PATERSON
CONSULTING

FUNDED ADVISORY SUPPORT FOR CANADIAN SMEs

The CMC-Canada Management Advisory Services Program

An engagement menu for business owners and executives — and how to have your project led by Wesley Paterson, CMC, an award-winning Certified Management Consultant with national and international recognition for MAS work.

40	1–3	100%	Yours
hours of advisory support in a typical project	months from kickoff to final deliverables	Certified Management Consultant delivery	to request — name your consultant directly

Wesley Paterson, CMC • President, Paterson Consulting Inc. • Medicine Hat, Alberta
1-403-928-9606 • wes@patersonconsulting.ca • patersonconsulting.ca

THE PROGRAM

A funded way to bring senior advisory capability into your business

The Management Advisory Services (MAS) Program is administered by CMC-Canada and funded through the National Research Council of Canada Industrial Research Assistance Program (NRC-IRAP). It gives eligible small and medium-sized Canadian enterprises access to structured business management advice from a Certified Management Consultant (CMC) — with consulting fees covered through the program and only a modest client administration fee.[1,2]

Who it is for	Incorporated, profit-oriented Canadian small and medium-sized enterprises — typically technology, manufacturing, industrial and innovation-driven firms working with an NRC-IRAP Industrial Technology Advisor (ITA).[2]
Project size	A typical MAS project is scoped at 40 hours of CMC advisory time. CMC-Canada confirms the allocation after reviewing your request.[1,2]
Timeline	Most 40-hour engagements are delivered over one to three months — long enough for real analysis and decisions, short enough to keep momentum.
What you receive	Custom deliverables: documented analysis, advice, tools and resources tailored to your company, agreed between you and your consultant.[1]
How it is delivered	Regular contact with your CMC. Paterson Consulting delivers these engagements remotely by default — video working sessions, remote interviews and shared working documents — so location is never the constraint. On-site sessions are available where they add value.[1]
Your cost	Consulting fees are covered under the NRC-IRAP / CMC-Canada agreement. The client pays a modest administration fee.[1,2]

Where MAS advice is most often applied

Strategy and business planning • growth management • commercialization and go-to-market • profitability and productivity • governance and leadership • financing readiness • marketing and sales • operational and organizational roadblocks to scale.[1,2]

> "Wes's common-sense, practical advice has helped us regain focus. His ability to simplify complex scenarios has been as valuable as his networking list. We will continue to work with Wes and highly recommend him to any organization requiring an objective perspective."
>
> Emma Scott — Founder, Intelligent Shaping[3]

1. CMC-Canada, Management Advisory Services (MAS) Program Guide (program document provided to clients) — https://www.cmc-canada.ca/
2. Paterson Consulting Inc., "Services — Management Advisory Service (MAS) Program" — https://patersonconsulting.ca/services/
3. Paterson Consulting Inc., "Results & Testimonials" — https://patersonconsulting.ca/testimonials/

THE PATH

How a MAS project comes together

01 **Talk with your ITA**
You and your NRC-IRAP Industrial Technology Advisor confirm the management issue and submit the MAS referral form to CMC-Canada.[1]

02 **Pay the administration fee**
Once the fee is paid, CMC-Canada posts your request for review by Certified Management Consultants.[1]

03 **Review a shortlist**
CMC-Canada provides a list of three CMCs for you to interview — generally within about three weeks, depending on consultant availability and interest.[1]

04 **Select your consultant**
You choose the CMC you want. If the shortlist is not the right fit, CMC-Canada provides another three candidates.[1]

05 **Deliver the work**
You and your CMC engage on the project — typically 40 hours across one to three months — and the engagement concludes with your agreed deliverables.[1]

You can request Wesley by name

The MAS Program does not require you to accept a random match. If the consultant you have in mind is a member in good standing of CMC-Canada and holds the CMC designation, you are free to request to work with them on your project.[1]

Wesley Paterson, CMC is a Certified Management Consultant in good standing, Vice Chair of CMC Alberta, and an active MAS lead consultant. Name him on your referral form — or call before you file it, so the scope is framed around the outcome you actually need.

