# Training plan on <# topic #>

By ABC Training Entreprise

Presented to <#client#>

ABC Training Entreprise is pleased to offer a training plan on <# topic #> to <# client #>. This training is intended for <# nb\_participants #> participants and will be delivered <#LOWER(format)#><#IF(format="Face-to-face", " at the premises of " & client & " in " & city\_client & ", ”& country\_client) #>.<## If the selected format is "Face-to-face", the text will indicate the location of the training ##>

<## Section to be displayed according to the chosen training topic ##><# @IF(topic="Financial Management in a Start-Up Context") #>This <# nb\_days #>-day <## Indicates the number of training days ##>training is designed to provide participants with a complete and practical understanding of financial management in the context of start-ups, enabling them to make informed financial decisions to ensure the growth and sustainability of their businesses.

### **Target Audience**

* Aspiring entrepreneurs
* Start-up founders
* Start-up managers
* Junior financial managers in start-ups

### **Learning objectives**

1. Understand the fundamentals of financial management.
2. Learn how to create and manage a start-up budget.
3. <# @IF(nb\_days >= 2) #><## Displays the objectives below based on the number of training days indicated ##> Know how to read and interpret key financial statements.
4. Develop cash flow management skills. <# @ENDIF #>**<## End of condition for 2 or more training days ##>**
5. <# @IF (nb\_days = 3) #>**<## Start of condition for 3 training days ##>**Gain knowledge of start-up financing and fundraising.
6. Set up financial performance indicators. <# @ENDIF #>**<## End of condition for 3 training days ##>**

### **Methodology**

* **Theoretical sessions: Interactive presentations with slides**
* **Case studies: Analysis of real start-up situations**
* **Practical workshops: Exercises and simulations**
* **Group discussions: Sharing experiences and brainstorming**
* **Q&A: Question-and-answer sessions with experts**

### **Training Program**

#### <# IF(nb\_days >= 2, « DAY 1 -») #> Introduction to Financial Management and Budgeting

<## If the training is 2 or 3 days, the day's content description will show the word "DAY 1 -", followed by the training day, and then the title of the content. If the training is for one day only, only the title of the content will be displayed (without the word DAY) ##>

**A.M. :**

* **Introduction to Financial Management**
  + **Importance of financial management for start-ups**
  + **Role of the financial manager in a start-up**
  + **Basic accounting principles**
* **Practical exercise: Identifying expense and revenue items in a fictional start-up**

**Break**

**P.M.:**

* **Budgeting and Budget Management**
  + **Types of budgets (forecast, cash flow, etc.)**
  + **Techniques and tools for creating a budget**
  + **Adjusting the budget according to operational realities**
* **Case study: Developing a budget for a tech start-up**
* **Practical workshop: Creating an initial budget for a personal start-up**

<# @IF(nb\_days >= 2) #><## If the training is 2 or 3 days, the content of day 2 will be displayed ##>

#### DAY 2 - Financial Statement Analysis and Cash Flow Management

**A.M.:**

* **Understanding Financial Statements**
  + **The balance sheet: structure and analysis**
  + **The income statement: structure and interpretation**
  + **Cash flow statement: importance and understanding**
* **Practical exercise: Analyzing the financial statements of an existing start-up**

**Break**

**P.M.:**

* **Cash Flow Management**
  + **Importance of cash flow for start-ups**
  + **Cash flow management techniques**
  + **Cash flow forecasting and optimization**
* **Case study: Managing cash flow in a growing start-up**
* **Practical workshop: Creating a cash flow statement for a fictional start-up<# @ENDIF #>**<## End of the section for Day 2 ##>

<# @IF(nb\_days = 3) #> <## If the training is 3 days, the content of day 3 will be displayed ##>

#### DAY 3 - Financing and Performance Indicators

**A.M. :**

* **Start-up Financing Options**
  + **Sources of funding: bootstrapping, venture capital, loans, etc.**
  + **Pros and cons of each funding source**
  + **Preparing for fundraising: business plan, due diligence**
* **Case study: Analyzing different successful fundraising examples**

**Break**

**P.M. :**

* **Setting Up Financial Performance Indicators**
  + **Key financial KPIs for start-ups: CAC, LTV, burn rate, etc.**
  + **Tracking and analyzing KPIs**
  + **Using KPIs for strategic decision-making**
* **Practical workshop: Developing a financial dashboard for a start-up**
* **Closing session: Review of key concepts, Q&A, and individual action plans for each participant<# @ENDIF #>**<## End of the section for Day 3 ##>

