

INTERNATIONAL CERTIFICATION

CERTIFIED ORGANISATION PERFORMANCE ANALYST (COPA)

From Organisational Performance to Sustainable Value Creation

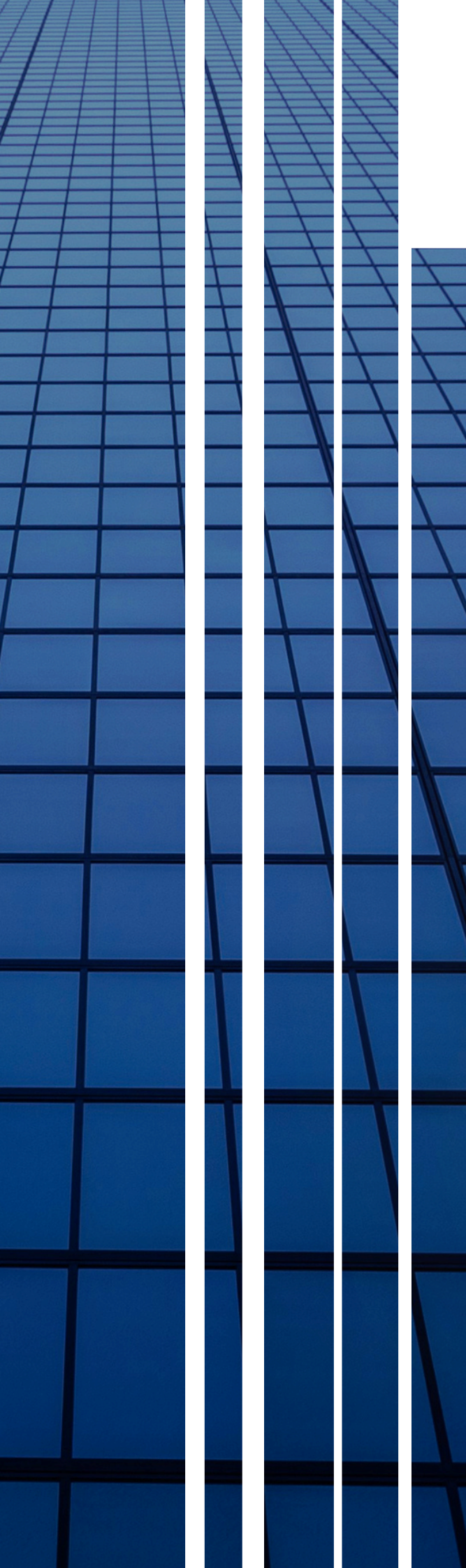


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Introduction

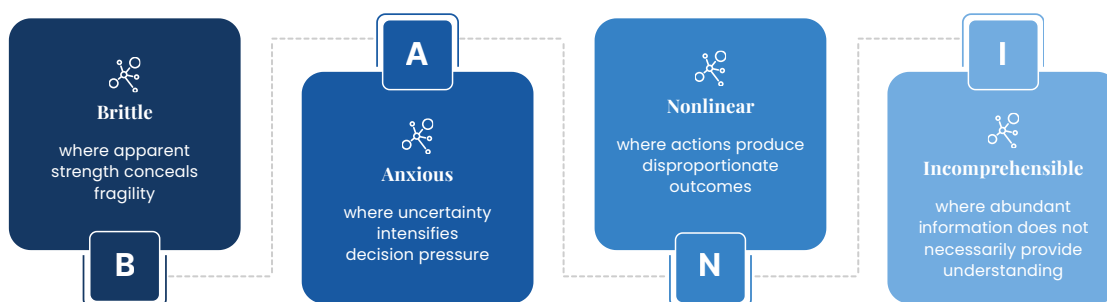
WHAT IS COPA?

In an era of disruption, leaders need COPA competencies to redefine organisational performance, assess it from multiple perspectives, and drive sustainable value creation.

Your organisation is performing well. **According to whom? Does today's performance build the foundations for sustainable growth? Is it creating a lasting organisational legacy, or does success remain dependent on the leader who drives it?**

Rising profits can coexist with disappointed customers and declining employee support. Individual targets can be achieved while organisational objectives remain unmet. Growth can accelerate without developing the capabilities required to sustain it.