Start the conversation: 1-403-928-9606 • wes@patersonconsulting.ca

> "I recently began working with Wes as a part of a team pursuing a big-picture project funded by the NRC IRAP MAS program. Through his facilitation, he was able to guide the discussions between our highly technical group to draw out the fundamental concepts and vision. What originally started as a moonshot idea is now feeling tangible and achievable through a roadmap that Wes has helped us develop."
>
> Andrea Mendoza, MPT — Founder, The ScoliClinic[2]

1. CMC-Canada, Management Advisory Services (MAS) Program Guide, "The Project: Process and FAQs" — https://www.cmc-canada.ca/
2. Paterson Consulting Inc., "Results & Testimonials" — https://patersonconsulting.ca/testimonials/

THE MENU

STRATEGY & BUSINESS PLANNING

Where do we go next, and how do we fund it?

Strategic Planning & Visioning

Typical scope: 40 hours · 1–3 months

- Vision, mission and values alignment across the leadership team
- Environmental scan of market, customer and competitive conditions
- Strategic priorities, objectives and measurable targets
- Multi-year strategic plan with owners and sequencing
- KPI framework and reporting cadence leadership will actually use

Business Plan Development

Typical scope: 40 hours · 1–3 months

- Business model, revenue mix and cost structure review
- Market, competitive and customer sections built on real research
- Operating, resourcing and milestone plan
- Financial assumptions, projections logic and sensitivity view
- Investor-, lender- or funder-ready business plan document

Growth Strategy & Prioritization

Typical scope: 40 hours · 1–3 months

- Review of business documents, plans and financial context
- Goal development with the ownership and leadership team
- Structured interviews with key internal and external stakeholders
- Assessment of current state against growth ambition
- Prioritized growth roadmap with decision gates

Financing & Funding Readiness

Typical scope: 40 hours · 1–3 months

- Mapping of grants, tax incentives, lenders and equity options
- Business case and investment narrative
- Capital requirement and cash-flow assessment
- Lender, investor and funder readiness review
- Application sequencing and evidence checklist

Every engagement above is designed to be delivered remotely — video working sessions, remote interviews and shared working documents — with deliverables agreed between you and your consultant.[1]

> "After a long search for the right CMC, we were presented with Mr. Wesley. A dedicated person with much experience in how to bring value to your project. Using his knowledge in different fields and professionalism, we were successful to have the right Business Plan that reflected exactly what we were looking for."
>
> Imed Jouini, BTech — General Manager, Highway Innovation Inc.[2]

Request Wesley Paterson, CMC on your MAS project — 1-403-928-9606 · wes@patersonconsulting.ca

1. CMC-Canada, Management Advisory Services (MAS) Program Guide, "The Project: Menu" — https://www.cmc-canada.ca/
2. Client testimonial as published by Paterson Consulting Inc. — https://patersonconsulting.ca/testimonials/

THE MENU

MARKET RESEARCH, SALES & MARKETING

Who buys, why they buy, and how you reach them.

Market Research & Competitive Intelligence

Typical scope: 40 hours · 1–3 months

- Secondary research on market size, segments and growth drivers
- Competitive landscape, positioning and pricing comparison
- Customer, buyer-persona and journey mapping
- Voice-of-customer and stakeholder interviews
- Referenced research summary you can reuse in plans and applications

Go-to-Market & Commercialization

Typical scope: 40 hours · 1–3 months

- Beachhead market selection and entry sequencing
- Value proposition, positioning and pricing logic
- Channel, partner and distribution options
- Validation roadmap before you scale spend
- Go-to-market plan with owners, timing and milestones

Sales Planning & Pipeline Design

Typical scope: 40 hours · 1–3 months

- Ideal customer profile and qualification criteria
- Sales process, stages and pipeline design
- Targets, territory and activity planning
- Outreach messaging, objection handling and proposal approach
- CRM and sales-reporting requirements that fit your size

Marketing Plan & Brand Positioning

Typical scope: 40 hours · 1–3 months

- Brand positioning, messaging platform and proof points
- Marketing plan by channel with budget and cadence
- Content, campaign and lead-generation priorities
- Website and digital-presence assessment
- Metrics that show what marketing is actually returning

Every engagement above is designed to be delivered remotely — video working sessions, remote interviews and shared working documents — with deliverables agreed between you and your consultant.[1]

"His work demonstrated a commendable understanding of our market, and his efforts helped us identify key target demographics that presented the best opportunities. His analysis, customer persona creation, and journey mapping provided us with useful insights to inform our strategic decision-making."

