



Accredited Africa Training Institute for Capacity Development

Unit FO409, Hatfield Plaza · 1122 Burnett St, Hatfield 0028 · Pretoria, Gauteng · South Africa

Tel: +27 12 004 8389 · Mobile: +27 65 077 6310

Email: apply@aaticd.co.za · Website: www.aaticd.co.za

COURSE BROCHURE

Business Broking Business Management

Services / Cleaning, Domestic, Hiring, Property and Rescue Services

Unit Standard 258122 · NQF Level 5 · 12 Credits · 9 Days

COURSE OVERVIEW

This course equips learners with the competencies to manage a business broking business or division effectively. It covers strategic planning, operational management, client relationship management, and compliance within the South African business broking context. Learners will gain the skills to drive profitability and sustainability in a broking enterprise.

Category	Services
Subfield	Cleaning, Domestic, Hiring, Property and Rescue Services
Unit Standard	258122
Accreditation	SAQA Accredited · NQF Level 5 · 12 Credits
Duration	9 days
Training Method	Online, On-Campus, In-House
Certificate	Issued via AATICD LMS – verifiable online

LEARNING OUTCOMES

- Apply strategic planning principles to develop a business plan for a broking division.
- Analyze market trends and client needs to identify growth opportunities.
- Evaluate financial performance and implement corrective actions to improve profitability.
- Design operational processes that ensure compliance with regulatory requirements.
- Implement effective client relationship management strategies to retain and grow business.
- Demonstrate leadership skills to manage teams and foster a high-performance culture.

WHO SHOULD ATTEND

- This course is designed for current or aspiring business brokers, branch managers, and division heads within broking firms.
- It is also suitable for entrepreneurs looking to establish or expand a broking business.

COURSE OUTLINE

Day 1: Introduction to Business Broking and Regulatory Framework

- Definition and scope of business broking
- Overview of the South African business broking industry
- Key legislation: Consumer Protection Act, Financial Intelligence Centre Act, and others
- Code of ethics and professional conduct
- The business broking process: listing to handover
- Roles and responsibilities of a business broker
- Industry bodies and accreditation (SAQA, IBR, etc.)
- Case study: typical business broking transaction

Day 2: Business Valuation Fundamentals

- Purpose of business valuation in a sale
- Overview of valuation approaches: asset-based, market, income
- Understanding financial statements: balance sheet, income statement, cash flow
- Normalising earnings and adjustments
- Key financial ratios: gross margin, EBITDA, net profit margin
- Practical example: valuing a small business using the multiple of earnings method
- Limitations of valuation methods
- Documentation required for valuation

Day 3: Listing and Marketing a Business for Sale

- Components of a business listing: description, financials, reason for sale
- Identifying buyer personas: strategic, financial, individual
- Marketing channels: online portals, networks, brokers, direct outreach
- Confidentiality agreements and blind listings
- Preparing a teaser and information memorandum
- Pricing strategy and negotiation room
- Legal considerations in marketing
- Case study: successful marketing campaign

Day 4: Buyer Qualification and Screening

- Importance of buyer qualification
- Financial qualification: proof of funds, credit checks, net worth
- Experience and industry fit
- Motivation and commitment assessment
- Managing multiple interested buyers
- Confidentiality and non-disclosure processes
- Buyer qualification checklist
- Role-play: buyer interview

Day 5: Negotiation Strategies and Deal Structuring

- Negotiation styles and strategies
- Key deal terms: purchase price, deposit, payment terms
- Earn-outs and performance-based payments
- Seller financing and promissory notes
- Asset vs share sale implications

- Letter of intent: purpose and contents
- Handling objections and closing the deal
- Ethics in negotiation

Day 6: Due Diligence Process

- Due diligence overview and timeline
- Financial due diligence: verifying financials, debt, assets
- Legal due diligence: contracts, licenses, litigation
- Operational due diligence: customers, suppliers, employees
- Tax due diligence: liabilities and compliance
- Environmental and regulatory checks
- Due diligence checklist
- Case study: due diligence outcome