These tensions become more consequential in the BANI era, which brings greater challenges to leading in an era of disruption.



COPA is an AFMA Australia certification programme that equips professionals, leaders, and owner to examine organisational performance comprehensively. Participants assess value creation for shareholders, customers, and employees, and evaluate how leadership transforms their synergy into organisational capabilities, processes, and systems. Develop the competence to turn today's achievements into organisational strength that sustains growth and endures beyond individual leadership.



Why COPA Matters?

“ Organisations performance is an iceberg. How much of it are you actually seeing?

Above the surface are profit, revenue, and achieved targets. Beneath them lie employee capabilities, customer trust, leadership, mindset, culture, architecture, and organisational systems. Strong results can conceal fragile foundations. Similar profits can come from sustainable competitive advantage or temporary opportunities, deferred investment, and dependence on a single leader.

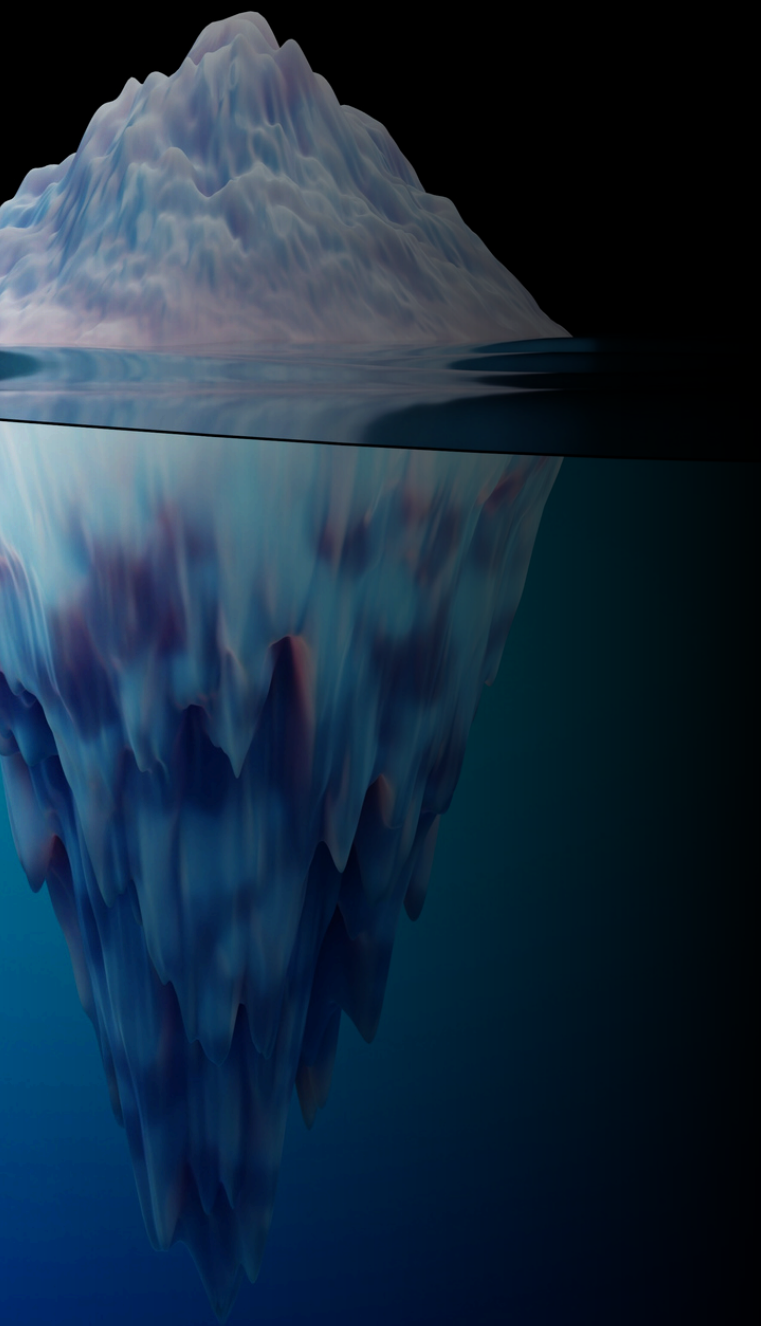
COPA develops the competencies to examine beneath the surface and determine whether today's results advance the organisational mission, sustain future growth, and build a lasting legacy.