Spencer D'Amelio — Chief Product Officer, Cronometer[2]

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1. CMC-Canada, Management Advisory Services (MAS) Program Guide, "The Project: Menu" — https://www.cmc-canada.ca/
2. Client testimonial as published by Paterson Consulting Inc. — https://patersonconsulting.ca/testimonials/

THE MENU

LEADERSHIP, PEOPLE & GOVERNANCE

Building an organization that performs without heroics.

Governance & Leadership

Typical scope: 40 hours · 1–3 months

- High-level governance review and board-management interface
- Organizational structure analysis and design options
- Leadership mandates, decision rights and accountability
- Performance management and review practice
- Coaching for the leadership team on implementation

Culture, Change & Accountability

Typical scope: 40 hours · 1–3 months

- Culture, engagement and capacity diagnostic
- Assessment of rescue behaviour and hero-culture dependency
- Change plan, sequencing and communication approach
- Manager capability building for accountability conversations
- Sustainment measures so change holds after the project

Workforce & Skills Planning

Typical scope: 40 hours · 1–3 months

- Role, competency and capability mapping
- Training priorities and curriculum recommendations
- Recruitment, onboarding and retention levers
- Cross-training, depth charts and knowledge transfer
- Alignment of training plans to grant-eligible pathways

Succession, Exit & Transition Planning

Typical scope: 40 hours · 1–3 months

- Owner and leadership readiness assessment
- Value drivers and what a buyer or successor will test
- Transition scenarios and sequencing options
- Knowledge transfer and key-person risk reduction
- Contingency planning for unplanned events

Every engagement above is designed to be delivered remotely — video working sessions, remote interviews and shared working documents — with deliverables agreed between you and your consultant.[1]

> “Wes listened to the team’s needs and objectives and matched us with a wonderful facilitator that understood the team’s existing state and challenges… The time spent with Wes has been valuable in moving towards a high performing team.”
>
> Vanessa Bonneville, CPA-CA — Manager and City Controller, City of Medicine Hat[2]

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1. CMC-Canada, Management Advisory Services (MAS) Program Guide, "The Project: Menu" — https://www.cmc-canada.ca/
2. Client testimonial as published by Paterson Consulting Inc. — https://patersonconsulting.ca/testimonials/

THE MENU

TECHNOLOGY, AI & SPECIAL SITUATIONS

Systems, AI and transition-driven mandates.

Digital Transformation & System Selection

Typical scope: 40 hours · 1–3 months

- Current-state process, data and hand-off mapping
- Requirements definition and must-have / nice-to-have split
- Structured vendor and platform evaluation
- Phased implementation roadmap with cost and risk view
- Change, training and adoption plan

AI Readiness & Automation

Typical scope: 40 hours · 1–3 months

- AI and automation readiness assessment across people, process and data
- Use-case identification, scoring and prioritization
- Workflow automation candidates and effort-to-value view
- Data quality, privacy and governance guardrails
- Pilot plan with a defined ROI test

Sustainability & Energy Transition

Typical scope: 40 hours · 1–3 months

- Sustainability and energy-transition opportunity assessment
- Asset repurposing and land-use business cases
- Stakeholder, regulator and community engagement mapping
- Workforce, skills and leadership implications of transition
- Funding and partnership pathways for first-of-a-kind projects

Innovation & IP Commercialization

Typical scope: 40 hours · 1–3 months

- Technology readiness and commercialization gap review
- IP protection and licensing considerations
- Partner, pilot and demonstration strategy
- Pricing and revenue-model options for novel products
- Investor and program-funding narrative

Every engagement above is designed to be delivered remotely — video working sessions, remote interviews and shared working documents — with deliverables agreed between you and your consultant.[1]

Beyond the 40 hours

A MAS project is designed to produce clear decisions and a credible plan — not to finish the whole transformation. Many clients use the 40 hours to build the strategy, research and business case, then continue with Paterson Consulting on implementation support, corporate training, Lean Green Belt certification, facilitation, coaching or keynote delivery as separate engagements — or on a second MAS project as the next issue comes into focus. Wesley has delivered repeat MAS engagements with the same client where the first project earned the right to the second.[2]

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1. CMC-Canada, Management Advisory Services (MAS) Program Guide, "The Project: Menu" — https://www.cmc-canada.ca/