Day 7: Legal Documentation and Compliance

- Sale of business agreement: key clauses
- Conditions precedent and subsequent
- Warranties and indemnities
- Non-compete and restraint of trade clauses
- FIC Act compliance: identity verification, record keeping
- Role of attorneys and conveyancers
- Transfer of licenses and permits
- Document checklist and filing

Day 8: Financing Options and Tax Implications

- Financing options: bank loans, seller financing, private equity
- Loan application process and requirements
- Capital gains tax: calculation and exemptions
- Transfer duty and VAT implications
- Tax implications for asset vs share sale
- Structuring for tax efficiency
- Role of financial advisors and accountants
- Case study: financing a business purchase

Day 9: Post-Sale Transition and Business Broking Practice Management

- Transition planning: handover timeline and key tasks
- Managing earn-out periods and performance tracking
- Post-sale relationship with buyer and seller
- Building a business broking practice: branding, lead generation, systems
- Compliance and record keeping for your practice
- Networking and referral strategies
- Professional development and accreditation renewal
- Final project: complete a simulated business broking transaction

ASSESSMENT & CERTIFICATION

Delegates are assessed through exercises and a final test. A mark of **50% or above** earns an **AATICD Certificate of Completion**, issued digitally with a unique verification code. This course carries **12 NQF credits** at **NQF Level 5**.

PRICING (PER DELEGATE, EX-VAT)

Delegates	Training Method	Price per Delegate	Total
1	Online	R 35,000.00	R 35,000.00
1	In-House	R 45,500.00	R 45,500.00
1	On-Campus (Pretoria)	R 52,500.00	R 52,500.00

UPCOMING SESSIONS

Start	End	Method	Venue
31 Jul 2026	12 Aug 2026	On-Campus	Lagos, Nigeria
03 Aug 2026	13 Aug 2026	On-Campus	Mauritius
04 Aug 2026	14 Aug 2026	On-Campus	Cape Town, South Africa
05 Aug 2026	17 Aug 2026	On-Campus	Dubai, UAE
06 Aug 2026	18 Aug 2026	On-Campus	Pretoria, South Africa
06 Aug 2026	18 Aug 2026	On-Campus	Lagos, Nigeria
07 Aug 2026	19 Aug 2026	On-Campus	Johannesburg, South Africa
10 Aug 2026	20 Aug 2026	On-Campus	Cape Town, South Africa

Contact us if no suitable date is listed – on-demand sessions can be arranged for groups.

HOW TO GET A QUOTE OR APPLY

1. **Get an instant quotation online:** visit www.aaticd.co.za, open the page for this course (Unit Standard 258122) and click **Get A Quote / Apply**. Select your training method and number of delegates – your quotation is generated immediately and emailed to you with the course brochure attached.
2. **Apply by email:** send the course title, your preferred training method (Online, In-House or On-Campus Pretoria), the number of delegates and your preferred dates to apply@aaticd.co.za – our team will reply with a formal quotation.
3. **Apply by phone or WhatsApp:** call **+27 12 004 8389** or WhatsApp **+27 65 077 6310** and we will prepare your quotation and reserve your seats.
4. **Confirm your booking:** accept the quotation and settle the invoice. As soon as payment is confirmed your delegates are enrolled and receive their AATICD LMS login details by email, along with joining instructions for their chosen training method.

Group discounts apply automatically – the more delegates you enrol, the lower the price per delegate. No payment is required to request a quotation.

Accredited Africa Training Institute for Capacity Development

Unit FO409, Hatfield Plaza, 1122 Burnett St, Hatfield 0028, Pretoria, Gauteng, South Africa
Tel: +27 12 004 8389 · WhatsApp: +27 65 077 6310 · apply@aatid.co.za · www.aatid.co.za