

THE CFO OPERATING SYSTEM

The Capital Architect Fellowship

Program Syllabus & Certification Standard

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Credential awarded: Certified Capital Architect (CCA)

1. Program Overview

The Capital Architect Fellowship is the practitioner program of The CFO Operating System and the hands-on companion to Book Two: Raise. Sell. Scale. It teaches the deal layer of finance — valuation, earnings quality, diligence, liquidity, and exit mechanics — through seven video modules, six working Excel instruments, and one capstone deliverable: the Exit Memo.

The premise of the program, stated once and proven repeatedly: capital moves toward clarity. Businesses are bought, funded, and financed on how clearly their numbers can be seen, trusted, and defended — and the Fellowship trains the person who produces that clarity.

Who this program serves

- Finance professionals — accountants, controllers, and fractional CFOs adding transaction work to their practice.
- Owners and CEOs — operators who intend to command their own table in a raise, sale, or acquisition.
- Buyers and searchers — anyone evaluating a business with their own money on the line.

The tools do not care which chair you sit in. The numbers work the same in every chair.

2. Curriculum Map

Modules are taught in the order below. Module 7 — the Exit Memo — is the capstone and is completed last, after Module 8, because it synthesizes every prior output including the cap table.

#	Module	Instrument (Excel)	Core skill	Deliverable
1	The Capital Architect Method	— (orientation)	The map: premise, Three Doors, Deal Stack	Shadow company + 'name its door' paragraph
2	Valuation Snapshot	01_Valuation_Snapshot.xlsx	Triangulate value: comps, multiples, DCF	Valuation range + written rationale
3	Unit Economics Dashboard	02_Unit_Economics_Dashboard.xlsx	LTV:CAC, churn, Rule of 40	12-month story + investor narrative
4	Quality of Earnings	03_Quality_of_Earnings.xlsx	Normalize EBITDA; document add-backs	QoE report + defense statement
5	Due Diligence Tracker	05_Due_Diligence_Tracker.xlsx	Readiness scoring; red-flag remediation	Readiness score + 90-day action plan
6	13-Week Cash Flow Forecast	04_13Week_CashFlow_Forecast.xlsx	Weekly liquidity; Cash Conversion Cycle	13-week model + 3-sentence buyer briefing
8	Cap Table & Exit Waterfall	06_Cap_Table_Exit_Waterfall.xlsx	Preferences, dilution, proceeds at exit	Cap table + crossover-point analysis
7	The Exit Memo (Capstone)	All six instruments	Synthesis: six answers, one argument	Complete Exit Memo + 1-page narrative

Estimated commitment: approximately 2 hours per module (~ 25 minutes of video, the remainder hands-on in the file), 16–20 hours total including the capstone.

How every module runs

Each module follows the same six-segment rhythm: (1) the Hook — the dollar impact in one sentence; (2) the Purpose — when a real deal uses this tool; (3) Walk the Tool — every tab and formula in plain English; (4) the Live Scenario — SampleCo LLC's numbers move in real time; (5) the Punch Line — the business insight; (6) Your Exercise. One fictional company, SampleCo LLC, travels through every module so the student watches a single deal assemble end to end.

The study rule, enforced throughout: never watch without the file open. The learning is in the student's hands, not their eyes.

3. Certification Standard

The credential Certified Capital Architect (CCA) is earned, not attended. Four verbs govern it:

- WATCH — complete all seven module sessions, in the published order. The stack builds; the order matters.
- WALK — open each Excel instrument during the session and follow every step live in the file.
- DO — complete each module's exercise on the assigned scenario.
- SUBMIT — turn in all seven exercises plus the capstone Exit Memo for review.

The grading standard

Every submission is measured against one rule: it must show correct mechanics AND a written interpretation — the number, and what the number means. A technically perfect model with no interpretation does not certify. Architects who can compute but cannot explain are calculators, and the market already has calculators. The interpretation is the profession.

The certification portfolio

- Seven module exercises (Modules 1–6 and 8), each with its written interpretation.
- The capstone Exit Memo — all six sections, built on the student's shadow company — plus a one-page narrative: top three findings, recommended door, timeline, and what must be fixed first.
- Review turnaround: written feedback on every submission; capstone review within ten business days.

The award

Graduates receive the Certified Capital Architect digital certificate, the credential language for LinkedIn ("Certified Capital Architect — The CFO Operating System"), and listing in the Fellowship's practitioner directory as it launches. The credential is permanent; there is no renewal fee.

4. Formats & Founding Pricing

	Self-Paced Certification	Live Cohort
Founding price	\$997	\$2,500
All 7 video modules + 6 Excel instruments	Included	Included
SampleCo scenario files & exercises	Included	Included
Written feedback on all submissions	Included	Included
Weekly live sessions with Randy (6 weeks)	—	Included
Live capstone review & defense	—	Included
Cohort community & peer review	—	Included
CCA credential upon completion	Included	Included

Founding pricing applies to the first cohort and the first fifty self-paced enrollments; standard pricing thereafter is \$1,997 self-paced and \$5,000 cohort.

5. Requirements & Enrollment

- Microsoft Excel or Google Sheets on a computer (not a phone).
- The CFO Operating System, Parts One and Two — the program's reference texts.
- No prior deal experience required. The program assumes financial literacy, not transaction history.

To enroll or apply for the founding cohort: rclinkscale@remotecfoservices.com · calendly.com/rclinkscale/30min · remotecfoservices.com/fellowship

— *Randy Clinkscale, MBA · Columbia Business School CFO Certified · Author, The CFO Operating System*