



CERTIFIED PROFESSIONAL BOOKKEEPERS OF CANADA

Strategic Plan 2025 - 2028



Introduction

The Certified Professional Bookkeepers of Canada (CPB Canada) is an expanding professional association on the brink of celebrating its 20th anniversary. The association is poised for growth and expanded influence for the bookkeeping profession, while also making a significant impact in the wider industry. Come join us as we forge a path towards a more vibrant and prosperous future for all bookkeeping professionals in Canada.

Strategic Plan Development

Over the course of two days, the Board of Directors of CPB Canada engaged in a transformative retreat with Dr. JP Gedeon, focusing on shaping the future of our professional association and defining its strategic identity. This process focused on how we prepare to enter a significant expansion phase.

The Board acknowledged that clarity of direction, proactive initiatives, and a robust organizational culture are vital for operational excellence, attracting new members, and elevating our marketplace presence.

In response to the strategic direction, the operational staff commenced the alignment of our new corporate identity to ensure a consistent approach throughout our operations. Dr. Gedeon facilitated a session to align our strategic goals with operational planning for the upcoming years.

This document presents our high-level Strategic Plan for 2025-2028, featuring refined Vision and Mission statements that reflect our updated corporate identity. Each year, we will develop our operating budget, objectives, and key results (OKRs) in harmony with the strategic priorities defined in this plan, setting the stage for a dynamic and aligned future.

CPB Canada Vision & Mission

Our Vision

A connected community elevating the accounting profession.



Our Mission

Our mission is to empower the profession through leadership, learning, and advocacy.

We set the highest standards for professional competence and conduct to cultivate success and promote continuous growth within our community.



Strategic Priorities



Define the "Modern Bookkeeper."

Develop communications, branding, and corporate storytelling to highlight the profession, inspire value, and establish the association's position in the marketplace.



Enhance programming, credentials, designations, and standards to meet the definition of the Modern Bookkeeper.

Build an advocacy agenda to increase the association's positioning, visibility, and influence.



Diversify membership across the industry ecosystem.

Encourage a relationship-based and partnership approach to build organizational capacity.



Align organizational structures, functions, and policies with top-tier standards and consistent identity.