THE COPA VALUE CREATION FRAMEWORK

Looking beneath the iceberg means understanding whose value is being created, how that value circulates, and how leadership turns it into lasting organisational strength.

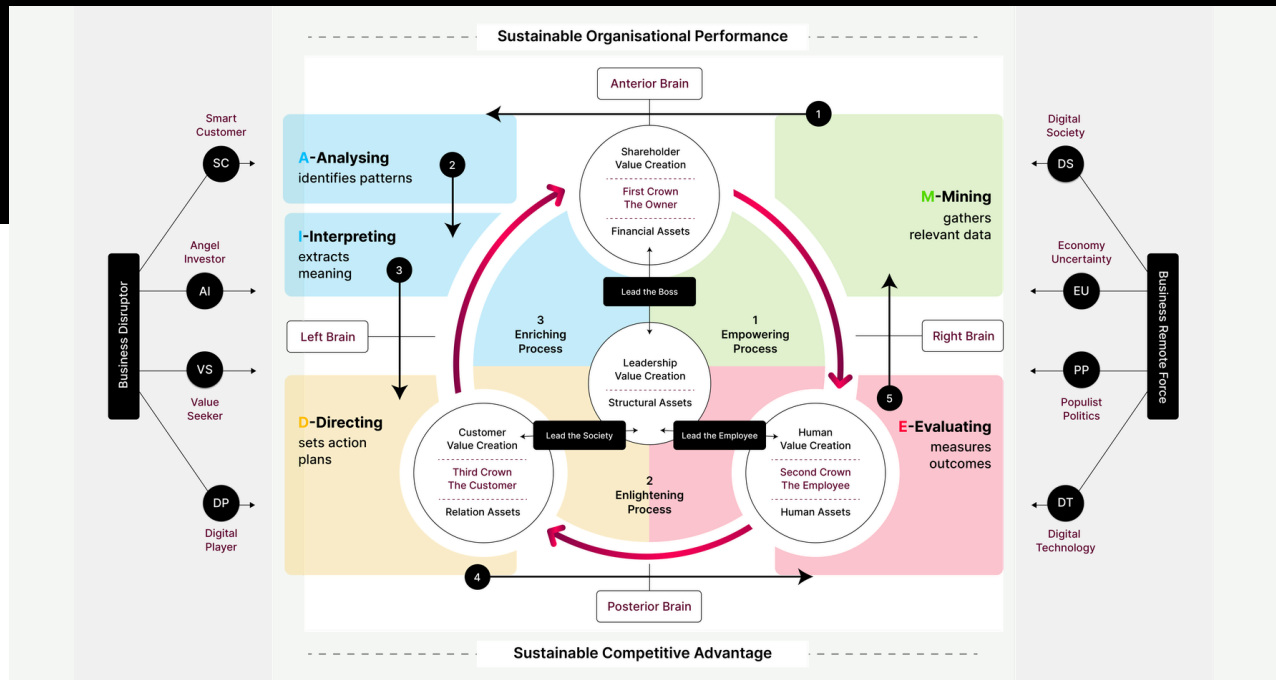
COPA places shareholders, customers, and employees at the centre of the Triple Crown of Value Creation. They form Ring 1, the organisation's primary stakeholder foundation. Sustainable organisational performance requires value creation for all three to reinforce one another. Financial assets provide evidence or measures of shareholder value creation, relational assets of customer value creation, and human assets of employee value creation.

Contributions to Ring 2 stakeholders, including communities, government, NGOs, and suppliers, require this foundation to remain healthy. Broader contributions cannot compensate for disappointed customers, neglected employees, or deteriorating business viability.