### **Trainer**

<# @COPY(«Bio Note») #><## Copies biographical notes for reuse elsewhere in document ##><# @IF(trainer = «Anna Logwatch») #><## Choose the biographical note of the selected trainer ##>Ms. Anna Logwatch is an accomplished entrepreneur with more than 10 years of experience in the technology start-up sector. A graduate of Concordia University, she co-founded three successful companies, two of which were acquired by market leaders. An expert in strategic development and innovation management, Anna has helped many young companies achieve success. Passionate about sharing knowledge, she regularly conducts leadership trainings, focusing on the unique challenges of start-ups. Her pragmatic and inspiring approach makes her a sought-after and respected trainer.

<# @ELSEIF(trainer = «Élise Dupont») #>Mrs. Élise Dupont is a financial management consultant with more than 20 years of experience in start-ups. A graduate in finance from HEC Montréal, she has founded and led several start-ups, mastering financial planning, fundraising, and cash flow management. Élise is known for making financial concepts accessible and has trained many entrepreneurs. In addition to her consultations, she speaks at conferences and writes for specialized journals.

<# @ELSEIF(trainer = «Émile Lafleur») #>Mr. Émile Lafleur is an expert in start-up management, with more than 15 years of experience in the creation and growth of innovative companies. With a degree in business administration and entrepreneurship, he has founded and led several successful technology start-ups. Émile is known for his ability to develop high-performing teams and implement effective growth strategies. As a trainer, he shares his expertise in leadership, project management and start-up financing, helping new entrepreneurs navigate the challenges of the business world.

<# @ELSEIF(trainer = «Jules Smith») #>Mr. Jules Smith is a project management expert with more than 10 years of experience in the start-up industry. A graduate in business management from UQAM and a PMP certified, he has led multidisciplinary teams and orchestrated the success of several innovative technology companies. Known for his strategic planning skills and agile approach, Jules has helped many start-ups overcome complex challenges and achieve their goals. Passionate about sharing knowledge, he offers dynamic and practical training to help entrepreneurs maximize their potential and succeed in a competitive environment. <## Marks the end of the section on the trainer ##>

<# @ELSE #> <# REPORT\_ERROR(«Missing trainer : »&trainer) #><## Will report an error indicating "Missing Trainer", if the selected trainer does not have a biographical note (e.g., if a trainer was added later on, but the bio note was forgotten) ##><# @ENDIF #><# @ENDCOPY #>

<## Section to be displayed according to the training topic ##><# @ELSEIF(topic = "Leadership in Start-Up Context") #>This <# nb\_days #>-day training aims to provide participants with practical tools and in-depth knowledge to excel as leaders in the dynamic and demanding context of start-ups.

### **Target Audience**

1. Entrepreneurs
2. Start-up founders
3. Senior executives and managers of start-ups
4. Project managers and team leaders in start-up environments

### **Learning Objectives**

1. **Understand the basics of leadership in start-ups: Differentiate the specific leadership needs of a start-up compared to an established company.**
2. **Develop adaptive leadership skills: Learn techniques to quickly adapt to change and uncertainty.**
3. <# @IF(nb\_days >= 2) #><## Displays the objectives below based on the number of training days indicated ##>**Enhance communication and team management skills: Improve the ability to inspire, motivate, and manage diverse teams.** **<# @ENDIF #><## End of condition for 2 or more training days ##>**
4. **<# @IF (nb\_days = 3) #><## Start of the condition for 3 training days ##>**
5. **Learn to manage growth and change: Acquire tools to navigate rapid growth and critical phases in a start-up's lifecycle.**
6. **Develop a strategic vision and a strong company culture: Create a clear vision and consistent company culture to guide teams.<# @ENDIF #><## End of condition for 3 training days ##>**

### **Methodology**

* **Interactive sessions: A combination of theoretical presentations, group discussions, and case studies.**
* **Practical workshops: Collaborative activities and hands-on exercises to apply key concepts.**
* **Role-playing and simulations: Realistic scenarios to practice leadership skills.**
* **Coaching and feedback: Constructive feedback sessions and individual coaching to strengthen leadership capabilities**

### **Training Program**

#### <# IF(nb\_days >= 2, « DAY 1 -») #> **Leadership Fundamentals in Start-Ups**

<## If the training is 2 or 3 days, the day's content description will show the word "DAY 1 -", followed by the training day, and then the title of the content. If the training is for one day only, only the title of the content will be displayed (without the word DAY) ##>