2. CMC-Canada consulting project profile, "Revive & Thrive: Humic & Fulvic Acid for Sustainable Growth" — second Paterson Consulting project with Carbon OxyTech through the MAS Program — https://www.cmc-canada.ca/Consulting-project-profile-Revive-and-Thrive

STRETCHING THE INVESTMENT

MAS is rarely the only support on the table

Clients who get the most from a MAS project treat it as the front end of a funding and financing strategy. Part of the value of working with a consultant who runs these projects regularly is that the roadmap is built with the available programs in mind — so the analysis you pay for once becomes evidence you can reuse in applications, business cases and lender conversations.

SR&ED tax incentives	Federal Scientific Research and Experimental Development incentives let Canadian businesses claim deductions and investment tax credits against eligible R&D work — often the largest ongoing support available to innovating firms.[1]
Canada-Alberta Productivity Grant	Cost-shared training funding for Alberta employers investing in productivity-focused skills development, delivered under a multi-year federal-provincial agreement.[2]
Alberta Manufacturing Productivity Grant	A provincial pilot administered by Canadian Manufacturers & Exporters supporting manufacturing productivity and technology-adoption projects.[3]
Alberta Innovates — Product Demonstration Program	Non-repayable funding and coaching for Alberta SMEs demonstrating and commercializing products with a strategic partner.[4]
NRC-IRAP advisory and funding	Beyond MAS, IRAP provides advisory services and funding to help SMEs build innovation capacity and take ideas to market, accessed through an Industrial Technology Advisor.[5]
Financing, lenders and capital	Growth, equipment and real-estate financing conversations — including development bank and commercial lender options — land better when the strategy, cash-flow view and risk story are already documented.

Practical note. Program names, budgets, intake windows and eligibility rules change. Paterson Consulting does not administer these programs and cannot guarantee an outcome — what we do is help you identify the credible options for your situation, build the evidence, and sequence the applications so they reinforce each other.

> “We have explored local, provincial and federal support programs and have done workshops together utilizing tools and leveraging Paterson Consulting expertise. If your business could benefit by having a Certified Management Consultant in your corner, I would highly recommend reaching out to Wes.”
>
> BJ Fuchs — Chief Executive Officer, Business Wide View[6]

1. Canada Revenue Agency, "Scientific Research and Experimental Development (SR&ED) tax incentives" — https://www.canada.ca/en/revenue-agency/services/scientific-research-experimental-development-tax-incentive-program.html
2. Government of Alberta, "Canada-Alberta Productivity Grant" — https://www.alberta.ca/canada-alberta-productivity-grant
3. Government of Alberta, "Alberta Manufacturing Productivity Grant" — https://www.alberta.ca/alberta-manufacturing-productivity-grant
4. Alberta Innovates, "Product Demonstration Program" — https://albertainnovates.ca/funding/product-demonstration-program/
5. Paterson Consulting Inc., "Services — NRC-IRAP and the MAS Program" — https://patersonconsulting.ca/services/
6. Paterson Consulting Inc., "Results & Testimonials" — https://patersonconsulting.ca/testimonials/

YOUR CONSULTANT

Why clients ask for Wesley Paterson, CMC

Wesley Paterson, CMC is President of Paterson Consulting Inc. in Medicine Hat, Alberta, Vice Chair of CMC Alberta, and author of The Hero's Rope. His MAS work concentrates on strategy and business planning, market research and go-to-market, sales and marketing planning, leadership and organizational culture, commercialization and AI-enabled transformation — with manufacturing, industrial, cleantech, technology and public-sector clients.[1,2]

MAS projects that earned national and international recognition

Transforming Brownfields into Brightfields

RenuWell Energy Solutions · Alberta

- Repurposing retired and orphan oil and gas well sites into micro solar generation
- 2025 CMC-Canada Consulting Project of the Year — Silver[3,4]
- Finalist, International Constantinus Awards[3]
- Covered by CBC News and PV Buzz

Revive & Thrive: Humic & Fulvic Acid

Carbon OxyTech · Alberta cleantech

- Second MAS-Program engagement delivered for the same client[5]
- 2024 Constantinus National Champion of Canada[6]
- Advanced to the Top 6 consulting projects internationally[6]
- "Put us on the global consulting map." — Wesley Paterson[6]