HOW IT OPERATES?

The Triple Crown



The Triple Crown operates through the Circle of Value Creation. Owners empower employees through resources, development, trust, and authority. Empowered employees enlighten customers by helping them understand their needs, make informed choices, and achieve better outcomes. Customers who receive value enrich owners, providing resources for renewed empowerment and organisational development.

COPA examines whether these connections work: does empowered employee create customer value, does customer value enrich owners, and does owner value strengthen the next cycle?

Leaders orchestrate this circle with precision and speed through three connected roles:

- **Lead the Boss**
to strengthen shareholder value creation
- **Lead the Employee**
to strengthen human value creation
- **Lead the Society**
to strengthen customer value creation

Their responsibility is to make these contributions work together consistently. An aligned organisational mindset establishes a shared direction. Effective organisational architecture connects people, responsibilities, decisions, and authority. Performance management System aligns individual objectives, actions, and rewards with organisational objectives.

Through this orchestration, leaders connect financial, human, and relational assets into a lasting organisational capability, supported by an aligned mindset, effective architecture, and performance management system. This capability constitutes structural assets, which are the organisation's ability to keep the Circle of Value Creation operating with precision and speed, sustaining value creation beyond an individual leader.

COPA assesses whether leaders are building this enduring capability: Are leaders building an organisation that can repeat, improve, and sustain value creation beyond their direct involvement?

Organisational Assets & Market Value

“ Why can two companies with similar profits have very different market values?

Investors assess their ability to create value in the future. Within the COPA framework, that ability is examined through four organisational assets.

→ Financial assets

demonstrate financial strength and provide resources for investment.

→ Relational assets

support future business through customer trust, loyalty, and valuable relationships.

→ Human assets

provide the employee capabilities needed to execute strategy and innovate.

→ Structural assets

enable these strengths to work together consistently through organisational mindset, architecture, processes, and performance management.

Together, these assets influence expected future returns, growth potential, and risk. This explains why current profit alone cannot fully explain a company's market value. Market value reflects how investors judge the future value these assets can create together.