**A.M. :**

* **Introduction and Definition of Leadership in Start-Ups**
  + Differences between leadership in start-ups and established companies
  + Key qualities and skills of a start-up leader
* **Exemples** : Inspiring start-up leadership examples

**Break**

**P.M. :**

* **Adaptive Leadership**
  + Concept of adaptive leadership
  + Techniques for navigating uncertainty and rapid change
* **Case study and practical exercises:** Fast and flexible decision-making

<# @IF(nb\_days >= 2) #><## If the training is 2 or 3 days, the content of day 2 will be displayed ##>

#### DAY 2 - Communication, Motivation, and Team Management

**A.M. :**

* **Effective Communication**
  + Assertive and empathetic communication techniques
  + Conflict management and negotiation skills
* **Communication exercises :** In teams

**Break**

**P.M. :**

* **Motivating and Inspiring Teams**
  + Theories of motivation and their application in start-ups
  + Techniques to inspire and motivate diverse teams
* **Workshop:** Creating a motivating work environmenthéories de la motivation et leur application en start-up**<# @ENDIF #>**<## End of the section for Day 2 ##>

<# @IF(nb\_days = 3) #> <## If the training is 3 days, the content for day 3 will be displayed ##>

#### DAY 3 - Managing Growth and Strategic Vision

**A.M. :**

* **Managing Growth**
  + Strategies for handling rapid growth
  + Tools for managing transitions and crises
* **Case study:** Successful start-up growth management

**Break**

**P.M. :**

* **Developing Vision and Company Culture**
  + Creating and communicating a clear strategic vision
  + Developing and maintaining a consistent company culture
* **Exercise:** Defining vision and company values
* **Summary and Action Plan**
  + Recap of key points covered during the training
  + Development of personalized action plans for each participant
  + Final feedback and Q&A session**<# @ENDIF #>**<## Marks the end of the section for Day 3 ##>

### **Trainer**

<# @PASTE(«Bio Note») #> <## Pastes the biographical note (copied into the financial management training) of the selected trainer from the ##>

<## Section to be displayed according to the training topic ##><# @ELSEIF(topic="Management in Start-Up Context") #>This <# nb\_days #>-day training is designed to provide participants with the tools and skills necessary to effectively manage a start-up. Combining theory, practice and exchange of experience, it aims to strengthen the capacity of managers to lead their teams and navigate an often uncertain and constantly changing environment.

### **Target Audience**

* **Entrepreneurs: Founders and co-founders of start-ups.**
* **Executives: Mid- to senior-level executives in start-ups.**
* **Aspiring Entrepreneurs: Professionals aiming to launch their own start-up.**
* **Investors: Investors seeking to understand the specific challenges of management in start-ups to better support leadership teams.**

### **Learning Objectives**

1. **Understanding the specificities of start-up management: Identify and comprehend the unique aspects of managing in a start-up environment.**
2. **Developing managerial skills: Learn how to manage teams, projects, and resources in a fast-growing and uncertain context.**
3. **<# @IF(nb\_days >= 2) #><## Displays the following objectives based on the number of training days ##>Strategy and Leadership: Develop leadership and strategic skills to guide the company toward its goals.**
4. **Innovation Management: Gain skills to foster innovation and creativity within the team. <# @ENDIF #><## End of condition if 2 training days ##>**
5. **<# @IF(nb\_days = 3) #><## Start condition for 3 training days ##>Communication and Motivation Techniques: Improve communication and motivation techniques to enhance team cohesion and performance. <# @ENDIF #><## End of condition for 3 training days ##>**

### **Methodology**

* **Theoretical inputs: Interactive presentations with visual aids (slides, videos).**
* **Case studies: Analysis of real and concrete start-up cases.**
* **Practical workshops: Hands-on exercises, role-playing, and simulations to apply concepts.**
* **Group discussions: Exchange and share experiences among participants.**
* **Personalized coaching: Individual or small group coaching sessions for personalized advice.**

### **Training Program**

#### <# IF(nb\_days >= 2, «DAY 1 - ») #> Introduction and fundamentals of start-up management

<## If the training is 2 or 3 days, the day's content description will show the word "DAY 1 -", followed by the training day, and then the title of the content. If the training is for one day only, only the title of the content will be displayed (without the word DAY) ##>

**A.M. :**

* **Specificities of start-up management**
  + **Differences between start-ups and traditional companies**
  + **Specific challenges (rapid growth, uncertainty, limited resources)**
* **Case studies: Start-up successes and failures**