> "Motivated, conscientious and inspiring in the way he shares his many skills. He is a gifted coach."
>
> Keith Hirsche — Founder & President, RenuWell Energy Solutions Inc.[7]

> "He is very skilled in consulting with clients, understanding their needs and then delivering the necessary outcomes."
>
> Dr. Abdallah Manasrah, PhD — CEO, Carbon OxyTech Inc.[7]

Recognition

2025	CMC-Canada Consulting Project of the Year — Silver	Canadian Association of Management Consultants
2025	Management Consultancy Firm of the Year — Canada	Wealth & Finance International
2024	Constantinus National Champion of Canada · Top 6 international finalist	Constantinus International Awards
2024	Emerging Professional of the Year	Institute of Certified Management Consultants of Alberta
2026	Marquis Who's Who — Excellence in Consulting	Marquis Who's Who Ventures LLC
2022	Queen Elizabeth II Platinum Jubilee Medal (Alberta)	Lieutenant Governor of Alberta

1. Paterson Consulting Inc. — https://patersonconsulting.ca/
2. Wesley Paterson, CMC on LinkedIn — https://www.linkedin.com/in/wes-paterson-consultation/
3. Paterson Consulting Inc., "Awards & Recognition" — https://patersonconsulting.ca/awards/
4. CMC-Canada, "Transforming Brownfields into Brightfields" — https://www.cmc-canada.ca/transforming-brownfileds
5. CMC-Canada, "Revive & Thrive: Humic & Fulvic Acid for Sustainable Growth" — https://www.cmc-canada.ca/Consulting-project-profile-Revive-and-Thrive
6. IssueWire, "Paterson Consulting Inc. 2024 Constantinus International Award Nominee — National Champion of Canada" — https://www.issuewire.com/paterson-consulting-inc-2024-constantinus-international-award-nominee-national-champion-of-canada-1813924103631824
7. Paterson Consulting Inc., "Results & Testimonials" — https://patersonconsulting.ca/testimonials/

IN THEIR WORDS

What clients and colleagues say

> "Having established several startups and worked with numerous consultants, I was super pleased with Paterson Consulting and the exemplary work Wes provided. The professionalism, quality of work, in depth reference based research, detailed presentations and Wes's warm personality has put Wes on my permanent consultants list."
>
> Kambiz Taheri, MSEL, MBA, MScEng — Founder and CTO, Polymer Research Technologies Inc.

> "Through IRAP, we joined the CMC program in the summer of 2022 and luckily connected with Wesley for marketing-oriented training... I highly recommend Wesley if any start-ups or SMEs are looking for consultants on marketing, sales and leadership training."
>
> Vincent Yang, MDM — CEO, CELA Inc.

> "He is able to flow in and out of big picture thinking fluidly and was able to guide discussions to productive resolutions without being forceful or shortcutting the creative process... my group is now focused with clear, sequential objectives that we are excited about."
>
> Carl Ganzert, MScRS — Orthotist / Partner, Hodgson Orthopedic Group

> "His ability to navigate client expectations and managing issues is simply amazing. Wes is diligent, focused and a prolific problem solver, with the unique ability to identify rare opportunities and see business value areas which others can't fathom."
>
> Emil Tarka, MA, PMP — Founder & CEO, Tarka Consulting Inc.

> "Wes is a trusted advisor that guides you through the process. Helpful in all ways, he also steers you in the right direction for additional resources. Extremely knowledgeable on business."
>
> Richard Ehret — President, Magnum Fabricating Ltd.

Client testimonials as published by Paterson Consulting Inc.[1] Video testimonials and project discussion, including the CMC-Canada 20th Anniversary MAS Program event session, are available on the Paterson Consulting YouTube channel.[2]

Talk to Wesley before you file the form

A short call is usually enough to tell whether a 40-hour MAS project is the right instrument for your situation, what it should be scoped around, and which other programs belong in the plan. No obligation, no cost to explore.

Wesley Paterson, CMC
President, Paterson Consulting Inc.
Vice Chair, CMC Alberta

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1. Paterson Consulting Inc., "Results & Testimonials" — https://patersonconsulting.ca/testimonials/
2. Paterson Consulting Inc. on YouTube — https://www.youtube.com/@PatersonConsultingInc