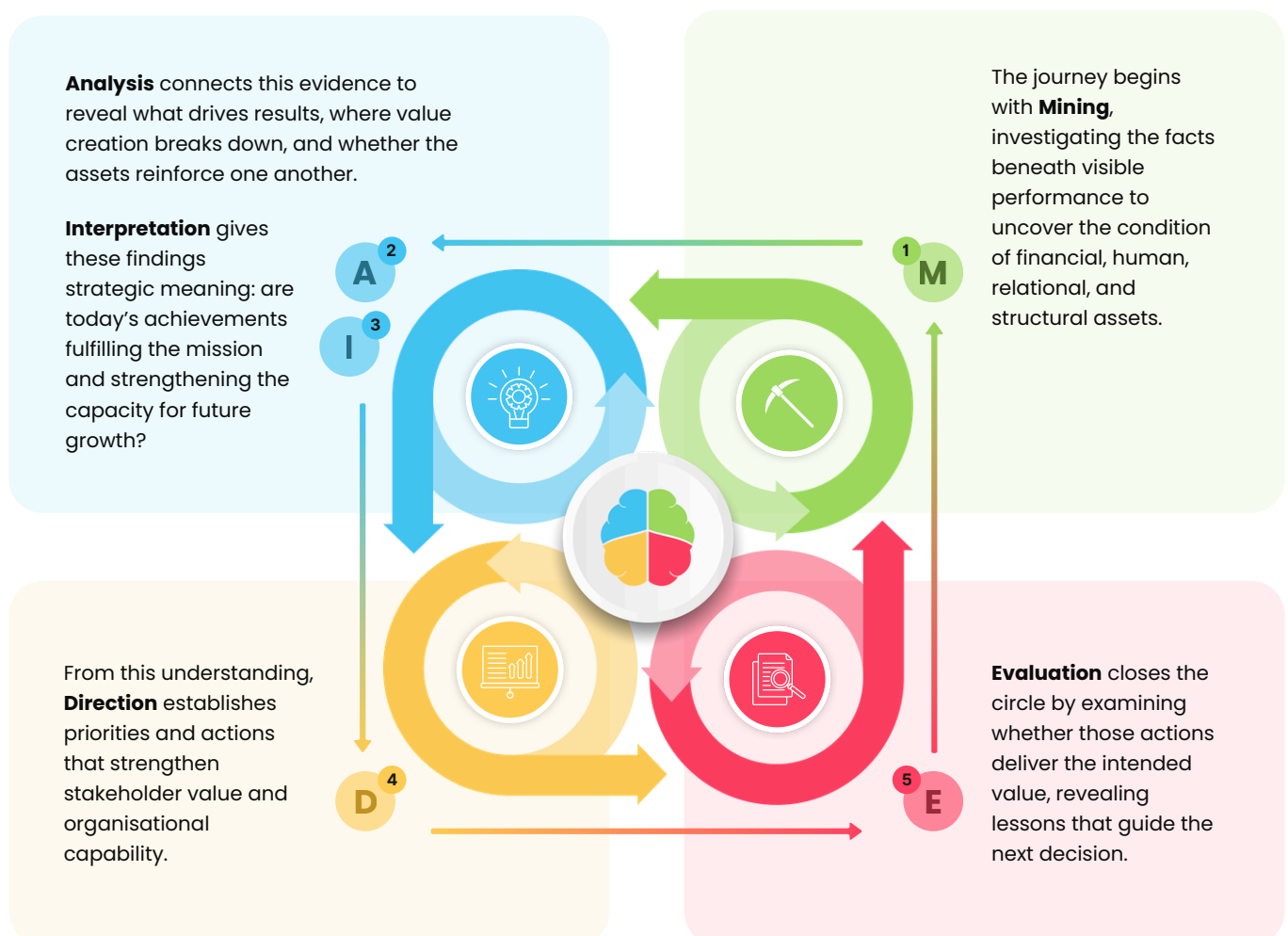
FROM EVIDENCE TO LASTING VALUE

MAIDE

“ Understanding organisational assets is only the beginning. How can leaders turn that understanding into decisions that shape the organisation’s future?”

COPA DEVELOPS MAIDE:

Mining, Analysis, Interpretation, Direction, and Evaluation to connect evidence with judgement, action, and improvement.



FROM EXPERIENCE TO TRANSFORMATION

The Learning Journey

“ How can professional experience become stronger judgement and better organisational decisions?”

COPA's twelve modules combine learning materials, case discussions, and practical worksheets in an adult learning journey that draws on participants' experience and challenges them to rethink how they assess organisational performance.

The journey begins with Modules 1–4, examining shareholder value creation and financial assets. Modules 5–8 explore customer value creation and relational assets. Modules 9–12 connect employee and leadership value creation with human and structural assets.

They build a comprehensive understanding of organisational performance. Learning materials introduce concepts and analytical tools. Cases challenge participants to weigh evidence, examine competing perspectives, and exercise judgement. Worksheets guide the application of MAIDE, turning insights into structured analysis and actionable recommendations. Participants learn to see their organisations differently, question familiar decisions, and translate experience into action that strengthens sustainable value creation.



THE LEARNING JOURNEY

Day One

SHAREHOLDER VALUE CREATION AND FINANCIAL ASSETS

Do financial achievements create shareholder value and strengthen the organisation's future?

Day One develops the competencies to assess business health, economic value, and the strategic sources of profit. Through learning materials, case discussions, and practical worksheets, participants apply MAIDE to guide decisions about capital, growth, and competitive advantage, strengthening their ability to Lead the Boss.

Module 1

Organisational
Performance
Today

Redefine success and uncover the foundations that sustain it.

Participants examine organisational performance in the BANI era through a beyond profit perspective and iceberg thinking. They connect visible achievements with customer relationships, employee capabilities, leadership, and organisational systems to determine whether today's results fulfil the mission and build the capacity for sustainable growth. If your organisation looks successful today, how would you discover whether it is building lasting strength or concealing future fragility?

Module 2

Financial
Statement
Analysis

Turn financial information into an understanding of business health.