**Break**

**P.M. :**

* **Basics of agile management**
  + **Principles of agility**
  + **Agile techniques and tools (Scrum, Kanban, Lean Startup)**
* **Practical workshop: Agile sprint simulation**
* **Team management in start-ups**
  + **Recruitment and talent management**
  + **Creating a strong and innovative corporate culture**
* **Case study: Corporate culture in a successful start-up**
* **Closing session: Q&A and group discussions**

<# @IF(nb\_days >= 2) #>

#### DAY 2 - Strategy, leadership, and innovation

**A.M. :**

* **Strategy development for start-ups**
  + **Developing the vision and mission**
  + **Strategic planning in an uncertain context**
* **Workshop: Defining the vision and mission of your start-up**
* **Leadership in start-ups**
  + **Leadership styles suited to start-ups**
  + **Quick decision-making techniques**
* **Case study: Transformational leadership in a start-up**

**Break**

**P.M. :**

* **Innovation and creativity management**
  + **Methods to stimulate innovation (Design Thinking, brainstorming)**
  + **Creating an environment conducive to creativity**
* **Practical workshop: Design Thinking**
* **Risk management and strategic pivots**
  + **Identifying and assessing risks**
  + **Techniques for quickly pivoting if needed**
* **Case study: Successful pivots in start-ups**
* **Closing session: Q&A and group discussions<# @ENDIF #>**<## End of day 2 section ##>

<# @IF(nb\_days = 3) #><## If the training is 3 days, the content of day 3 will be displayed ##>

#### DAY 3 - Communication, motivation, and development

**A.M. :**

* **Effective communication in start-ups**
  + **Internal and external communication techniques**
  + **Use of modern communication tools**
* **Workshop: Crisis communication simulation**
* **Team motivation and engagement**
  + **Strategies to motivate and retain employees**
  + **Creating a positive work atmosphere**
* **Case study: Motivation programs in a start-up**

**Break**

**P.M. :**

* **Change management**
  + **Supporting teams through change**
  + **Techniques to overcome resistance to change**
* **Practical workshop: Change management plan for a concrete project**
* **Coaching and personal development for executives**
  + **Importance of personal development for executives**
  + **Coaching and self-coaching techniques**
* **Personalized or small group coaching**
* **Closing:**
  + **Training summary**
  + **Skills assessment**
  + **Participant feedback<# @ENDIF #>**<## End of day 3 section ##>

### **Trainer**

<# @PASTE(«Bio Note ») #><## Pastes the biographical note (copied into the financial management training) of the selected trainer from the list ##>

<# @ELSEIF(topic="Project Management in Start-Up Context") #><## Section to be displayed according to the chosen training theme ##>This one-day training aims to equip experienced project managers with the tools and knowledge necessary to succeed in a start-up environment. With a balance between theory and practice, participants will be able to quickly adapt their skills to the unique specificities and challenges of start-ups.

**Target Audience**

* Project Managers

### **Learning Objectives**

* **Understand the specifics of project management in start-ups**
* **Identify and apply agile methods tailored to start-ups**
* **Adapt traditional project management skills to the dynamic and uncertain context of start-ups**
* **Master the tools and techniques used in project management within start-ups**

### **Methodology**

* **Theoretical presentations to introduce key concepts**
* **Case studies to analyze real-life situations and discuss solutions**
* **Practical workshops to apply concepts in a simulated environment**
* **Discussions and exchanges to share experiences and best practices**

### **Training Program**

**A.M. :**

* **Welcome and Introduction**
  + Presentation of the training objectives
  + Participant introductions: experience sharing and expectations
* **Differences Between Project Management in Enterprises and Start-Ups**
  + Organizational structure: hierarchy vs. flexibility
  + Resources: abundance vs. constraints
  + Company culture: stability vs. innovation and risk-taking
  + Development cycles: long cycles vs. rapid iterations
* **Examples**: Differences in typical projects
* **Introduction to Agile Methods in Start-Ups Introduction aux méthodes agiles en start-up**
  + Agile principles: the agile manifesto and its values
  + Scrum: roles, events, and artifacts
  + Kanban: visualizing work, managing flow
  + Comparison with traditional methods: pros and cons **Principes de l’agilité** : manifeste agile et ses valeurs
* **Case Study:** Transitioning to Agility in a Start-Up

