personal growth. Learn how to take control of your thinking so you can experience greater peace, purpose, and success in every area of your life.

1

COURSES

1

LESSONS

Self-paced

FORMAT

Online

DELIVERY

COURSES IN THIS PATH

01**The Achievers Mindset Vault**

Key principles for Achievers

1 lesson

PATH 12 · LEADERS & TEAMS

Personal Development

Develop the mindset, habits, and skills needed for lasting personal and professional success. This learning path equips you with practical tools for goal achievement, continuous learning, personal branding, negotiation, and lifelong growth, helping you maximize your potential and achieve your goals with confidence.

7

COURSES

7

LESSONS

Self-paced
FORMAT

Online
DELIVERY

COURSES IN THIS PATH

01

The Achievers Mindset Vault

Key principles for Achievers

1 lesson

02

The Goal Achievement Formula

Keys to setting and achieving your goals, dreams and desires.

1 lesson

03

Conversations About Achievement

More about setting and achieving goals

1 lesson

04

SMART Goal Setting

How to set SMART Goals

1 lesson

05

Continuous Learning

An approach to life long learning

1 lesson

06

Personal Branding 101

How to develop your personal brand. Keys for everyone to let others see who they really are.

1 lesson

07

Introduction to Negotiations

Learn the art of the deal

1 lesson

PATH 13 · LEADERS & TEAMS

Sales

Master the principles and skills required to consistently win more customers and grow revenue. This learning path covers the complete sales process—from prospecting and lead generation to overcoming objections, closing sales, and coaching others to succeed. Whether you're new to sales or looking to sharpen your skills, you'll gain practical, proven techniques to build stronger relationships, increase your confidence, and achieve outstanding sales results.

7

COURSES

7

LESSONS

Self-paced
FORMAT

Online
DELIVERY

COURSES IN THIS PATH

01

Sales 101

Everything you need to know about how to help others buy from you.

1 lesson

02

Top 10 Sales Secrets*Structured course covering the core competencies of this discipline.*

1 lesson

03

Sales Fundamentals*Structured course covering the core competencies of this discipline.*

1 lesson

04

Prospecting & Lead Generation*Structured course covering the core competencies of this discipline.*

1 lesson

05

Overcoming Sales Objections*Structured course covering the core competencies of this discipline.*

1 lesson

06

In-Person Sales*Structured course covering the core competencies of this discipline.*

1 lesson

07

Coaching Sales People*Structured course covering the core competencies of this discipline.*

1 lesson

PATH 14 · LEADERS & TEAMS

Understanding & Application of Artificial Intelligence

AI is here to stay. Understand the fundamentals and the application.

2

COURSES

2

LESSONS

Self-paced

FORMAT

Online

DELIVERY

COURSES IN THIS PATH**01****Artificial Intelligence Demystified**

An introduction to artificial intelligence (AI)

1 lesson**02****Underatanding and Applying AI**

Structured course covering the core competencies of this discipline.

1 lesson

PATH 15 · LEADERS & TEAMS

Workplace Essentials

Build the professional skills and workplace behaviors that contribute to a positive, productive, and high-performing organization. This learning path covers business ethics, professional etiquette, conflict resolution, change management, corporate behavior, respect in the workplace, networking, business acumen, responsibility, and appreciative inquiry. Whether you're beginning your career or looking to strengthen your professional effectiveness, you'll develop the mindset and skills needed to work collaboratively, build strong relationships, and make a meaningful impact in any workplace.

0

COURSES

0

LESSONS

Self-paced

FORMAT

Online

DELIVERY

Courses for this path are currently being curated. Contact us to be notified when this path opens for enrolment.

READY WHEN YOU ARE

Arrange a trial. Talk to us.

See the platform, review the paths most relevant to your business, and pilot with your team before you commit. We'll walk you through it — no obligation.

ONLINE

training.cilcadvisory.com

ADVISORY

CILC Advisory

NEXT STEP

Complete the contact form