Participants connect operating results, financial position, and cash flows to assess liquidity, solvency, profitability, effectiveness, and efficiency. They investigate whether revenue growth generates cash, whether profit rests on sound operations, and whether the organisation can meet obligations and fund its strategy. This understanding guides decisions about working capital, funding, and resource utilisation. If revenue and profit are rising, why might your organisation still struggle to pay its obligations and could you identify the warning signs?

Module 3

Market Value Added Analysis

Assess whether capital earns sufficient returns and builds future value.

Participants examine Economic Value Added (EVA) to determine whether operating returns exceed the cost of capital, then explore Market Value Added (MVA) and the relationship between market price, assessed value, and investor expectations. They consider how financial, human, relational, and structural assets support those expectations, strengthening judgement about investment and expansion. Could a profitable expansion destroy shareholder value and how would you judge whether its expected returns justify the capital committed?

Module 4

Strategic Profitability Analysis

Identify what drives profit and whether it strengthens competitive advantage.

Participants analyse the contributions of productivity, price recovery, and growth to changes in profit. They connect these findings with cost leadership and differentiation to assess whether profitability reflects a coherent strategic position. The analysis guides priorities for productivity, pricing, and growth while examining their consequences for customer and employee value creation. If profit increased, could you explain how much came from productivity, price recovery, or growth and which driver you should strengthen next?

THE LEARNING JOURNEY

Day Two

CUSTOMER VALUE CREATION AND RELATIONAL ASSETS

Do customers receive superior value, and do their relationships strengthen the organisation's future?

Day Two develops the competencies to assess customer value, customer profitability, product performance, and brand value. Through learning materials, case discussions, and practical worksheets, participants apply MAIDE to guide customer, product, and brand decisions, strengthening their ability to Lead Society.

Module 5

Customer Value Creation Analysis

Understand value through the customer's eyes.

Participants assess the benefits of products, services, and brands against customer sacrifices, including price, time, effort, and risk. Comparison with competitors reveals gaps between organisational assumptions and customer priorities. Participants identify the customer value sweet spot, where what customers value most meets what the organisation can deliver distinctively, and explore blue ocean opportunities to create new value beyond existing competition.

The findings guide improvements that enlighten customers through better understanding, informed choices, and meaningful outcomes. Where is your customer value sweet spot and could it open a blue ocean that gives customers compelling new reasons to choose you?

Module 6

Customer Profitability Analysis

Discover which customer relationships create lasting economic value.

Participants use Customer Lifetime Value (CLV) to examine revenue alongside acquisition, service, and retention costs throughout a relationship. They identify opportunities to develop valuable relationships and reconsider arrangements that consume resources without sufficient returns. This connects enlightening customers with enriching owners and guides customer priorities, service decisions, and investment. Could your biggest customer generate substantial revenue yet contribute little value and how would that change your customer strategy?

Module 7

Product Performance Analysis

Assess whether products build relationships that can endure and evolve.

Participants examine products through the birth, growth, mature, and dying stages, assessing customer enthusiasm, the fit between quality and customer needs, and continuing relevance. They evaluate whether marketing activities build relational assets and whether demand rests on meaningful benefits or continuing incentives. Findings guide product investment, improvement, positioning, and portfolio renewal. Are customers choosing your product for its value, or mainly for its incentives—and how would you know when to invest, renew, or withdraw it?

Module 8**Brand Value
Analysis****Connect the brand's promise with customer experience and economic value.**

Participants explore brand valuation approaches that connect financial outcomes with marketing performance. They examine how trust, loyalty, and perceived quality contribute to brand value, and whether customer experience fulfils the brand's promise.

The analysis guides brand investment and reveals how relational assets contribute to organisational market value. Your brand may be widely recognised, but what makes it valuable, and does the customer experience justify that value?

THE LEARNING JOURNEY

Day Three

HUMAN VALUE CREATION AND LEADERSHIP VALUE CREATION

Does your organisation offer a compelling employee value proposition and can its leaders make the Circle of Value Creation operate with precision and speed?