**Break**

**P.M. :**

* **Tools and Techniques for Project Management in Start-Ups**
  + Project management tools: Trello, Asana, Jira, Slack, etc.
  + Prioritization techniques: MoSCoW, Eisenhower matrix, backlog grooming
  + Performance measurement: start-up specific KPIs, OKRs
* **Practical Workshops**
  + **Sprint Planning Simulation**: defining user stories, estimating, and prioritizing
  + **Kanban Workshop**: setting up a Kanban board and managing workflow
  + **Agile Retrospective**: analyzing an iteration, identifying areas for improvement
* **Discussion and conclusion**
  + Feedback on the practical workshops
  + Q&A: responding to participant questions, clarifying concepts
  + Summary of key points from the day

### **Trainer**

<# @PASTE(«Bio Note») #><## Pastes the biographical note (copied into the financial management training) of the selected trainer from the list ##>

<# @ELSE #><# REPORT\_ERROR(«Missing Training: »&topic) #><## Will report an error indicating "Missing Training", if the selected Topic does not have a content (e.g., if a topic was added later on, but the content was forgotten) ##><# @ENDIF #><## End of sections on the choice of the topic of the training ##>

<## The text below allows you to configure the form to be completed when preparing and using the document ##>

<# @LANGUAGE("en") #><## Specifies the language of the document (necessary for functions that automatically determine the month and year used in the header) ##>

<# @PICK\_ONE\_QUESTION(topic, label : « Training topic», help\_text: « This is the topic of the training», initial\_value : «Leadership in Start-Up Context», choices : [«Financial Management in a Start-Up Context», «Project Management in Start-Up Context», «Leadership in Start-Up Context» , «Management in Start-Up Context»]) #><## Creates a drop-down list to choose the topic of the training in the form. First gives the label to display, then the help text if needed (help\_text), the default value (initial\_value), then the 4 choices of topic ##>

<# @TEXT\_QUESTION(client, label : «Client Company Name», initial\_value : «Incubator Go Start-Up») #><## Creates a text field to be filled in with the name of the client company. Gives the label to be displayed in the form first, then the default value when preparing the template and using it (initial\_value) ##>

<# @TEXT\_QUESTION(city\_client, label : «City of the client», example\_value : «Marseille») #><## Creates a text field to be filled in by the city of the client company. First gives the label to display in the form (label), then a default value to display when preparing the template (example\_value) ##>

<# @TEXT\_QUESTION(country\_client, label : «Country of the client», example\_value : «France») #><## Creates a text field to be filled in by the country of the client company. First gives the label to display in the form (label), then a default value to display when preparing the template (example\_value) ##>

<# @TEXT\_QUESTION(nb\_participants, label : «Number of anticipated participants», example\_value : «15 to 20», help\_text : «Indicate the number of anticipated participants, e.g. “”15 to 20”” or ““a maximum of 25””») #><## Creates a text field to be filled in with the number of participants in the training. First gives the label to display in the form (label), a default value to display when preparing the template (example\_value), and then the text to display for help when needed (help\_text) ##>

<# @ PICK\_ONE\_QUESTION (format, label : «Training format», example\_value : «Face-to-face», choices : [«Face-to-face», «Remotely»]) #><## Creates a drop-down list to choose the format of the training in the form. First gives the label to display in the form (label), a value to display by default when preparing the template (example\_value), then the 2 possible choices (choices) ##>

<# @NUMBER\_QUESTION(nb\_days, label : «Training duration in days», help\_text: «1, 2 or 3 days», example\_value : 1, placeholder: 2 ) #><## Creates a "number" field to be filled in with the duration of the training. First gives the label to display in the form (label), the help text if needed (help\_text), a default value to display when preparing the template (example\_value), and then the text to be displayed grayed out in the area when it is empty (placeholder). Using @NUMBER\_QUESTION, instead of @TEXT\_QUESTION, allows this number to be used in number-related operations and functions. ##>

<# @PICK\_ONE\_QUESTION(trainer, label : «Choose the trainer», example\_value : «Élise Dupont », choices : [«Anna Logwatch», «Élise Dupont», «Émile Lafleur», «Jules Dubois»]) #><## Creates a drop-down list to choose from the form who will give the training. First gives the label to display in the form (label), a default value to display when preparing the template (example\_value), then the 4 possible choices (choices) ##>

<# @FILENAME(CONCAT(topic, «\_», client,«\_»,TEXT(TODAY(), "mmm yyyy"))) #>   
<## Save the document as formation\_Client\_mois Current Year Name ##>