Day Three connects two responsibilities. Module 9 examines Human Value Creation and human assets, strengthening the competence required to Lead the Employee. Modules 10–12 assess Leadership Value Creation through leaders' ability to build structural assets that keep the Circle of Value Creation operating with precision and speed.

Through learning materials, case discussions, and practical worksheets, participants apply MAIDE to assess human assets and determine whether leadership is building lasting organisational capability.

Module 9

Human Value Analysis

Assess whether your employee value proposition builds the human assets required for sustainable performance.

Participants examine Human Value Creation through empowerment resources, development, trust, authority, and support and employment working conditions and opportunities. They assess whether employees' actual experience fulfils the employer brand promise and use external benchmarking to evaluate competitiveness.

HR practices are examined through their contribution to Human Value Creation and the capabilities employees need to enlighten customers and enrich owners. You expect employees to deliver superior customer value, but why should capable people choose your organisation, stay, and grow with it?

Module 10

Organisational Mindset Analysis

Assess leaders' ability to align how the organisation thinks.

Participants map strategic thinking, leadership, power, culture, control, and organisational learning to examine their consistency. Promoting innovation while penalising experimentation, for example, creates conflicting signals that weaken execution. The analysis reveals whether leaders are building an organisational mindset that aligns decisions, behaviour, and learning around the Triple Crown. Does your organisation's everyday thinking reinforce its strategic direction—or undermine the value its leaders intend to create?

Module 11

Organisational Architecture Analysis

Assess leaders' ability to turn aligned thinking into coordinated execution.

Participants examine hierarchy, grouping, linkage, decision, and authority, looking beyond the organisation chart to how work and decisions operate. They identify where disconnected functions, delayed approvals, or authority gaps constrain the Circle of Value Creation. The findings guide architectural improvements that enable resources, employee capabilities, and customer relationships to work together effectively. Does your architecture help people create value quickly and precisely or force capable employees to work around the organisation?

Module 12

Strategic Performance Management System

Assess leaders' ability to align individual achievement with organisational success.

Participants apply IMAC: Important, Measurement, Action, and Compensation to connect mission and strategic priorities with objectives, measures, actions, and rewards. They examine whether individual targets reinforce the Triple Crown or encourage conflicting behaviour.

The analysis guides the development of SPMS as a structural asset that directs, coordinates, and rewards contributions to organisational performance. If everyone achieves their targets, will the organisation succeed or could its performance system reward actions that weaken collective value creation?

Leadership Value Creation: Building Structural Assets

Modules 10–12 assess leadership through the organisation it builds. Organisational mindset aligns thinking, architecture coordinates execution, and SPMS aligns objectives and contributions. Together, these structural assets enable financial, human, and relational assets to reinforce one another.

The result is a Circle of Value Creation in which owners empower employees, employees enlighten customers, and customers enrich owners with precision and speed. Are your leaders building structural assets that keep this circle moving beyond their direct involvement and turn organisational performance into a lasting legacy?

Why Pursue COPA Certification?

SEE DEEPER. DECIDE BETTER. CREATE LASTING VALUE.

“ You know your function. Can you **assess what makes the whole organisation succeed** and whether that success will endure? You know your function. Can you **diagnose the health of the whole organisation** and determine what will strengthen its future?

COPA equips you to become a “corporate doctor”: a professional who looks beneath visible results, diagnoses organisational challenges, identifies their underlying causes, and recommends informed action.

Through MAIDE across Shareholder, Customer, Human, and Leadership Value Creation, you learn to assess financial, relational, human, and structural assets and determine what keeps the Circle of Value Creation operating with precision and speed.

For professionals, this turns expertise into strategic influence. For leaders, CEOs, and owners, it strengthens judgement about investment, growth, and the capabilities needed to sustain success.

Pursue COPA certification. Develop the competence to diagnose organisational health, guide transformation, and turn today’s achievements into a lasting legacy. Certification is awarded to participants who meet the programme’s requirements.

THANK YOU

Should you have any questions about the COPA programme or its syllabus, please do not hesitate to contact us. We would be pleased to assist you.



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